

Delegation Checklist

By Campbell Rodriguez

- ☐ Preparation Phase
 - ☐ Determine the goal of delegation.
 - ☐ Define what powers are due to be delegated and why.
 - ☐ Decide to whom the task will be delegated.
 - ☐ Delegate according to the person's ability and skill level.
 - ☐ Notify the employee of future delegation beforehand.
- ☐ Planning Phase
 - ☐ Explain the reasons for delegating to this person.
 - ☐ Describe the project clearly , including how the project fits into the larger scheme of things.
 - ☐ Ask the employee to prepare a plan of how to accomplish the job.
 - ☐ Establish a meeting time to discuss the employee's ideas.
 - ☐ Arrange for the meeting to take place in a nonthreatening location.
- ☐ Discussion Phase
 - ☐ Have a conversation with the employee and review the project objectives.
 - ☐ Precisely explain the employee his new duties and rights.
 - ☐ Explain what the results should look like.
 - ☐ Discuss ideas on how he or she plans to proceed.
 - ☐ Listen to the employees questions and requests.
 - ☐ Specify the resources that will be made available
 - ☐ Tell the employee how much authority he/she will have.
 - ☐ Discuss how much follow-up to expect.
 - ☐ Emphasize the employee's responsibility for the outcomes.
 - ☐ Make written confirmation in which terms and responsibilities are determined.
 - ☐ Provide the employee with all necessary documents.
 - ☐ Prepare the form of delegation.
- ☐ Audit Phase
 - ☐ Make it clear to others what had been delegated and the authority the person has.

- ☐ Agree to progress checks.
- ☐ Check progress at agreed-upon intervals.
- ☐ Provide support if required.
- ☐ Give feedback, both motivational and developmental.