

Delegation Toolkit

Empowerment is the act of giving your employees the latitude to accomplish tasks, achieve objectives, and make decisions using their own abilities.

As a leader, this means giving employees the tools that they need to use their own skills and abilities to perform to the best of their ability.

The following chart displays some key ideas regarding what empowerment is and what it is not.

Disempowering Leaders	Empowering Leaders
"Because I am the boss, I am the expert."	"You know more about the job than I do."
"I have all the skills."	"You have some skills; I have some skills; let's pool our knowledge."
Use top-down communication.	Use two-way communication.
Tell others what to do.	Provide support and encouragement.
Are critical of how people do things and provide minimal or no feedback.	Provide clear performance expectations and timely feedback.
Micro-manage people.	Manage processes and workflow.
Knowledge is power, so I am keeping it.	Knowledge is power, so I am sharing it.
Assume they know the right way; they are the ones with the right answer.	Encourage group members to solve problems and ask other team members for suggestions.
Make decisions alone.	Share decision-making with the team.

Do You Need to Delegate More?

Individual Instructions

Complete the following self-assessment by marking yes or no for each question.

Yes	No	Delegation Questions
		Do you often take work home?
		Do you find yourself rushing to meet deadlines?
		Are you frequently interrupted for advice and information?
		Do you keep your hands on too many projects?
		Do you spend too much time on details rather than department planning and employee development?
		Do you spend time doing tasks for others that they could or should be doing themselves?
		Do you find yourself becoming involved in projects that you thought you had delegated to someone else?
		Is there a lot of work that requires your immediate attention and action after you return from an absence?
		Does your department operate as smoothly when you're away as when you're present? (Do you believe that you do not have to call your staff frequently when you are out of the office?)
		Do you have at least one staff member who could step in and do your work if you had to be out of the office for a long period of time?
		Do you communicate clear goals, performance measures, and feedback when you delegate assignments? In other words, does your staff understand your expectations and priorities?
		Do you know the goals, knowledge, skills, and abilities of each of your employees?
		Do you provide training, coaching, and challenging assignments to develop each of your employees?
		Do you consistently recognise and reward your employees' performance when they perform well?
		Do you follow up when you delegate?

Scoring: If you are delegating appropriately, your answers to the first eight questions will be "no," and your answers to the last seven questions will be "yes." What do your responses tell you about your opportunity for delegation?

Six Steps of Effective Delegation

Use the following six steps when delegating a task or project.

1. Identify and overcome your own resistance to delegating.
2. Determine a task that could or should be delegated.
3. Select an appropriate person to whom you can delegate the task.
 - Consider the readiness of the employee.
4. Set a time and a place for having the discussion with the employee about the task.
 - This period of time should be uninterrupted so that you can focus on the delegation process.
 - This environment should be one in which the employee feels free to express concerns, provide insights, and ask questions.
 - Goals, boundaries, opportunities, and concerns regarding the task should be discussed systematically.
5. Implement the delegation process.
 - Provide the appropriate amount of task and relationship behavior depending on the employee's ability and willingness to do the task.
6. Follow up.
 - Follow up periodically on task progress and alignment.
 - Adjust your delegation style over time, increasing or decreasing the amount of direction and supportive behavior as appropriate.

Step 1: Overcome Resistance

Read the reasons why leaders resist delegation. Mark the two that are most true for you.

- I hate dumping jobs on people who are already too busy.
- My boss might think I'm lazy—that I'm not doing anything.
- I'm more of a "doer" than a delegator, and I like doing these things. I'm not sure I'd have a sense of achievement doing new, unfamiliar work.
- Doing it myself gives me exposure, and I like the recognition.
- My boss told me to do this task.
- I can do this better than anyone else—I have the most experience.
- It's just a habit—I do it almost before I realise it.
- I don't know my employees well enough to know who could do other jobs.
- I am confident that if I do the task it will be done right.
- There's no time to delegate. I need results quickly, so it's easier to do the task myself.
- If I delegate too much and people develop key skills, my own job might be in jeopardy.
- My employees don't have the information I have to make decisions.
- I don't know how to delegate in a way that's effective and efficient.
- The company culture doesn't encourage delegation.

Step 2: Determine a Task to Be Delegated

The first step in delegation is to identify tasks that should be delegated. For each task, decide whether you should do it yourself, delegate the task, or drop the task.

The Delegation Decision

Do It: You should do the task yourself when:

- It is a once-in-a-great-while task and it would take longer to delegate the task to someone else rather than to do it yourself.
- It involves:
 - Disciplining an employee.
 - Recognising an employee.
 - Dealing with confidential information.
- It is a strategic planning task or other task that is truly the manager's responsibility.

Delegate It: You should delegate the task when:

- It is a repeat task. It will save time in the long run if you teach someone else to do it.
- Someone else has the potential to do the job better because he/she is closer to the customer, product, or service.
- You want to develop employees' skills.
- Your time is better spent doing other things that are truly the responsibility of a manager and that other people cannot do.

Drop It: You should drop the task when it does not add value to the organisation.

Step 3: Select an Appropriate Person

Successful delegation requires selecting the right person to complete the task for the right reasons. There are many considerations for selecting the right person to whom to delegate a task. The person who can do the task the fastest is not always the person to whom you should delegate.

