

## The Why and How of Delegation

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*Delegation is assigning work to an employee or a team that isn't part of the current job responsibilities. Delegation, done well, follows practices that ensure that the employee and the organization benefit from the assignment.*

### 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.

**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? If the task requires (legally or procedurally) a specific process for completion, what is your plan for ensuring the process is understood and followed?
  - i. If a specific process is not required, process suggestions might be helpful to someone who has not completed the task before. However, latitude should be provided to complete the task using his or her 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? Be sure that this assignment is not too significant of a stretch.
- 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 – ideally in a one-on-one conversation and as a written summary following the conversation. A draft of the written summary could be created in your “get clear yourself” step.
- b. **The Details:** Include all the details you considered prior to this conversation.
- c. **Dialogue/Negotiate:** Provide lots of opportunity and support for questions. Ask for concerns about the assignment (the task itself, the timing, the support). Be prepared to address concerns about overload or timing. What are you willing to delay of the employee’s current work load?

## 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 a checking over the employee’s shoulder.
- 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 this task is new to someone, it will take him or her longer to do it than it would have taken you, and possibly with errors along the way. 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 regularly? If so, agree to any changes needed from current assignment, identify schedule, and how the employee will be measured.

# 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 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 that simply would benefit from the person most skilled at achieving it being given the responsibility. The task may or may not have been one accomplished by this employee before, but you believe that he or she has the skills required to accomplish it, even if learning is required.

## 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:** If the task requires (legally or procedurally) a specific process for completion, what is your plan for ensuring the process is understood and followed? Given that you have chosen this person due to a skill set, you should allow other process decisions to be made by the employee.
- d. **Development:** If this specific task is new to the employee, what development resources are available and how are you making them available to the employee (training, documentation)? Often times resources from outside of your area are most appropriate with these assignments.
- 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? Affirm your belief that the employee is the most skilled to deliver on this assignment.

## 2. Communicate the assignment.

- a. **More Than Once:** Provide the assignment in at least two ways – ideally in a one-on-one conversation and as a written summary following the conversation. A draft of the written summary could be created in your “get clear yourself” step.
- b. **The Details:** Include all the details you considered prior to this conversation.
- c. **Dialogue/Negotiate:** Provide lots of opportunity and support for questions. Ask for concerns about the assignment (the task itself, the timing, the support). Be prepared to address concerns about overload or timing. What are you willing to delay of the employee’s current work load?

## 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 a checking over the employee’s shoulder.
- 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:** Even though you assigned this task to this employee because you felt that he or she was the best suited for it, it doesn’t mean that the employee is an expert. In the process of figuring it out, there may be mistakes or do-overs. 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 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 requires 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.

### Process:

Follow the most appropriate process from above (development opportunity or best skilled person), considering 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 his or her 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 the employee taking on more work instead of you is appropriate in this case.
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 his or her 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 teams 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.

### Process:

Follow the most appropriate process from above (development opportunity or best skilled), considering 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.