



**STATE CIVIL SERVICE**  
COMPREHENSIVE PUBLIC TRAINING PROGRAM

# STRATEGIC DELEGATION

**PARTICIPANT  
TRAINING MANUAL**

REVISED 09/20/2018

# STRATEGIC DELEGATION

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## COURSE DESCRIPTION

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This course helps supervisors use delegation to accomplish tasks, develop employees, and improve their department's efficiency and workflow. This allows a supervisor to focus on the tasks that are priority to the mission of the department. This class is open to all supervisors and managers.

## COURSE OBJECTIVES

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By the conclusion of this session, learners will be able to:

- ◆ Apply the 6 Steps of Delegation to increase efficiency and develop employees.
- ◆ Use tools and techniques to monitor and coach employees on delegated tasks.

## COURSE OVERVIEW

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Delegation is the process of asking another individual to do a task, while still maintaining responsibility for that task.

Strategic delegation takes delegation even further. Instead of assigning tasks based solely on need or who is available, it takes into consideration such concepts as the mission of the department, uninterrupted operations even when select team members are absent, and the development of the skills of individuals in the department.

When done correctly, delegation is not “dumping.” It is an opportunity to improve the department and the skills of its members. It can lessen stress and share workload. And it can create a stronger team as members learn and appreciate the work that others in the department accomplish each day.

The basic concepts you might remember from the web based course are:

- Identify appropriate tasks
- Select the right person
- Develop a communication plan
- Implement a monitoring process

In this session, we'll go into more detail and share a number of tools that will help you make all of your delegation strategic and beneficial to your department.

**What are the challenges that keep you from delegating as often as you would like?**

# STRATEGIC DELEGATION

## ACTIVITY: THE CHALLENGES TO DELEGATION

1. As we introduce ourselves, list the main challenges and concerns that keep us from delegating.
2. Discuss these with your group and see how many potential answers you can create to address these challenges.
3. Be prepared to share your ideas with the rest of us.
4. Keep track of challenges and potential solutions below.

#	CHALLENGE	ANSWERS
1		
2		
3		
4		
5		
6		
7		
8		

# STRATEGIC DELEGATION

## SIX STEPS OF STRATEGIC DELEGATION

#	Step	Notes	Questions To Ask / Actions
1	<b>Analyze the Task</b> <ul style="list-style-type: none"> <li>Overcome objections</li> <li>Evaluate the task</li> <li>Review the risk</li> </ul>		<ul style="list-style-type: none"> <li>How many people can do this task?</li> <li>Why is it important to your team's mission?</li> <li>What is the risk? (Audience, Cost, Timing)</li> <li>What competencies will this help an employee develop?</li> <li>What resources exist to help with this task?</li> <li>Will this task require additional training?</li> <li>How often is this task done?</li> <li>What related tasks do others perform?</li> </ul>
2	<b>Identify the Right Person</b> <ul style="list-style-type: none"> <li>Evaluate the department</li> <li>Determine the best person for the task</li> <li>Rotate assignments</li> </ul>		<ul style="list-style-type: none"> <li>Evaluate your team's current workloads.</li> <li>Which employees know how to do this task?</li> <li>What skills does each employee have that would be helpful in completing this task?</li> <li>What motivation level does each employee exhibit?</li> <li>Who needs to learn this task for career development?</li> <li>Who is interested in this type of task?</li> <li>Is there someone that you have been relying on too heavily for additional tasks such as this?</li> </ul>
3	<b>Communicate Expectations</b> <ul style="list-style-type: none"> <li>Explain the task and success</li> <li>Practice two-way communication</li> <li>Designate authority level</li> </ul>		<ul style="list-style-type: none"> <li>Determine exactly what success in this task looks like using SMART Goals.</li> <li>Practice two-way communication to ensure understanding.</li> <li>Assign level of authority for the project.</li> <li>Implement a delegation log.</li> <li>Set deadlines and meeting dates.</li> <li>Designate resources and coach employee on the use of these resources.</li> <li>Schedule any training needed for the task.</li> <li>Communicate leadership on this task to all stakeholders.</li> </ul>

# STRATEGIC DELEGATION

## SIX STEPS OF STRATEGIC DELEGATION

#	Step	Notes	Questions To Ask / Actions
4	<b>Monitor Progress</b> <ul style="list-style-type: none"> <li>Track progress</li> <li>Review challenges</li> <li>Revise as needed</li> </ul>		<ul style="list-style-type: none"> <li>Hold meetings to monitor progress and address issues.</li> <li>Adjust deadlines as needed.</li> <li>Review delegation log and document changes.</li> <li>Get input from resources as needed.</li> <li>Coach employee on challenge areas and assign additional training as needed.</li> <li>Be available between meetings to address issues that the employee encounters.</li> </ul>
5	<b>Recognize Achievement</b> <ul style="list-style-type: none"> <li>Recognize completion</li> <li>Reward success</li> </ul>		<ul style="list-style-type: none"> <li>Recognize completion of phases of project.</li> <li>Give acknowledgement for achievement.</li> <li>Adjust acknowledgement for employee's preferred method of recognition.</li> <li>Reward success of full task.</li> <li>Ensure that this achievement is noted in annual performance evaluation.</li> </ul>
6	<b>Debrief &amp; Document</b> <ul style="list-style-type: none"> <li>Evaluate the process</li> <li>Document procedures</li> <li>Share knowledge</li> </ul>		<ul style="list-style-type: none"> <li>Have employee refer to the delegation log to list steps, challenges, and recommendations for this task.</li> <li>Evaluate the process and discuss what could be done differently.</li> <li>Document the process in a step-by-step list.</li> <li>Allow the employee to teach the process to others.</li> <li>Include the completed delegation log in the employee's file.</li> </ul>

