



THE HOW AND WHY OF DELEGATION

We often have staff who are willing or who have the potential to contribute in more or different ways. Effective delegation practices build skills and job satisfaction while improving the effectiveness of a department or organization.

Delegate when...

you want to provide a development opportunity

there is someone better skilled to complete the task

it allows you to focus on priority work

the assignment will benefit from multiple perspectives and skills

THE DELEGATION PROCESS

Process

1. Get clear yourself.

- a. **The What:** What specifically are you delegating and how will you define that it is done correctly? Consider budget, quality, quantity, and relationship management.
- b. **The What Not:** What are you NOT delegating? It is important to know and communicate if something is not in scope of the assignment.
- c. **Process:** Does process matter to the assignment? Does the task require (legally or procedurally) a specific process for completion? What is the plan for ensuring the process is followed? Whenever possible, latitude should be provided to complete the task using their own style.
- d. **Development:** What development resources are available and how are you making them available to the employee (training, coaching, documentation)? Who should the employee contact with questions?
- e. **Logistics:** What are the logistics regarding this assignment? When is it due, when are check-ins required, are there points in the assignment where approval is needed, how will the assignment be “delivered”?
- f. **Context:** Are you offering this as an opportunity for the employee (and therefore he or she can say no) or are you assigning it? Why are you asking the employee – is there something specific about this person, this time, or this task that is leading to this assignment?

2. Communicate the assignment.

- a. **More Than Once:** Provide the assignment in at least two ways. You should have a one-on-one conversation about the assignment. A written document is a good option for the second communication method. See programsavvy.com/resources/ for a Delegation Planning and Agreement Worksheet.
- b. **The Details:** Include all the details you considered prior to this conversation.
- c. **Dialogue/Negotiate:** Provide lots of opportunity for questions to be asked. Ask for concerns about the assignment (the task itself, the timing, the support available). Be prepared to address concerns about overload or timing. What are you willing to delay of the employee’s current work load?

THE DELEGATION PROCESS

3. Stay in touch.

- a. **Scheduled:** Part of your agreement should have been when you will touch base on the assignment. Mark those dates in your calendar and make them a priority. Approach as a “may I provide support?” discussion rather than appearing to be checking up on them.
- b. **Unscheduled:** If you see efforts being made toward the assignment or successes, acknowledge them. If you are concerned, ask without assumptions of failure.
- c. **Be Available:** Prioritize any requests of your employee regarding this assignment.
- d. **Allow for Mistakes:** If you are staying in touch throughout the process, mistakes will likely not be catastrophic. Remember that it is possible that you would have made mistakes too. Be supportive.

4. Complete It

- a. **Assess:** Determine if the assignment met the requirements. If not, determine whether to reassign to the employee or to someone else, accept the results, or do it yourself. It is possible some of the assignment was done well and other parts not.
- b. **Give Feedback:** If the assignment or part of the assignment was done well, make sure to acknowledge this. When appropriate, give credit to the employee who did the work (instead of claiming the work as your own). If the work was not done well, acknowledge that too and discuss what the barriers were. Most failures are due as much to process and knowledge gaps than someone simply choosing to do poor work.
- c. **Identify Next Steps:** Will the employee perform this task again? How might the task be done differently if done again? Will the employee be involved in training others on the process if it will become a regular task moving forward?



DELEGATE WHEN YOU WANT TO PROVIDE A DEVELOPMENT OPPORTUNITY

Description

We often have staff who are willing or who have the potential to contribute in more or different ways. Effective delegation practices build skills and job satisfaction while improving the effectiveness of a department or organization.

Challenging and skill-building assignments can help an employee build their own value in their organization.

Follow ‘The Delegation Process’ and consider the following:

- 1. Process:** Process can be tricky for someone who is just learning a task. You may provide more help and guidance than for someone who has done this type of work before. Do not make assumptions about what they know (or do not know) about legal or regulatory requirements.
- 2. Doable:** Stretch assignments are great, but be careful this assignment isn't too big of a stretch. If this task is new to someone, it will take them longer to do it, and that should be part of the planning. It will be better for everyone if the employee is successful in their work.
- 3. Future Planning:** If the employee is successful, are you going to provide an opportunity for this employee to take on ownership of this task? Do they want that? Keep in mind that keeping competency in a skill usually requires that we continue to practice that skill.

A background image showing a group of business professionals in a meeting, looking at documents and laptops. The image is overlaid with a semi-transparent orange filter.

DELEGATE WHEN THERE IS SOMEONE BETTER SKILLED TO COMPLETE THE TASK

Description

You are not always the most talented person to accomplish a task. If quality or time is of the essence, consider delegating to your team's best resource for the given task. This is an excellent strategy when the task is a one-time or rare task. The task may or may not have been one accomplished by this employee before, but you believe that they have the skills required to accomplish it, even if learning is required.

You are not always the team's best resource.

Follow 'The Delegation Process' and consider the following:

- 1. Degree of Expertise:** "Best Resource" does not necessarily mean expert. The employee may still need some level of support, and that support may need to come from different places such as another department, a professional organization, or a collaborative partner.
- 2. Future Planning:** Now that this person has completed this work, is there an expectation that they will continue doing this work? Now that they figured it out, will there be a need to train others? Should the employee be documenting the process for future use?



DELEGATE TO ALLOW YOU TO FOCUS ON PRIORITY WORK

Description

This is the reason most manager's think of when it comes to delegation. But, if you treat delegation as simply dumping your work on someone else, the level of commitment to achieve it will be low. This approach is fine if there are unique pressures during this time (such as a special project), if you are building new processes/structures within the workforce, or you are taking on additional accountabilities that require a new distribution of work. When this process is used be sure to look across your staff in the distribution of work. Any burdens should be shared.

Part of your priority setting success depends on your willingness and ability to delegate.

Follow 'The Delegation Process' and consider the following:

- 1. Context:** Be clear as to the reason for the assignment. Don't frame it as a development opportunity or the employee having unique skills if that is not the actual reason. Tell how the achievement of the task will help the department or organization. If the employee is freeing you up to take on a special project then be honest about that. Be prepared to discuss why you are not the right person to complete the task and they are.
- 2. Timing:** Let the employee know how long you anticipate that he or she will take on this task. Is this a permanent assignment or time-bound?
- 3. Other Duties:** If the work being taken on is significant you should be considering what in their current job is going to be moved, reduced, or eliminated. Alternatively, hours to the employee's schedule could be added (especially if compensated) to allow for the achievement of the work. To protect the organization, a maximum number of hours should be identified to accomplish the task once the task is learned.



DELEGATE TO A TEAM WHEN THE ASSIGNMENT WILL BENEFIT FROM MULTIPLE PERSPECTIVES AND SKILLS

Description

Some tasks can be shifted from you to a team or from one team to another team. The team as a whole is held accountable for the completion of the task.

Teams almost always outperform individuals.
Some tasks will benefit from a team approach.

Follow ‘The Delegation Process’ and consider the following:

- 1. Process:** Allow the team to manage who on the team manages which aspects of the assignment, even if you need to outline some process requirements.
- 2. Communication:** Communicate the assignment to the whole team at once and agree to how communication to you will occur at checkpoints and for questions.
- 3. Highly Functioning:** If the assignment is critical, it is best to assign to a highly functioning team. Delegating to an emerging team can be a strategy for improving their functioning, but there is risk to the assignment delivery if the team does not succeed in working well together.
- 4. Team Training:** You may need to focus as much on team skills as the skills needed to complete the assignment. Team training should yield results beyond the current assignment.