

Effective delegation



Delegation checklist

Use this checklist to help you think about a task that you're delegating. When you've finished, think about the implications for each answer.

At the end of the checklist use your answers to summarise the task being delegated and describe how you will delegate it.

Why not photocopy this checklist and use it each time you delegate a task?

Task or role to be delegated	✘	✔
Is the task a complete piece of work?		
Is the task a repetitive piece of work?		
Will the task enhance the skills of the person receiving delegated work?		
Will the person be given the authority to successfully achieve the task?		
Does the task have SMART goals?		
Person receiving delegated task	✘	✔
Is the person motivated to take on the task?		
Does the person have the correct skills to take on the task?		
Does the person require additional training to take on the task?		
Does the person have the tools and resources to successfully complete the task?		
Has the task been fully explained?		
Has the duration of the task been agreed?		
Has the importance and relevance of the task been explained?		
Does the person have a named individual who will support them?		

Person delegating the task	✘	✔
Have you explained why the task is important and the benefits to the person of taking it on?		
Has the person been shown how to do the task (with written instructions if necessary)?		
Has the person receiving the task demonstrated that they're competent and confident to take it on?		
Does the person receiving the task have the resources available to them to complete it?		
If authority has been given, has this information been shared with other members of the team?		
Have you built in checkpoints to ensure that the task is being completed correctly?		
Is there a deadline to the task – and has this been shared?		
Has the person had the opportunity to ask questions?		

What sort of task am I delegating?

How am I going to delegate this task?