

Module 12

Delegation Planning Guide and Worksheet

**Directions:** Successful delegation can be broken down into three major areas: deciding what to delegate, to whom to delegate, and providing guidance. Use the following tools to help your plan for delegating to your team.

**DELEGATION PLANNING GUIDE**

|  |  |  |  |
| --- | --- | --- | --- |
| **Major Responsibilities** | **Not able to delegate**  **(State why)** | **Delegate Now**  **(check)** | **Delegate with training of staff**  **(check)** |
| **1.** |  |  |  |
| **2.** |  |  |  |
| **3.** |  |  |  |
| **4.** |  |  |  |
| **5.** |  |  |  |
| **Minor Responsibilities** | **Not able to delegate**  **(State why)** | **Delegate Now**  **(check)** | **Delegate with training of staff**  **(check)** |
|  |  |  |  |
|  |  |  |  |
| **3.** |  |  |  |
| **4.** |  |  |  |
| **5.** |  |  |  |

**DELEGATION WORKSHEET**

|  |  |
| --- | --- |
| Tasks to be delegated | List the task or responsibility you would like the person/team to handle and why. |
| People/teams who can do the job. | List the people or teams who can currently do the job.  List the people or teams who might be trained to do the job. |
| The work and the authority to be delegated | What are the performance expectations for the task?  What resources are available to employees? |
| Keep in contact | Schedule follow-up sessions.  Provide employees with information. |