

Delegation Worksheet

Use this sheet to think through how to set up a successful delegation.

Task Analysis

As completely as possible, describe the task or responsibility to be delegated.

Appointment

Who is the most suitable person for this task? Do they have all the requisite skills and knowledge? How might I need to support them to ensure their success?

Briefing

What background and contextual information do I need to provide for this task? Be sure to include any pertinent constraints, limits to authority, and/or available resources.

Goal

What specific outcomes are needed? What are the relevant standards and expectations? (Be sure to include timelines for progress/completion.)

Control

What should I monitor to be sure the project is going well? How often should we check in? What kind of coaching do I anticipate this person will need? What do I need to let go of in order for this person to feel empowered?

Appraisal

How will I evaluate the results? When and how will I give this person feedback? What rewards/recognition can I offer for a job well done? What will we each hopefully learn/accomplish through this delegation?