

DELEGATION SKILLS CHECKLIST

- ☐ Analyze tasks to identify what can/cannot be delegated.
- ☐ Analyze the team to see what their strengths and development areas may be, and which tasks could be delegated to which team member.
- ☐ Match the right task to the right person.
- ☐ Determine the authority level that should be assigned.
Match authority to the task AND the person.
- ☐ Communicate the delegation.
- ☐ Follow-up. Identify what worked well, and what could be improved in the future.

SELECT THE TASK

Decisions you make most frequently

Minor decisions and repetitive routines. Can someone else be taught the policies and procedures that apply to these decisions?

Functions that are in your technical or functional specialty

Operating, functional tasks (i.e. Data entry, material prep). Can others be taught how to do this?

Tasks and projects for which you are least qualified

One of your research assistants, graduate students, or lab managers may be better qualified than you to do this task.

Functions you dislike

One of your research assistants or students may like this task and may do it well, or they may need a bit of training.

Opportunities to use and reinforce creative talents

Someone may be especially talented in an area. Can you leverage their skills?

Work that will provide experience for your team

What tasks will provide growth in their present job? What tasks will provide a challenge and motivation?

Assignments that will add variety to routine work

What tasks will provide a change of pace for the graduate students/research assistants/lab managers? (ex. instrument operation, material preparation)

Activities that will make a position more complete

What complementary duties and responsibilities will give your students' and research assistants' positions more substance?

Tasks that will increase the number of people who can perform critical assignments

Cross-training the people in your team ensures that someone can always perform a critical function, and that productivity will not stop because of an emergency.

Tasks that will offer grad students, research assistants, etc. the opportunity to collaborate with various faculty

This is a chance to put the spotlight on high-potential individuals and the quality of the staff being developed on your team.

From the worksheet you have completed above, identify the task you would like to delegate.

TEAM ANALYSIS – STRENGTHS AND DEVELOPMENT (from Jhana Education, Inc. 2017)

	Name:	Name:	Name:	Name:	Name:
Team Member					
What are their strengths?					
What are their key areas for growth and development?					
What are they interested in or motivated to do?					
How is their current workload?					

SELECT THE PERSON FOR THE TASK

Task/Project Identified:

Does the work belong to a particular position? Will the task fit with existing duties or credit assignments?

Who has the interest and/or ability?

Is someone interested in this task and has the necessary skills? Do they show interest but need some additional training?

Who will find the work challenging?

Who is showing signs of boredom and needs a challenge to motivate them?

Who will the assignment stretch and help grow?

Who would benefit from learning or developing a new skill?

Who has been overlooked when you have delegated in the past?

Who has been untested?

Who has the time?

Does someone have a lighter workload? Be mindful of possible time restraints of your team members.

Who is being prepared for a new assignment or opportunity (i.e. 1st author, conference presentation)?

Will this task help the team member with their career planning/growth?

From the worksheet you have completed above, choose the person you would like to delegate your chosen task to.

ASSIGN AN AUTHORITY LEVEL

Level	Assignment	Reason
1	Look into the situation. Get all the facts and report them to me. I'll decide what to do.	The team member is new to the job/task. The supervisor retains control of the outcome.
2	Identify the problem. Determine the alternative solutions and the pros and cons of each. Recommend one for my approval.	The team member is being developed. The supervisor wants to see how they approach problems and make decisions.
3	Examine the issues/solve the problem. Let me know what you intend to do, but don't take action until you check with me.	The supervisor has confidence in the team member, but wants a final check before action is taken.
4	Take action on this matter and let me know what you did.	The supervisor has full confidence in the team member and doesn't need to be consulted before action is taken. They want to know the outcome.
5	Take action. No further contact with me is necessary.	The team member has full authority to act and doesn't need to report the results back to the supervisor.

For the **task** and the **person** selected what level of authority will you choose?
Why?

COMMUNICATE THE DELEGATION

- ☐ Explain the task to the team member. What is the context/the why? What is the big picture? What are the expected outcomes?
- ☐ Time frames - Are there requirements? Is there room for discussion/collaboration on what is reasonable?
- ☐ What special training does the team member need to be successful? How will they get the training/skills they need? What is the time frame?
- ☐ What resources are available? Who can they contact? Are there websites, manuals, publications, etc.?
- ☐ How much feedback will you require? How often? In what format?
- ☐ How much authority will they have?
- ☐ Who needs to be notified that a new team member is in charge/involved?

FOLLOW-UP BY:

- ☐ Accepting mistakes and learn from them.
- ☐ Living with differences as long as objectives are met.
- ☐ Not becoming a communication block between the employee and others involved.
- ☐ Monitoring progress, but not hovering.
- ☐ Providing honest feedback.
- ☐ Planning any needed training for the future.
- ☐ Setting reasonable reporting and review schedules. Mutually deciding how often you should meet to discuss progress.
- ☐ Respecting the level of authority given.
- ☐ Recognizing the achievement.
- ☐ Intervening only if absolutely necessary.
- ☐ Asking what kind of support the person would like, and committing to whatever you agree upon.

POST-DELEGATION ASSESSMENT (From Jhana Education, Inc. 2017)

Direct Report:

Task/Project:

Date:

Ask yourself:

What about the work met/did not meet expectations?

What would you do differently if assigning this project again?

Common possibilities:

- Assign it to someone with more competence in the task.
- Assign it to someone for whom the task is more of a developmental challenge.
- Be clearer in describing goal outcomes or expectations.
- Better explain why the task is important for the bigger picture.
- Provide more resources.
- Set a more realistic deadline.

What would you do differently if supporting the person in this project again? Common possibilities:

- Add/remove a level of check-in.
- Devote more time to coaching.
- Give more reinforcing and/or redirecting feedback.

Ask your direct report:

How do you think it went? Why?

What were unexpected roadblocks you encountered along the way?

What could I have done differently to support you during the project?