THE ART
OF
DELEGATION
DELEGATING TO OTHERS
Delegating to Others

Definition of Delegation

Delegation – the transfer of an activity while retaining accountability for the outcome.

This could include:

- Your employees
- Employees in other departments and CSCs
- Peers
- Contractors
- Anyone else who doesn’t work for you

‘Whys’ and ‘Why Nots’ of Delegation

Why should we delegate?

Why don’t we delegate?

What are the consequences of not delegating?

Rule of Thumb – the less you know (about the employee) the more time you need to spend following this delegation model
• Skills needed?
• Who has (or would like to have) these skills?
• Does the deadline support someone new?
• How will the employee benefit from doing this task?

**Discuss**
- Final outcome and client expectations
- Budget – both time and money
- [ ]

**Notes:**
- Allow the employee to work on the task
- He/she may not do it

**Review**
- Evaluate the project outcome
- Exchange feedback

**Covered for sample**

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Who’s my Resource?

These employees are all Investment Employees who have the technical skills and safety requirements to do your task. Each would do a great job in his/her own way. It’s your decision to select the one who is best for your task.

<table>
<thead>
<tr>
<th>Elaine</th>
<th>Dave</th>
</tr>
</thead>
<tbody>
<tr>
<td>Elaine is a statistics person. She wants to know as much about a project as possible and is seen as a perfectionist.</td>
<td>Dave is a no-nonsense person who is straightforward and matter of fact. He communicates with the least words possible and doesn’t like to chit-chat.</td>
</tr>
</tbody>
</table>

Elaine doesn’t like to make quick decisions and often agonizes over the best way to accomplish tasks. This sometimes means she has less time to do the task itself. It is an area she has committed to improve before her next evaluation session.

When learning to do something new, Elaine often asks for books and articles that she can read about how to be successful.

<table>
<thead>
<tr>
<th>Bill</th>
<th>Mary</th>
</tr>
</thead>
<tbody>
<tr>
<td>Bill is a by-the-numbers kind of guy. He follows established procedures whenever available and looks for the ‘right way’ to do things. It drives him crazy when people don’t follow the rules. Bill is very organized – a file for everything and everything in its file. He is very thorough, reading everything that has gone on with projects he works on. As a project manager, his implementation is usually on time and on budget, no more, no less. Bill is in the office at 7:30 and leaves at 5:00 and needs advanced notice to change his schedule. If Bill needs to learn something new, he prefers step-action tables and structures assignments.</td>
<td>Mary is an extravert who loves the part of her job where she gets to schmooze with people. Her ability to get things done seems to come from her skills as a people-person (asking the right questions, negotiating, etc.). Mary is very intuitive and her enthusiasm is very contagious. She works very hard to make sure that everyone feels good about the decisions that are made. Mary learns best by working with a group and discussing how to best do something. On her last annual evaluation, Mary told you she was going back to school for her PhD. She needed to be in class every Tuesday and Wednesday nights, and asked you to not ask her to work on weekends (the only time she could work on her dissertation).</td>
</tr>
</tbody>
</table>

Covered for sample
### Delegation Process - Questions and Tips

<table>
<thead>
<tr>
<th>Evaluate the task and resources</th>
<th>Use these questions as you evaluate</th>
</tr>
</thead>
<tbody>
<tr>
<td>- What skills are needed to do the job right?</td>
<td>- Who has the skills now?</td>
</tr>
<tr>
<td>- How essential is the task?</td>
<td>- Who has done this task for you in the past?</td>
</tr>
<tr>
<td>- How close is the deadline?</td>
<td>- Who would you like to have the experience or build the skills required?</td>
</tr>
<tr>
<td>- Are there special safety requirements?</td>
<td>- Who would be most efficient?</td>
</tr>
<tr>
<td>- Are there technical requirements?</td>
<td>- Why would it be a benefit to the person you select?</td>
</tr>
<tr>
<td>- Is it a task that will be repeated in the future?</td>
<td>- Are the risks of delegating this task/project?</td>
</tr>
<tr>
<td>- Would it be seen as an opportunity to grow and develop?</td>
<td>- flexibility is built into the timeline?</td>
</tr>
<tr>
<td>- Is it a task that will be repeated in the future?</td>
<td>- How do we communicate?</td>
</tr>
<tr>
<td>- Would it be seen as an opportunity to grow and develop?</td>
<td>- Why did you pick me?</td>
</tr>
<tr>
<td>- Who has the skills now?</td>
<td>- What benefits will I get?</td>
</tr>
</tbody>
</table>

### Covered for sample
**Delegation Process - Questions and Tips (continued)**

<table>
<thead>
<tr>
<th>If Your Concern is:</th>
<th>Just Remember:</th>
</tr>
</thead>
<tbody>
<tr>
<td>Let resource work on the project</td>
<td>If the end product will be the same, on time, and on budget, it shouldn't be a problem; we learn best by doing. Besides, you never know what you might learn!</td>
</tr>
<tr>
<td>I still don't trust that the task is getting done</td>
<td>Schedule additional feedback sessions; once you see the job is being done, you can reduce the number of sessions.</td>
</tr>
<tr>
<td>As the work is being done!</td>
<td></td>
</tr>
</tbody>
</table>

**Feedback loop**

Ongoing feedback and direction is important to the success of the task and the person completing the task. Missing this step can spell disaster.

**Discuss and plan during feedback**

Feedback sessions must be scheduled.

- Changes to the final outcome
- What concerns or issues are there that you can help with?
- Are there obstacles being encountered?
- What lessons have been learned?
- Is the task on track to be completed on time and on budget? Why, why not?
- Is the resource sticking to his/her plan?
- Are there techniques you know that might help?
- Does the resource need help?

**Covered for sample**

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**Finish the task or project**

Once the project/task has been completed, take some time for R & R (review and recognize):

- Review
- Evaluate the outcome and the process
- Provide feedback to each other – what went well, what could be better next time?

**R&R costs little but is priceless**

- Recognize
- Thank and reward
- Share the success

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