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# Delegation: The Art of Delegating Effectively, Study Guide, Student Edition

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Authored by: (GTS Learning, 2013)

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# Why Delegate?

## Adapted for learning purposes

### Overview

How do you feel about passing along some of your tasks (even ones that you love to do) in order to have some more time to do the things that you love, while your employees have the opportunity to learn something new?

*In this session*, we'll introduce the idea of why we should delegate by examining advantages and disadvantages.

### More on Delegation

Have you ever looked at the final product of a task you had assigned somebody else and realized you didn't get what you wanted, and you would have to redo it yourself? Initially it may seem like the person who was assigned the task has failed, but that's not really the case. As you learn more about delegation, you may begin to realize it was you as the delegator who failed.

As a supervisor or manager, you will likely always have responsibility for more things than you can handle by yourself. You cannot adequately plan and perform every task. If you feel your employees aren't ready to take on tasks by themselves and you never delegate, they never will be ready.

Added to this mix, we have the dilemma of the new supervisor who isn't confident and sure of their role, and the traditional manager who thinks there is only one right way of doing anything.

### *Delegation Do's and Don'ts*

#### **Things To Do**

- Specify the results expected
- Explain why you are delegating
- Give the necessary authority to carry out the tasks
- Let others know of the delegation
- Have confidence in employees

#### **Things Not To Do**

- Delegate just trivial tasks
- Expect others to do the job as well as you can. They need to learn
- Delegate haphazardly
- Be an autocratic delegate
- Check constantly to see how things are going (micromanaging)
- Take credit for results achieved by staff
- Overload employees

### Self-Assessment

**We can see there are some pretty good reasons for improving our delegation ability. How do you know whether you need help or not? Consider your own role as a manager over the last three months and answer the questions below.**

	Never	Sometimes	Often	Always
I find myself working longer hours than those who report to me.				
I take work home or come in on weekends or days off.				
I have difficulty keeping up with the paperwork associated with my job.				
I end up doing tasks for others that they should do themselves.				
I find myself rushing to meet deadlines.				
I find myself doing a lot of routine or technical tasks.				
I feel as though I'm always under a lot of pressure and stress.				
I find myself making the decisions affecting my work group.				
I don't spend enough time on managerial functions, such as planning work or interacting with people.				
Those who report to me have to seek my approval before they can take an action.				

**On a scale of 1-10 (where 1 is poor and 10 is excellent), how would you rate your ability to delegate?**

## What is Delegation?

### Overview

People delegate all the time. As a child growing up, there were probably tasks you did that were assigned to you by a parent or guardian. As an employee, you probably accept new tasks and assignments.

*In this session, we'll define what delegation is and isn't. We'll also look at guidelines for success as well as the idea of lateral delegation.*

### Delegation Definitions

#### *Defining Delegation*

**What do you think that delegation means?** Is it delegation to assign somebody the work that you don't want to do? Is it delegation to assign work to somebody when you are busy and then to reclaim it again when you have more time?

A common definition of delegation is entrusting power and authority to a person acting as your representative. While that may seem a little abstract, it really captures the meaning well. Another way to define delegation is getting your work done through other people.

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It's more than simply assigning work. Delegation also involves making an investment in a person for the future and helping them to increase their own skills.

**In the broadest sense, delegation involves five things:**

- The training and development of your staff
- The direction and follow-up of assignments
- The analysis of performance problems
- Coaching to overcome problems
- Periodic formal evaluations of performance

*Four Basic Steps to Delegation*



*Deciding What to Delegate*

Part of preparing to delegate is deciding what tasks you can and cannot delegate. Tasks can generally be placed in one of five categories:



*The Five Levels*

Delegation doesn't have to be all or nothing. In fact, you should consider what level of delegation is appropriate for the task, the employee, and the situation.

Here is an overview of the five levels of delegation:





### *Breaking Down the Model*

Let's say that we want an employee to prepare a summary report of their work over the past year that will be submitted to the executive team. How will each level of delegation look?

The **first level of delegation** is to have the employee perform the task exactly as instructed with no independence. In our example, we might give the employee a report template, the data, and similar reports. Then, we'll ask them to complete the report and submit it by a certain date.

The **second level of delegation** is to allow the employee to do some research (if necessary) and then give you options for the task. You make the decision and the employee completes the task according to your instructions. In our example, the employee might research different formats and give you some different options. They may also draft a list of items that they want to include in the report. Then, you will outline the format and contents for them. They will complete the report and submit it by a certain date.

The **third level of delegation** is similar to the second, except that an employee makes a recommendation. Continuing with our report example, the employee would recommend a format and possibly prepare an outline. You would approve it and ask the employee to complete and submit the report.

The **fourth level of delegation** is where independence really comes into play. This is the level that you will use most often once team members get up to speed. With our report example, you would simply ask the employee to complete the report and submit it by a certain date. (They may use existing procedures or templates, but the bulk of the decisions are up to them.) You would then review the report, approve it, and send it to the executive team.

The **fifth level of delegation** gives the employee complete freedom. With our report example, you would ask the employee to complete the report and submit it directly to the executive team. You may ask the employee to send you a copy of the report, but you would not have any active role in it.