



Delegating Effectively

Participant Training Manual
Comprehensive Public Training Program



Revised 12/072016

DELEGATION CHECKLIST

Step	Step	Description	Notes
1	Decide to Delegate	<ul style="list-style-type: none"> Overcome objections Evaluate the task Review the risk 	
2	Engage the Employee	<ul style="list-style-type: none"> Evaluate the department Determine the best person for the task Rotate assignments 	
3	Communicate Clearly	<ul style="list-style-type: none"> Explain the task Practice two-way communication Designate authority level 	
4	Determine Deadlines	<ul style="list-style-type: none"> Set checkpoints Set standards of success Create delegation log 	
5	Review Resources	<ul style="list-style-type: none"> Determine resources Inform others (Subject Matter Experts, etc.) Coach employee on use of resources 	
6	Meet & Monitor	<ul style="list-style-type: none"> Track progress Review challenges Revise as needed 	
7	Recognize & Reward	<ul style="list-style-type: none"> Recognize completion Reward success 	
8	Debrief & Document	<ul style="list-style-type: none"> Evaluate the process Document procedures Share knowledge 	

LEVELS OF DELEGATION

LEVEL	Action	Description	Notes
A	Decide and take action.	This is the freest rein you can give an employee. It requires a high degree of confidence, as well as good controls that will send up red flags if things get out of hand.	
B	Decide and take action, but let me know what you did.	This is similar to Level A, but gives you a faster reaction time, if needed, to correct a wrong course. The confidence level must still be high.	
C	Decide and let me know your decision. Then take action unless I say not to.	At this point, you are beginning to control the action. This allows you to look at what is being planned, but saves you time, because the employee did the actual planning and will do the implementation.	
D	Decide and let me know your decision, but wait for my go-ahead.	The distinction between this level and Level C is small but important. Here the employee must get definite approval before proceeding. In instances where you do not have complete confidence in the person or if the person is a new team member, this may be a useful option.	
E	Decide what you would do. Tell me the options you considered and the pros and cons of each.	This is asking for the employee's analysis and recommendations. You are able to review the employee's thought processes while assuring yourself that the course of action is the best.	
F	Look into this problem and give me the facts. I will decide how to handle it.	This is asking for investigation and some analysis. You reserve the decision for yourself.	
G	Wait to be told.	This is not delegation. You control the task's decision, direction, and execution.	

DELEGATION LOG

Start Date	Delegated to	Project Description	Checkpoint Date 1	Checkpoint Date 2	Due Date	Date Completed

Resources

Notes

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DELEGATION PLANNING

Your Team

Who's your 'go-to person'? The one you count on all the time to help with extra projects?

Who's the 'diamond in the rough' in your department? This person is newer or not quite as skilled, but is motivated and willing to learn.

Who's the person who has the best technical skills in your department? Are they able to teach others those skills?

Who's the person with the best people skills in your department? How could they help you teach others?

Who needs motivation to become a stronger member of the team?

Who's the historian in your department? The senior team member who knows the most about where you've come from and who has the most information in his/her head that others need to know.

Who are some of the other rising stars in your department? What are their workloads like?

Who are the other members of your team who need help to operate up to their full potential?

- ◆ What skills could they use to develop?
- ◆ What tasks would help them develop those skills?

DELEGATION PLANNING

Plan a Task

What is the work that needs to be done?

What part of the work can and should be delegated?

What is the best match of work with the employees' abilities and interests?

Whom would the assignment help to develop?

Who can do it for me now?

Who can be trained to do it?

What is the best course of action, other than doing it myself, given the deadlines involved?

DELEGATION COMMUNICATION PRACTICE

COMMUNICATE:

- Explain the task
- Designate the authority level
- Set checkpoints and deadlines
- Set standards of success
- Coach employee on resources available
- Inform others (subject matter experts, team members, liaisons)

MONITOR:

- Track progress
- Review challenges
- Revise as needed

FOLLOW UP:

- Recognize completion
- Reward success
- Evaluate
- Document
- Share knowledge
