Delegation Worksheet

Task:	
Is it:	Ongoing Assignment Temporary Assignment Project
Purpose/Results Intended:	
Goals/Outcomes Intended:	
Lead (Delegatee):	
Timeline:	_____Weeks/Months/Years **Deadline:** / /
Authority:	Elements of influence and authority this team member has to execute and complete this project.
Team Building:	Permission? YES NO Max # of team members? _____ What else?
Team:	If predetermined, list:
Task Management:	In lieu of a formal team building, may this team member "borrow" staff or delegate smaller tasks in the attainment of this goal? YES NO
Budget:	How many hours are expected? _____ Per? _____ How much funding is allocated? $_____ If adjunct, OK to generate OT? YES NO

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	OK to prioritize and take time away from current job description? YES NO
Other:	
Reporting:	How frequently and with what audience do you want your team member/ leader to communicate progress with you?
Format:	Email Video/Chat In Person Phone Webinar Other: _____ Who will attend? 1:1 All Team As team leader sees fit As delegator sees fit TBD? Or List:
Frequency:	Every _____ Days Weeks Months
Check Points/ Milestones:	Are there known milestones that will trigger a need for additional communications or actions?
Other Support:	
Other Resources:	
Task Manager Conclusions:	
Any Next Steps:	

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Considerations

Skills & Knowledge required

- What skills, knowledge, or training does this project or task require to be successful?
- Is any of this trainable? Is training a viable option based on your timeline and other resources?

Competencies required

- What personality traits or social ranking does this project or task require to be successful?

Project/Task – rate it. Consider a 5-point scale.

- Consider its relevance to your company and at what level that influence will be most felt.

Significance to current success of co	Influence on daily activities	Org Level	Potential for co growth

Options for Delegation – Consider a 5-point scale for each of the categories below.

- Based on above sections, list your options for possible team member(s).
- Now consider:
    - Is this lowest you can go in the level of your organizational chart and not foreseeably sacrifice success?
        - You do not want to "waste" resources.
    - Is this a project you could delegate while also helping a team member self develop?
        - Is there someone with potential whose been itching to break out?
        - If this is a possibility, also consider having a conversation with the list of potentials and getting their input.

- Does your delegatee have time to complete this project? Or, are you willing to let them carve it out?
  - Remember that all new projects and tasks take away from current ones.
- Simply, some employees have proven themselves to be more reliable than others. Give this score without bias knowing that that the bias will be applied when considering the significance of the project/task.

Delegatee	Org Level	Potential	Workload	Reliability

Go! And remember, there's nothing you can't learn!

Notes: