

DELEGATION PLANNING & AGREEMENT FORM

Person Delegating Assignment: _____

Person(s) Accepting Delegation Assignment: _____

Date Delegation Assignment Discussed: _____

Type of Delegation

Professional Development Best Resource Enable Priority Work Team

Context for Delegation

Why this assignment to this person at this time?

The What

What specifically is the task being delegated?

The Measurement

How will you both know that the task was achieved successfully?

The What Not

What is the scope/the boundaries of this assignment?

Considerations:

- Is there a budget?
- Are there quality measures?
- Is there an expected quantity?
- What relationships have to be specially managed?
- Will process suggestions be helpful?
- Who will questions be asked of?
- Is there documentation available?
- Is training available?
- In what format will assignment be delivered?
- Will any current work need to be delayed or reassigned?

Process

Is a specific process for completion required or preferred?

Resources

What resources are available and how are they accessed?

Check-ins

Scheduled Check-in Date/Time	Actual or Additional Check-in Date	Notes on Progress, Adjustments, or Support Needed

Assignment Completion - Record Notes Here:

Considerations:

- Did the assignment meet the requirements/measurements in whole or in part?
- What did we each learn?
- What went well?
- What would we each do differently next time?
- Can we expect this task to be completed again?
- Will this become a regular assignment?
- Will anyone else need to be trained on this task/process?