Delegation Worksheet

A preparation tool for project leaders and managers to set people up for success

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| **I am assigning** | [name] | **the responsibility of** | [project] |

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| Step 1: Getting Clear on Your Expectations (the 5 W’s and how) | | | | | |
| *We sometimes call this part* ***The 5W’s*** *(what, why, where, when, who). Always discuss your thinking with your staff member or team, seek perspective, and check your* [*PTRs*](https://www.managementcenter.org/article/thats-how-weve-always-done-it-a-guide-to-using-ptr/) *before you delegate.* | | | | | |
| Begin at the end: **What** outcomes are you looking for? What would success look like? How will you make the implicit explicit? | | | | | |
| **Why** is this task important? Why X [name of staff person]? Why this? Why now? | | | | | |
| **When** does it need to be completed by? What are benchmarks along the way? | | | | | |
| **Where** else can they go for resources, examples, or advice? | | | | | |
| **Who** else should be involved? The MOCHA for this task is: | **Manager** | **Owner** | **Consulted** | **Helper(s)** | **Approver** |
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| Are any specific approaches (mindsets, values, etc.) needed for this assignment? *Remember to distinguish requirements from preferences or traditions.* | | | | | |
| How will you seek their perspective and adapt to input? | | | | | |
| Howwill you make sure you and your staff member are aligned on key points and next steps?   * Verbal repeat-back * Written repeat-back * Other (specify): | | | | | |

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| Step 2: Stay Engaged | | |
| *What specific products or activities (e.g., outlines, data, drafts, etc.) will you want to review or see in action to monitor progress?* | | |
| **Early Slice** | **Midstream** | **Back End** |
|  |  |  |
| *Date:* | *Date:* | *Date:* |

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| Step 3: Debrief |
| *Create a plan for accountability and learning—yours and theirs.* |
| When and how will you [**debrief**](http://www.managementcenter.org/resources/debriefing-template/) how things went? What **questions** will you ask? What **feedback** will you seek or offer about what went well and what could be improved? |

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| Step 4: Adapt Your Approach |
| *Given the difficulty and importance of the task and my staff member’s will and skill for this project or assignment, my approach should generally be:* |
| * Very in the mix * In the mix * Mostly out of the mix |