



DELEGATION CHECKLIST

PREPARATION PHASE

_____ 1. Specify the goals of the delegation.

_____ 2. Specify the job to be delegated (what needs to be done):

a. What are the expected results? How will the outcomes be judged?

b. What materials, resources, and information are needed?

c. What relevant policies and procedures need to be considered?

d. What is the time frame for project (estimated completion date)?

e. What is the budget for the project?

f. Who else is/should be involved (suppliers, volunteers, other staff, etc.)?

3. Decide to whom the task will be delegated:

a. What are the knowledge/skills/experiences required for the task?

b. Who on your staff possesses the necessary abilities, knowledge, skills, experience, developmental goals, and so forth?

c. If no one on staff possesses the necessary abilities, knowledge, skills, experience, developmental goals, etc., who else on your staff is trainable?

d. What is the person's current workload?

e. How much time does the potential delegate have to devote to this assignment?

f. What other priorities does the potential delegate have? Which of them can be shifted to someone else or postponed?

g. What level of support does the individual need/want from you?

ASSIGNMENT PHASE

_____ 1. Meet with the designated delegate and explain project:

a. The reasons for delegating to him/her:

b. The goal(s) and anticipated outcome(s) of the delegation and how it fits into the larger mission of the organization:

c. The due date and any anticipated obstacles to meeting the due date:

d. The deliverables (be specific):

e. The amount of authority that the delegate will have:

f. Benefits and consequences of completing/not completing the project:

_____ 2. Determine the actions, assistance, and resources that the delegate will require.

**_____ 3. Determine how the assignment will affect the person's current workload.
Discuss necessary adjustments or re-prioritizations.**

**_____ 4. Have the employee prepare a plan outlining how the job will be accomplished,
anticipated obstacles and ways to avoid or deal with these obstacles.**

_____ 5. Set a meeting time to discuss the employee's ideas.

FEEDBACK PHASE

- _____ 1. Discuss the employee's plan.
- _____ 2. Verify that the goals are understood.
- _____ 3. Specify the resources that will be made available and make any necessary introductions to others who will be involved in the project.
- _____ 4. Set checkpoint dates for regular feedback and updates.
- _____ 5. Reiterate how much authority you will confer.
- _____ 6. Discuss how much follow-up to expect.
- _____ 7. Emphasize the employee's responsibility for the outcomes.

AUDIT PHASE

- _____ 1. Monitor the progress of the delegation; compare time expended to time frames established in assignment phase.
- _____ 2. Set intermediate goals for course corrections where necessary; make adjustments in response to unforeseen problems.
- _____ 3. Ensure that needed materials, resources, and so forth are available to the employee.
- _____ 4. Discuss problems and progress at designated checkpoints and/or as needed.
- _____ 5. Offer encouragement; do not revoke the delegation or begin to perform certain elements of the task yourself.

APPRECIATION PHASE

- _____ 1. Accept the completed project and acknowledge the employee's efforts.
- _____ 2. Reward the employee for achievements.
- _____ 3. Accept your own accountability. Do not blame the employee for less-than-satisfying results for which you may be responsible.
- _____ 4. Review the delegation process and what has been learned.

POTENTIAL DELEGATES

Project: _____

Knowledge/Skills/Experience Required: _____

Name	Skills Needed		Can Be Trained		Has Time to Train	Other Priorities		Available Time	Level of Support Needed from me (Scale: 1-5)
	Has	Doesn't Have	Yes	Not Now		Can be Shifted	Can't be Shifted		