Delegation Checklist

* At outset, clearly and thoroughly communicate what you expect, outcomes you seek (quality, quantity), set time frames and goals.
* Clarify: deadline; budget; resources they get; decisions they can make; checkpoints along the way; sequencing of work; how will you measure success; how you will both know when the task is done.
* Anticipate steps needed to proceed and problems ahead of time so you avoid rework. Make a list of all steps.
* Confirm they have the skills to do it. If not, train them.
* Set expectation that questions will be asked openly and often.
* Set feedback loops to assure mid-course correction.
* Tell them the “what and why” to make the work more motivating and interesting. Leave as much of the “how” up to them as possible.
* TELL THEM WHAT YOU NEED IN ORDER TO KNOW THE WORK IS BEING DONE RIGHT. ESTABLISH AND AGREE TO THIS PROCESS.
* Monitor progress via agreed-on process:
	1. By the calendar
	2. By tasks completed
	3. By outcome

Make a Delegation Plan

**Identify a big task you are going to delegate, and the staff member to whom you will delegate it.**

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**Describe the tasks and the outcomes you seek.**

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**Steps needed and sequencing of work:**

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**Pre-Mortem: Anticipate challenges and problems ahead of time to avoid rework. Identify helpful documents and people.**

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**Checkpoints/feedback loops along the way: set time-definite checkpoints:**

* **by the calendar – every Monday**
* **by tasks completed**
* **by outcome – e.g., first draft**

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**Set a Deadline and Timeframe.**

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**Budget: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

**Decisions they can make:**

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**Decisions they cannot make:**

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**How will you measure success?**

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**How will you both know when the task is done?**

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**Confirm they have the skills to do it. Do you trust this person to do the work? If not, identify the exact source of the hesitation.**

What skills, experience, or judgment might the staffer lack to take on this task?

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**Are they real or perceived deficits?** \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

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**How can you address deficit areas in your staffer? What training will you and others provide?**

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**Do you trust the staffer to ask questions when needed?** \_\_\_\_\_\_\_\_\_\_\_\_\_\_

If not, is this something you can resolve with them? How will you do this? \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**WHAT DO YOU NEED IN ORDER TO KNOW THE WORK IS BEING DONE RIGHT? ESTABLISH AND AGREE TO THIS PROCESS**

**Exactly when, where, and how will you check in to assure it is progressing well? Options:**

* Calendared phone or in-person check-ins
* Email notifications when specific items have been achieved
* Copies of documents
* PM tool
* Make your own