

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.