

DELEGATION

Delegation isn't just a matter of telling someone else what to do. There is a wide range of varying freedom that you can confer on the other person. The more experienced and reliable the other person is, then the more freedom you can give. The more critical the task then the more cautious you need to be about extending a lot of freedom, especially if your job or reputation depends on getting a good result. Take care to choose the most appropriate style of delegation for each situation.

For each example on the next page, the statements are simplified for clarity; in reality you would choose a less abrupt style of language, depending on the person and the relationship. At the very least, a "Please" and "Thank-you" would be included in the requests.

It's important also to ask the other person what level of authority they feel comfortable being given. Why guess when you can get the other person's view? You don't necessarily need to agree, but you should certainly take account of the other person's opinion. Some people are confident; others less so. It's up to you to agree with them what level is most appropriate, so that the job is done effectively and with minimal unnecessary involvement from you. Involving the other person in agreeing the level of delegated freedom for any particular responsibility is an essential part of the 'contract' that you make with them.

Levels of Delegation

Level 1

"Wait to be told." or "Do exactly what I say." or "Follow these instructions precisely."

- No delegated freedom at all.

Level 2

"Look into this and tell me what you come up with. I'll decide."

- This is asking for investigation and analysis but no recommendation.

Level 3

"Give me your recommendation, and the other options with the pros and cons of each. I'll let you know whether you can go ahead."

- Asks for analysis and recommendation, but you will check the thinking before deciding.

Level 4

"Decide and let me know your decision, but wait for my go ahead."

- The other person needs approval but is trusted to judge the relative options.

Level 5

“Decide and let me know your decision, then go ahead unless I say not to.”

- Now the other person begins to control the action. The subtle increase in responsibility saves time.

Level 6

“Decide and take action, but let me know what you did.”

- Saves more time. Allows a quicker reaction to wrong decisions, not present in subsequent levels.

Level 7

“Decide and take action. You need not check back with me.”

- The most freedom that you can give to another person when you still need to retain responsibility for the activity. A high level of confidence is necessary, and you would normally assess the quality of the activity after the event according to overall results, potentially weeks or months later.

Level 8

“Decide where action needs to be taken and manage the situation accordingly. It’s your area of responsibility now.”

- The most freedom that you can give to the other person, and not generally used without formal change of a person’s job role. It’s the delegation of a strategic responsibility. This gives the other person responsibility for defining what projects and tasks are necessary for the management of a particular area of responsibility, as well as the task or project, and how it is to be done and measured, etc. This amounts to delegating part of your job - not just a task or project. You’d use this utmost level of delegation (for example) when developing a successor, or as part of an intentional and agreed plan to devolve some of your job accountability in a formal sense.

Devolve Responsibility

The first step in the process of effective delegation is to devolve responsibility to the individual or team.

Responsibility is transferred to the individual or team in a way that empowers the individual or team not controls them. It should be done in such a way that the individual or team takes ownership for the achievement of the task.

They must clearly understand that they are responsible for the completion of the task and they will be accountable not only for the completion of the task but that it meets the required standards.

Set the Context of Delegation

The context of delegation should be established with the individual or team. The manager should ensure that they understand how the task fits into the large work unit plan and relates to the organisational goals. They should gain an understanding of the importance of the task its relationship with other activities and the expectations of the manager, the organization and other stakeholders.

Establish Clear Objectives and Standards

Clear objectives and performance standards must be established and communicated to the individual or team. They must clearly understand not only the outcome required, but also how it should be achieved and the performance standard the quality of the outcome will be measured against.

Give Formal Authority to act

The individual or team must be given the necessary authority to effectively perform the task. This authority must also be cleared communicated to others to ensure that they get appropriate co-operation from other departments and members of the organisation. The limits of their authority should also be made clear and at what point they should refer back to the manager.

Establish Reporting Structures

An agreed reporting structure must be established as part of the delegation. This reporting structure should ensure progress reports are made so the manager gets forewarning if the individual or team is having trouble completing the task and may need assistance or intervention.

Steps for Successful Delegation

1 Define the task

Confirm in your own mind that the task is suitable to be delegated. Does it meet the criteria for delegating?

2 Select the individual or team

What are your reasons for delegating to this person or team? What are they going to get out of it? What are you going to get out of it?

3 Assess ability and training needs

Is the other person or people capable of doing the task? Do they understand what needs to be done. If not, you can't delegate.

4 Explain the reasons

You must explain why the job or responsibility is being delegated. What is its importance and relevance? Where does it fit in the overall scheme of things?

5 State required results

What must be achieved? Clarify understanding by getting feedback from the other person. How will the task be measured? What will be the criteria that is used to determine if the job was completed successfully?

6 Consider resources required

Discuss and agree what is required to get the job done. Consider people, location, premises, equipment, money, materials, other related activities and services.

7 Agree on deadlines

When must the job be finished? Or if an ongoing duty, when are the review dates? When are the reports due? And if the task is complex and has parts or stages, what are the priorities?

At this point you may need to confirm understanding with the other person of the previous points, getting ideas and interpretation. As well as showing you that the job can be done, this helps to reinforce commitment.

Methods of checking and controlling must be agreed with the other person. Failing to agree this in advance will cause monitoring to seem like interference or lack of trust.

8 Support and communicate

Think about who else needs to know what's going on, and inform them. Involve the other person in considering this so they can see beyond the issue at hand. Do not leave the person to inform your own peers of their new responsibility. Warn the person about any awkward matters of politics or protocol. Inform your own boss if the task is important, and of sufficient profile.

9 Feedback on results

It is essential to let the person know how they are doing, and whether they have achieved their aims. If not, you must review with them why things did not go to plan, and deal with the problems. You must absorb the consequences of failure, and pass on the credit for success.