# STRATEGIC DELEGATION

## COMPETENCY / TASK SKILL LEVELS

NAME	N/A	LOW SKILL	CAN DO	CAN TEACH	MOTIVATED

## RASCI CHART (S - OPTIONAL)

ABC PROJECT	AMY	BILL	CARL	DENISE
Project Action Plan	A	R	S	
Communication Plan	C	A		R
Training Program	A	C	R	S
Evaluation Methods	C	I	A	R
<b>RESPONSIBLE</b> These people are responsible for the task. They create the deliverable.	<b>ACCOUNTABLE</b> This is the one person accountable for the job who will give approval.	<b>SUPPORT</b> These people provide resources, information, or assistance in getting the job done.	<b>CONSULTED</b> We seek this group's opinions before a decision or action.	<b>INFORMED</b> This group gets updates on progress and after decisions or actions.

## LEVELS OF DELEGATION

A	B	C	D	E	F	G
Decide and take action	Decide and take action, but let me know what you did.	Decide and let me know your decision. Then take action unless I say not to.	Decide and let me know your decision, but wait for my go-ahead.	Decide what you do. Tell me the options you considered and the pros and cons of each.	Look into this problem and give me the facts. I will decide how to handle it.	Wait to be told.

# STRATEGIC DELEGATION

## ADAPTED SMART GOALS FOR DELEGATION

SPECIFIC	MEASURABLE	ACHIEVABLE	RESOURCES AVAILABLE	TIME-BOUND

## SAMPLE DELEGATION LOG

TASK/ PROJECT	DELEGATED TO	DEADLINE	FOLLOW UP	DONE

## TRACKING METHODS

METHOD	DESCRIPTION
Calendar	<ul style="list-style-type: none"> <li>Put interim deadlines on calendar and check in on these dates.</li> </ul>
Email	<ul style="list-style-type: none"> <li>Create an email delegation folder. Check frequently to see latest emails on tasks.</li> <li>Add a tag word to all emails for each project for ease of searching.</li> </ul>
Delegation Log	<ul style="list-style-type: none"> <li>Use a log with all projects and tasks and check-in dates.</li> </ul>
Reminders	<ul style="list-style-type: none"> <li>Set up reminders in your calendar program .</li> </ul>
Agendas	<ul style="list-style-type: none"> <li>Have staff members send agendas before check-in meetings.</li> </ul>
Other Ideas	

SAMPLE DEBRIEFING QUESTIONS	
	What are your initial thoughts about the project you just completed?
	What went well?
	What would you do differently next time you did this?
	What individuals served as helpful resources?
	What other resources did you find that supplied useful information for this project?
	Could you list a step-by-step method to do this process?
	Would you feel comfortable teaching this process to others?

# STRATEGIC DELEGATION

## YOUR TEAM

NAME	Description
<b>ABE</b>	<ul style="list-style-type: none"> <li>• Long-time employee</li> <li>• High Work Skills</li> <li>• Low-Medium Motivation</li> <li>• Low Tech Skills</li> <li>• High Organizational Culture Understanding</li> <li>• High Organization Skills</li> <li>• High Time Management Skills</li> <li>• Medium Leadership Skills</li> <li>• Low Project Management Skills</li> <li>• Medium Teamwork Skills</li> <li>• High Customer Service Skills</li> <li>• Medium Workload</li> </ul>
<b>BECKY</b>	<ul style="list-style-type: none"> <li>• 3 year employee</li> <li>• High Work Skills</li> <li>• High Motivation</li> <li>• Medium Tech Skills</li> <li>• Medium Organizational Culture Understanding</li> <li>• High Organization Skills</li> <li>• High Time Management Skills</li> <li>• Medium Leadership Skills</li> <li>• Low Project Management Skills</li> <li>• High Teamwork Skills</li> <li>• High Customer Service Skills</li> <li>• High Workload</li> </ul>
<b>CINDY</b>	<ul style="list-style-type: none"> <li>• 10 year employee</li> <li>• Medium Work Skills</li> <li>• Medium-High Motivation</li> <li>• Medium Tech Skills</li> <li>• Medium Organizational Culture Understanding</li> <li>• Low Organization Skills</li> <li>• Medium Time Management Skills</li> <li>• Low Leadership Skills</li> <li>• Low Project Management Skills</li> <li>• Medium Teamwork Skills</li> <li>• Low Customer Service Skills</li> <li>• High Workload</li> </ul>

