

S3 Delegation Canvas

rev. 2023-12-04

The S3 Delegation Canvas is a tool for negotiating and clarifying the delegation of a domain to a team or an individual. Sections are numbered to indicate the suggested order of moving through the canvas.

The Delegation Game: a simple and fun activity for defining and delegating a new domain, or for developing shared understanding and revealing misconceptions about an existing domain. To play, gather those delegating the domain (e.g. a manager) and those the domain is delegated to (e.g. somebody in a role or position, or the members of a team). Set a timer for 15 minutes and have each participant fill in their own copy of the canvas, then go through the canvas section by section, compare notes and agree on the details of the domain.

<h2>Purpose</h2> <p><i>What's the primary driver and the associated requirement this team (or role keeper) is responsible for taking care of in the organization?</i></p> <ul style="list-style-type: none"> Why does the team/role exist? What is the organizational need it responds to? 	<h2>Key Responsibilities</h2> <p><i>What is the essential work and decision-making being delegated to the team (or role keeper)?</i></p> <ul style="list-style-type: none"> list at least the top three responsibilities describe them in a way that enables measuring success 	<h2>Customers and Deliverables</h2> <p><i>Whom does this team (or role keeper) deliver value to, and what specifically do they provide?</i></p> <ul style="list-style-type: none"> List all relevant internal and external customers who depend on, or benefit from the value provided by this team (or role keeper). Include both customers and users (if there is a difference). Start with a sentence or two about each deliverable, explaining what it is and why it is valuable to the customer, and then add more details if helpful. 	
<h2>Dependencies</h2> <p><i>Who is the team (or role keeper) dependent on, from other parts of the organization or the outside world, and what deliverable(s) do these people provide?</i></p> <p>List key dependencies – the products, services, information etc. essential to the work of the team/role – both from within the organization and from the outside world. Describe who provides them, and clarify expectations about the delivery if helpful.</p>	<h2>External Constraints</h2> <p><i>What are important external constraints to the team's (or role keeper's) autonomy and influence?</i></p> <p>Constraints may be related to customer requirements, to the outside world, to essential stakeholders in the organization, to shared resources, to other responsibilities the members of the team or person in the role may have, or to the preference of the delegator.</p>	<h2>Key Challenges</h2> <p><i>What are the most important known (or anticipated) challenges the team (or role keeper) might face?</i></p> <p>Consider the outside world, the organization itself, the delegator and the members of the team, or person in the role. Look for risks, vulnerabilities, variables, uncertainty, complexity, and lack of skills or resources.</p>	<h2>Key Resources</h2> <p><i>What are essential resources the team or role keeper can make use of?</i></p> <p>Examples: time allocation, supply of money, privileges and permissions, facilities, hardware, software, materials, internal or external service providers, products, stock, etc.</p>
<h2>Delegator Responsibilities</h2> <p><i>What responsibilities can the team (or role keeper) rely on the delegator to take care of to support them to successfully account for this domain?</i></p> <p>Responsibilities should be specific and measurable, so they can be reviewed and developed over time.</p>	<h2>Competencies, Qualities and Skills</h2> <p><i>What competencies, qualities and skills are required – or at least preferable – to successfully achieve the purpose of this domain?</i></p> <p>Consider what you listed as Key Responsibilities, Key Deliverables and Key Challenges.</p>	<h2>Key Metrics and Monitoring</h2> <p><i>What are the critical indicators of progress, performance, project health, etc, how frequently will they be measured and by whom?</i></p> <p>Define simple and specific metrics that enable you to monitor progress and effectiveness, as well as to spot potential issues or opportunities as they arise. Specify when or how frequently key metrics will be checked, and by whom.</p>	<h2>Evaluation Schedule</h2> <p><i>When and how will you evaluate the effectiveness of the domain's design and the success of the team (or role keeper) in fulfilling the domain's purpose?</i></p> <p>Describe a schedule (or frequency) for evaluating the success of the team (or role keeper), the process used, and who should take part in which parts of the evaluation.</p>

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Purpose		Key Responsibilities		Customers and Deliverables	
Dependencies		External Constraints	Key Challenges		Key Resources
Delegator Responsibilities		Competencies, Qualities and Skills		Key Metrics and Monitoring	
				Evaluation Schedule	

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<div><div>1</div><div>Purpose</div><div>Explain the purpose of the team/role in the organization, clarify the organizational need it responds to.</div></div>		<div><div>2</div><div>Key Responsibilities</div><div>Clarify at least the top three responsibilities (i.e. objectives, essential work and decision-making being delegated), preferably with a measurable outcome for each one.</div></div>		<div><div>3</div><div>Customers and Deliverables</div><div>List all relevant internal or external customers who depend on, or benefit from the value the team/role delivers. Describe the deliverables (products, services, experiences or transformations) the customers receive.</div></div>			
<div><div>4</div><div>Dependencies</div><div>Describe who provides products or services that are essential to the work of the team/role, and include reasonable expectations about the delivery if helpful.</div></div>		<div><div>5</div><div>External Constraints</div><div>List at least three important constraints to the autonomy and influence of the team/role (e.g. decisions requiring authorization; legal, time or budget constraints; audits; expected reports).</div></div>		<div><div>6</div><div>Key Challenges</div><div>Identify at least three important known (or anticipated) challenges for the team/role. Consider the outside world, the organization itself, the delegator and the specific delegatee(s). Look for risks, vulnerabilities, variables, uncertainty, complexity, and lack of skills or resources.</div></div>		<div><div>7</div><div>Key Resources</div><div>List essential resources the team/role can make use of, e.g. time allocation, budget, privileges, facilities, hardware, software, etc.</div></div>	
<div><div>8</div><div>Delegator Responsibilities</div><div>What is the delegator's contribution to the success of the team/or role? Responsibilities should be specific and measurable, so they can be reviewed and developed over time.</div></div>		<div><div>9</div><div>Competencies, Qualities and Skills</div><div>What competencies, qualities and skills are required – or at least preferable – to successfully achieve the purpose of this domain? Consider what you listed as Key Responsibilities, Key Deliverables and Key Challenges.</div></div>		<div><div>10</div><div>Key Metrics and Monitoring</div><div>List at least three critical indicators of progress, project health or performance related to purpose, responsibilities, challenges, deliverables or delegator responsibilities. Define specific targets or acceptable range of tolerance.</div></div>		<div><div>11</div><div>Evaluation Schedule</div><div>Define when the key metrics will be checked, and who will do it. Agree on a schedule for evaluating the success of the team/role, any evaluation criteria in addition to the key metrics, and any other relevant aspects of the evaluation.</div></div>	

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