



# Delegating Effectively

Participant Training Manual  
Comprehensive Public Training Program



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# DELEGATING EFFECTIVELY

## COURSE DESCRIPTION

This course helps supervisors identify tools to implement in the workplace to ensure successful delegation. This includes confidence in staff's ability to achieve success in the tasks delegated to them. This class is open to all supervisors and managers.

## JOB/LEARNING OUTCOMES

By the conclusion of this session, learners will be able to:

- ◆ Apply the 8 Steps of Delegation to increase efficiency and develop employees.
- ◆ Use tools and techniques to monitor and coach employees on delegated tasks.

## DELEGATING — WHY OR WHY NOT?



In your groups, answer these two questions:

- ◆ Why don't I delegate more often?
- ◆ What are the reasons I should delegate more tasks?

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# DELEGATING EFFECTIVELY

## THE BASICS

Delegation is normally used to give the supervisor time to do things that only they can do, to improve productivity, or to develop employees. *Remember, there are some tasks that you can't delegate.* As a supervisor, you must make sure you know what responsibilities you can entrust to your team members.

You should never delegate tasks that require your personal authority or position to complete, such as performance reviews, reassignment determinations, or employee reward/recognition decisions.

When thinking about what to delegate, it helps to divide your work into three categories.

- 1. *First*, work that only you, the supervisor, can do.
- 2. *Second*, work you can delegate as soon as someone is able to take it on.
- 3. *Third*, work that you can delegate immediately.

Once you have chosen the tasks to delegate, you will decide how to track the employee's progress and maintain an appropriate level of control without micromanaging. The materials in this manual will help you to create this delegation plan.

**NOTES:**

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## THE 8 STEPS OF EFFECTIVE DELEGATION



1. **Decide to Delegate**
2. **Engage the Employee**
3. **Communicate Clearly**
4. **Determine Deadlines**
5. **Review Resources**
6. **Meet & Monitor**
7. **Recognize & Reward**
8. **Debrief & Document**

**NOTES:**

[illegible]

# DELEGATION CHECKLIST

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



# LEVELS OF DELEGATION

LEVEL	Action	Description	Notes
<b>A</b>	<b>Decide and take action.</b>	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>B</b>	<b>Decide and take action, but let me know what you did.</b>	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.	
<b>C</b>	<b>Decide and let me know your decision. Then take action unless I say not to.</b>	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.	
<b>D</b>	<b>Decide and let me know your decision, but wait for my go-ahead.</b>	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.	
<b>E</b>	<b>Decide what you would do. Tell me the options you considered and the pros and cons of each.</b>	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.	
<b>F</b>	<b>Look into this problem and give me the facts. I will decide how to handle it.</b>	This is asking for investigation and some analysis. You reserve the decision for yourself.	
<b>G</b>	<b>Wait to be told.</b>	This is not delegation. You control the task's decision, direction, and execution.	

# DELEGATION LOG

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

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

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

## 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

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## 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

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## 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)

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## MONITOR:

- Track progress
- Review challenges
- Revise as needed

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## FOLLOW UP:

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

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