NAME	Description
<b>DAVE</b>	<ul style="list-style-type: none"> <li>• 15 year employee</li> <li>• High Work Skills</li> <li>• Medium Motivation</li> <li>• High Tech Skills</li> <li>• Medium Organizational Culture Understanding</li> <li>• Medium Organization Skills</li> <li>• Medium Time Management Skills</li> <li>• Low Leadership Skills</li> <li>• Low Project Management Skills</li> <li>• High Teamwork Skills</li> <li>• Medium Customer Service Skills</li> <li>• Medium Workload</li> </ul>
<b>EMILY</b>	<ul style="list-style-type: none"> <li>• 8 year employee</li> <li>• High Work Skills</li> <li>• High Motivation</li> <li>• High Tech Skills</li> <li>• High Organizational Culture Understanding</li> <li>• High Organization Skills</li> <li>• High Time Management Skills</li> <li>• Medium Leadership Skills</li> <li>• Low Project Management Skills</li> <li>• Low Teamwork Skills</li> <li>• Low Customer Service Skills</li> <li>• Medium Workload</li> </ul>
<b>FRANK</b>	<ul style="list-style-type: none"> <li>• Long-time employee</li> <li>• Medium Work Skills</li> <li>• Medium Motivation</li> <li>• Low Tech Skills</li> <li>• High Organizational Culture Understanding</li> <li>• Medium Organization Skills</li> <li>• Medium Time Management Skills</li> <li>• Medium Leadership Skills</li> <li>• Low Project Management Skills</li> <li>• High Teamwork Skills</li> <li>• High Customer Service Skills</li> <li>• Low Workload</li> </ul>

# STRATEGIC DELEGATION

## YOUR TASKS

- How many people can do this task?
- Why is it important to your team's mission?
- What is the risk? (Audience, Cost, Timing)
- What competencies will this help an employee develop?
- What resources exist to help with this task?
- Will this task require additional training?
- How often is this task done?
- What related tasks do others perform?

NAME	Description
	<ul style="list-style-type: none"> <li>You need someone to take your place at a weekly meeting of a task force to work on an awards program that the department is planning to create. This needs to be someone who understands the organization and has a positive attitude. This person will help to manage the project, but will not be in a lead role. It is a high visibility project that will affect the entire department.</li> </ul>
	<ul style="list-style-type: none"> <li>Your team needs a liaison to the Information Technology Department. They need to have good tech skills and be a good communicator who can help explain what is needed by your department and get along with everyone while helping manage change. This will take a medium amount of time and will be an ongoing role for the department.</li> </ul>
	<ul style="list-style-type: none"> <li>You need to delegate the creation of a weekly project report to one of your team members. This is report goes to 25 members of the project team. It must be done every Friday at 1:00 p.m. and is not a highly visible or urgent task, but it is important for everyone to have the information.</li> </ul>

NAME	Description
	<ul style="list-style-type: none"> <li>You have decided to start a newsletter in your department. You will need someone who has a grasp of the organizational culture and can handle the tech demands of designing an producing a newsletter. The person needs to have a positive attitude. This project will take a moderate amount a time to get started, so it should not be someone who is already overloaded with work.</li> </ul>
	<ul style="list-style-type: none"> <li>You need someone to help create a Customer Service Improvement Team. This person will lead the team in the development of customer service standards and practices. The person needs to understand the organizational culture and have good skills in customer service and teamwork. This is a short-term project and the duties will end once the tasks are complete.</li> </ul>
	<ul style="list-style-type: none"> <li>You need to delegate tracking of transactions handled by your team every week. This will include creating a spreadsheet and inputting the data weekly, emailing to all members of the team and leadership of the department. It must be accurate and delivered in a timely manner.</li> </ul>

# REFERENCES

## RESOURCES

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<b>Delegation</b>	Mackin, Deborah. (February 15, 2014). Delegation: 11 Tips, Tactics, and Tools to Effectively Harness the Power of Your Team. <i>New Directions</i> . Retrieved from: <a href="http://www.newdirectionsconsulting.com/teams2/delegation-11-tips-tactics-and-tools-to-effectively-harness-the-power-of-your-team/">http://www.newdirectionsconsulting.com/teams2/delegation-11-tips-tactics-and-tools-to-effectively-harness-the-power-of-your-team/</a>
<b>How Do I Keep Track of the Work I Delegated?</b>	QuickBase.com (July 8, 2014). How Do I Keep Track of the Work I Delegated? <i>Quickbase.com</i> Retrieved from: <a href="http://www.quickbase.com/blog/how-do-i-keep-track-of-the-work-ive-delegated">http://www.quickbase.com/blog/how-do-i-keep-track-of-the-work-ive-delegated</a>
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<b>RASCI Responsibility Matrix</b>	RASCI Responsibility Matrix. In: <i>ManagementMania.com</i> . Wilmington (DE) 2011-2017, 03/17/2016. Retrieved from: <a href="https://managementmania.com/en/rascli-responsibility-matrix">https://managementmania.com/en/rascli-responsibility-matrix</a>