

Delegation Worksheet

Setting Your People Up For Success

I am assigning _____ the responsibility of _____

Agree on expectations

1. WHAT does success look like on this assignment?
2. WHEN is the project due? How does this fit with other priorities?
3. WHERE might the staff member go for resources?
4. WHY does this work matter, and why is this staff person the one to make it happen?
5. WHO else should be involved?

Manager	Owner	Consulted	Helper	Approver

The MOCHA for this task is:

6. Tips on HOW to do it (if any):
7. How will you make sure you and your staffer are aligned on key points and next steps?
 - o verbal or written repeat-back
 - o project plan
 - o other:

Stay engaged

1. What specific products or activities (e.g., outlines, data, rehearsals, etc.) will you want to review or see in action to monitor progress?
 - o Early on:
 - o Midstream:
 - o On the back end:

Create accountability and learning

1. When and how will you debrief how things went? Can you schedule that now?

Adapt your approach

1. Given the difficulty and importance of the task and my staff member's will and skill for this task, my approach should generally be:

Very hands-on

Moderately hands-on

Relatively hands-off