04 · LEADERSHIP ADOPTION WORKBOOK

# LEADERSHIP ADOPTION WORKBOOK

A 30-minute discussion, a decision record, and a 30-day implementation plan.

Working draft v0.2 · 22 October 2026 · For church leadership review

## BEFORE THE MEETING

- Invite a responsible pastor or elder, an operations lead, and the person who will own approved tools.
- Bring an inventory of AI tools already in use, including AI features within other software.
- Do not include confidential member details in the inventory or this workbook.

## 30-MINUTE MEETING AGENDA

| Minutes | Conversation | Decision |
|---|---|---|
| 0–5 | What AI do staff already use? | Three most common uses |
| 5–10 | Formal policy or short guidelines? | Choose initial path |
| 10–20 | Review scenarios and the decision guide | Select prohibitions and review needs |
| 20–25 | Who approves tools and handles incidents? | Name policy owner |
| 25–30 | How will staff be oriented? | Set date and next review |

## DECISION RECORD

Church and meeting date _____

Adoption path: ☐ Staff guidelines (Path B) ☐ Formal leadership policy (Path A)

Decision-making body and approver _____

Policy owner / backup contact _____

Approved tools (link or register) _____

Priority risk requiring action now _____

Orientation date _____ Review date _____

Items held for legal, safeguarding, or theological review _____

## 30-DAY ROLLOUT CHECKLIST

| Days | Actions | Done |
|---|---|---|
| **1–7** | Confirm policy owner, tool inventory, initial data boundaries, and local safeguarding requirements. | |
| **8–14** | Adapt and approve the chosen guidance, document exceptions, and share the approved-tools register. | |
| **15–21** | Orient staff with 3–5 scenarios; distribute the decision guide; collect receipt acknowledgments. | |
| **22–30** | Check understanding, review early questions and incidents, and schedule the next review. | |

## PASS, HOLD, OR REVISE

At day 30, use this test to decide what comes next.

**PASS**

Leaders have adopted a written path, assigned an owner, and successfully oriented staff.

**HOLD**

Critical safeguarding, privacy, or governance decisions remain unresolved.

**REVISE**

Staff cannot consistently apply the decision guide.

## 30-DAY REFLECTION

Capture what you learned while it's fresh. It will shape your next review.

Most confusing scenario _____

New workflow staff feel confident using _____

Time spent on adoption _____

Unresolved policy questions _____

Optional: share your reflection with Tekton Legacy at corey@tektonlegacy.com to help improve the kit. Leave out names and confidential details.