

Ownership & Accountability Worksheet

A print-friendly, fillable tool for establishing who owns pastoral care and who can make key decisions.

RESOURCE 1
BINDER TAB 01

When you finish, your church will have:

- One clearly named primary owner for pastoral care
- A clear accountability relationship
- A named backup owner
- A higher-level authority for escalated decisions
- Clear rules for who can make common pastoral-care decisions

How to use this worksheet

- 1 Complete this with the senior pastor and the people who currently lead or coordinate pastoral care.
- 2 Use ROLE TITLES first. Add the current person's name underneath.
- 3 Choose ONE primary owner. Many people may provide care; one role should be accountable for making sure the function works.
- 4 For each decision situation, answer the plain-language questions. Do not invent new categories.
- 5 Review the completed worksheet together and obtain leadership approval.

Keep this distinction in mind

Providing care means helping people. Owning pastoral care means being responsible for making sure the church's care process works. The owner does not have to personally provide every act of care.

Step 1 - Name the Primary Owner

Start with the role that is responsible for making sure pastoral care works as intended.
Choose one role that is ultimately responsible for making sure pastoral care functions.

REAL-WORLD TEST

A care request is missed. Two leaders thought someone else was handling it. Which ROLE is responsible for making sure the breakdown gets fixed? That is the role you are naming here.

Primary owner - church role/title

Person currently serving in this role

NO ONE CURRENTLY SERVES IN THIS ROLE?

Write "VACANT" above. As part of building your pastoral-care structure, leadership should assign an interim or permanent person to this role before the system is implemented.

How will the primary owner function in your church's pastoral-care system?

Check ONE.

- ☐ Directly leads the pastoral-care ministry or function
- ☐ Oversees pastoral care while another person coordinates day-to-day operations
- ☐ Coordinates the day-to-day pastoral-care operations
- ☐ Another arrangement

If "Another arrangement," describe it:

Step 1B - Confirm What the Owner Is Responsible For

Make the primary owner's responsibilities clear.

RESOURCE 1
BINDER TAB 01

Check each responsibility the primary owner will carry:

☐ Makes sure the pastoral-care process is functioning.

☐ Makes sure people providing care know their roles.

☐ Addresses missed handoffs or follow-through.

☐ Addresses inconsistent pastoral-care practices.

☐ Receives problems that need leadership attention.

☐ Keeps church leadership informed about pastoral-care system needs.

If you leave a box unchecked

Decide which other role owns that responsibility. If nobody owns it, you have found a responsibility gap that needs to be assigned.

Role responsible for any unchecked item(s)

Step 2 - Establish Accountability

Identify who holds the primary owner accountable for the pastoral-care function.

RESOURCE 1
BINDER TAB 01

WHAT DOES 'ACCOUNTABLE TO' MEAN?

This is the person or leadership role that can review a problem, require a correction, and follow up to make sure the problem is addressed. It is not simply the person the owner talks to most often.

Who holds the primary owner accountable? - role/title

Person currently serving in this role

This accountability role is expected to: Check all that apply.

- ☐ Review concerns about how the pastoral-care function is operating
- ☐ Require corrective action when a system problem is identified
- ☐ Follow up to make sure agreed changes were made
- ☐ Address unresolved concerns involving the primary owner

Step 3 - Establish Backup Responsibility

Name who takes responsibility when the primary owner is unavailable.

RESOURCE 1
BINDER TAB 01

THE GOAL

No volunteer should have to guess who is in charge because the primary owner is on vacation, sick, off-site, or otherwise unavailable.

Backup owner - role/title

Person currently serving in this role

When does the backup role take over? Check ONE.

- ☐ Whenever the primary owner is unavailable
- ☐ Only during planned absences
- ☐ During planned absences AND emergencies
- ☐ Only when the primary owner formally delegates responsibility
- ☐ Another rule - write it below

If 'Another rule,' write the rule here:

Step 4 - Establish Decision Authority

Use the Decision Authority Catalog to identify the pastoral-care decisions your church needs to authorize.

RESOURCE 1
BINDER TAB 01

WHAT YOU ARE DOING IN THIS STEP

Pastoral care involves many different decisions. The same person may not have authority to make all of them. The separate Pastoral-Care Decision Authority Catalog gives your church a ready-made list of common decisions. Your job is to identify which decisions apply to your church, then establish who has authority for each one.

FIRST: COMPLETE THE DECISION AUTHORITY CATALOG

1. Review the catalog with your leadership team.
2. Mark each decision: Applies to Our Church, Does Not Apply, or Needs Discussion.
3. Add any church-specific decisions that are not already listed.

THEN: USE THE REUSABLE WORKSHEET ON THE NEXT PAGE

For every catalog decision marked Applies to Our Church:

- Copy the decision onto the worksheet.
- Name the role that normally handles it.
- Decide whether that role can decide, must consult first, or must escalate.
- Duplicate the worksheet as many times as needed until every applicable decision has an authority rule.

WHEN STEP 4 IS COMPLETE

Your church should be able to answer this question for every applicable decision:

Who can make this decision - and when must it move to someone else?



Step 4 - Decision Authority Worksheet

Complete one copy for each decision your church marked Applies to Our Church in the catalog.

RESOURCE 1
BINDER TAB 01

PASTORAL-CARE DECISION

Who normally handles this decision? - role/title

What authority does this role have? Check ONE.

☐

YES - CAN DECIDE This role can make this decision without getting permission first.

☐

CONSULT FIRST This role must talk with another leader before making the decision.

☐

ESCALATE This role cannot make the decision. Another role must decide.

If CONSULT FIRST, who must they contact? - role/title

If ESCALATE, who makes the decision? - role/title

Any limits, conditions, or church-specific instructions?

REPEAT THIS PAGE

Duplicate this worksheet for each catalog decision marked Applies to Our Church.

Step 5 - Name Higher-Level Authority

Identify who has final authority when a pastoral-care matter must move higher.

RESOURCE 1
BINDER TAB 01

WHAT IS HIGHER-LEVEL AUTHORITY?

This is the church role that receives decisions or concerns that cannot be resolved at the primary-owner level. Depending on your church, this may be the Senior Pastor, Executive Pastor, board, elders, or another governing authority.

Higher-level authority - role/title

Person currently serving in this role

Send a matter to this higher-level authority when: Check all that apply.

- ☐ The primary owner does not have authority to make the decision
- ☐ Church policy or governance requires a higher-level decision
- ☐ There is a serious concern about care, conduct, or leadership action
- ☐ A decision remains unresolved after consultation

Any additional church-specific reason for escalation:

Final Review & Leadership Approval

Review the completed structure together and confirm leadership approval.

RESOURCE 1
BINDER TAB 01

Your team should be able to answer YES to every statement.

- ☐ We can name ONE role that owns the pastoral-care function.
- ☐ We know who holds that owner accountable.
- ☐ We know who takes ownership when the primary owner is unavailable.
- ☐ For common decisions, we know who normally handles the decision.
- ☐ We know when that person can decide, must consult, or must escalate.
- ☐ We know who receives higher-level or unresolved decisions.

Leadership approval - name/title

Approval date

Church / organization name

COMPLETED RESOURCE

Save the digital copy and print the approved worksheet for BINDER TAB 01 - Leadership, Roles & Pastoral Scope.

Leadership Approval Signature: _____ Date: _____