Considerations for selecting the right person include:

- Who needs a developmental assignment?
- Who needs to develop the skills that this assignment requires?
- Who is personally impacted by this assignment and will have ownership over implementing the results?
- Who has been doing the same tasks over and over and might need a new assignment?
- Who has the skills that are required for the task? How important is it that he/she already has the skills versus developing the skills as he/she completes the assignment?
- Who has the time available to complete the task in the allotted time? Should I adjust someone's schedule so that he/she does have the time?
- Who is the most interested? Do I know the interests and motivations of all my team members?
- Who needs to develop the technical skills that this assignment might teach?
- Who needs to develop the interpersonal skills that this assignment might teach?
- If it is a fire-fighting assignment and needs to be done fast and efficiently, who can do it best?

Step 4: Set a Time and a Place

Set a time frame that will allow for discussion and questions. Meet in a location that is convenient for both parties.

Step 5: Implement the Delegation Process

A—Describe the Task

When describing the task, use the task assignment worksheet.

B—Gain Understanding

At this step, the delegatee may not be committed to the task; however, it is important that he/she understands the importance and expectations of the task. Gain his/her understanding of the task by asking for feedback on what you have just described.

“Just to be sure you understand what I’ve just described, let’s review what you’re going to be doing on the task. What’s your understanding of the expectations?” “first step...?” “timelines...?” “etc....?”

C—Discuss Questions and Doubts

Discuss questions and doubts by listening carefully and responding realistically. Ensure that the delegatee knows that he/she can come to you at any time to ask clarification questions or to express doubts. Initiate discussion by asking open-ended questions:

- What might be most difficult in completing this task?
- What obstacles do you think you will encounter?
- What are you most concerned about in completing this task?
- What will be the toughest part of this task for you?
- What skills, abilities, and knowledge will support you most in completing this task?
- What do you need from me to complete this task?

D—Gain Commitment and Agree on a Follow-Up Time and Date

It is important at this stage that you gain commitment for the completion of the task. Pay attention to body language and tone of voice. Make it clear that you expect the delegatee to use his/her own initiative when appropriate, and ensure that there are no doubts about the extent of his/her authority. Discuss the following areas to ensure complete commitment:

Reprioritising or reassigning the employee’s current workload if needed.

Deciding what, if any, additional training or support might be needed.

The best place to discuss the follow-up that is needed is at the delegation meeting. Discuss how and when follow-up will be conducted and the format that is to be used for reporting progress. If during the completion of the task you discover that more or less follow-up is needed, discuss this point with the delegatee:

- Agree on follow-up methods and frequency.
- Agree on a method of reporting progress and how often the method should be used.

Delegation Meeting Checklist

Below is a list of questions to answer when discussing a delegated task.

1. **Clear goals.** What is the overall task?
2. **Task meaningfulness.** Why is this task important to the goals of the department, the organisation, and the employee's development?
3. **Performance boundaries.** What are your expectations in terms of measurable results (quality standards, performance measures, feedback mechanisms, and deadlines)?
4. **Constraints.** What are the constraints in completing the task (e.g., budget, process)?
5. **Authority.** How much authority will the employee have to determine how the task will be done, who will be involved, etc.? Are changes and improvements welcome?
6. **Task guidelines.** Provide step-by-step instructions for completion of the task if necessary.
7. **Interdependencies.** Who else will be involved in this task and with whom should the employee coordinate?
8. **Advice.** What are some tips and techniques for succeeding in the task?
9. **Potential problems.** What could go wrong or has gone wrong in the past? What should the employee do if something goes wrong?
10. **Employee input.** Does the employee have any recommendations to improve the process? Any concerns (e.g., obstacles)?
11. **Support.** What kind of support does the employee need from you (e.g., training, coaching, relief from some current responsibilities)?
12. **Follow-up.** How and when will follow-up occur? Does the employee have any recommendations for the follow-up process?

Step 6: Follow-Up

Follow-up is an important part of task assessment. When following up, one or more actions may be needed:

- Provide constructive feedback.
- Provide recognition.
- Provide more support and information about the task and the results expected

If you, as the delegator, are presenting the finished task, consider involving your delegatee and emphasising his/her contributions. A delegator who takes little interest in a task and assumes the majority of the credit is guilty not only of bad management, but also of bad manners.

Recognition for a well-done assigned task is important for several reasons: recognition builds confidence, shows appreciation, increases motivation, and encourages future achievements. Recognise the effort that was put into the task as well as the results. When providing recognition to the delegatee, consider the following steps:

1. Describe specifically what is being recognised.
2. Describe the impact.
3. Thank the person.

Principles of Delegation

Be Fair

- Give all employees the opportunity to contribute their best work to the organisation, to develop new skills, to gain confidence, and to increase their career potential.

Know Your Employees

- Know the ability and willingness of all of your employees, as well as their developmental goals.

Ensure that Employees See Delegated Tasks as a Step Forward

- Explain the developmental benefits of learning and performing new tasks.

Communicate Clear and Engaging Goals

- Clearly communicate the expected results, the quality standards, and the time constraints. Explain the relevance of the task to the goals of the department, the organisation, and the employee's development.

Communicate Clear Rules

- Clearly communicate the accountability process, including performance standards and feedback mechanisms.

Give Authority

- Give sufficient authority to the employee.

Follow Up and Provide Support as Needed

- Provide an appropriate amount of technical and psychological support based on the employee's willingness and ability to complete the task independently.