

Delegation Agreement

THINK ABOUT THESE THINGS BEFORE YOU DELEGATE.

Have a meeting and convey this information. Ask the person who has been given the assignment to complete this table based on their understanding of your meeting. They submit this for review to be sure you are both clear. AFTER you have clarity here, the delegation is underway.

Topic	What is to be addressed	ACTUAL Delegation Information
What	- What is the work involved - What is the deliverable/output - What key content must it contain - What is the process they must follow or include (meetings, timelines, reports) - What research or input is needed	
Who	- Who needs to be involved for input, information, decisions - Who else is working on this with them	
When	- Due date, completion date - Milestones - Timeline overall - Check in and feedback dates (Each check in includes discussion of what is going well, not so well, what is needed moving forward to be successful)	
Why	- Why is this being delegated to this person at this time? - Is this to help build skills? Meet expanded workload? Help another? - Link to the big picture of “why” this is important to the organization’s strategic goals and priorities	

Topic	What is to be addressed	ACTUAL Delegation Information
Type of Delegation	- Is this a task only? - Is this a project only? - Is this now an ongoing responsibility?	
Expectations	- What are the performance expectations? - Quality - Communication - Timeframe - Other - What to do if problems arise? Inform who and when?	
What Authority Accountability Responsibility Is given?	- What decisions can they make on their own? With others? - What budget in time and money do they have? - Who are they able to contact and involve or not? - What are they accountable for and to whom?	
What is needed to be successful	- What do they need to be successful? - Do they have concerns about being successful with this? If yes, what and what do they need to be successful? - Do YOU have any concerns about them being successful? State them	
How will you support them?	- Indicate how you will support their success (direction or letting them have free rein) - Indicate what they can expect from you	