UNIVERSITY of OTAGO
Te Whare Wānanga o Otāgo
NEW ZEALAND

Learning and Development

Management Fundamentals: Delegation

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Introduction

Within our environments, delegation may be affected by what we do, how we do it and the roles we hold. This booklet is designed as an information source and workbook to support your reflection and to place the information into your context. Some of the information may not apply within your environment or may need adaptation.

The booklet contains links through to online content.

What do you think delegation is or isn't?

One way to refresh your sense of delegation is to test yourself at https://quizlet.com/_8brcu4?x=1qqt&i=2tna5a

You could consider each of these terms and define them yourself. You will find the definitions on the following page.

Accountability	
Authority	
Delegation	
Responsibility	
Outcome	
Work allocation	

Accountability	The person with the authority and responsibility is responsible for reporting and justifying task outcomes to those above them.
Authority	The right to make decisions, carry out actions and direct others in matters related to a position's duties and goals.
Delegation	Delegation involves giving others responsibility and authority to complete some of your work or undertake tasks on your behalf. Delegation is entrusting another person with a **responsibility** for which the delegator remains **accountable.**
Responsibility	The duty to perform the task or activity an employee has been assigned.
Outcome	The desired result and product of the activity.
Work allocation	The manager's responsibility in deciding who in the team will complete particular tasks as per their job description.

Here is a short scenario to demonstrate:

A manager has a regular meeting with colleagues across the division during which they provide a project status update on a divisional project. They are unable to attend a specific meeting and delegate the task to a staff member. They provide them with the background to the meeting and all information that the staff member requires. During the meeting, the delegated staff member provides the participants with a clear and accurate project status update.

- Who held the accountability for the task?
- Who was responsible for this positive outcome?
- Who initially held the authority to provide the update?
- Who had the authority to provide the update in the meeting?
- Why was this delegation and not work allocation?

Why do **you** need to delegate?

There must have been a reason you are interested in this topic:

- You may feel that you have a workload that is negatively affecting your level of quality output.
- You may know that good delegation builds skills knowledge and experience in your team.
- You know that good delegation is part of your role.
- You may be wishing to upskill some of your team.
- A team member may have asked for more responsibility.

The role of a leader and manager is not to undertake all the work oneself. Part of the role includes identifying where to allocate your time and energy, and this requires saying "No" to some activities, and delegating some activities to other people. Delegation can provide the following benefits:

- making your workload more **manageable,** allowing you to get on with the tasks where you add value or that only you can do (read this HBR article for a self-assessment)
- providing time to ensure deadlines are met or that urgent work is completed
- providing a **development opportunity** to the employees to whom you delegate
- **empowering and motivating employees** by showing you trust them to undertake important tasks for which you have responsibility
- gaining a **new perspective or fresh ideas** about your work, as a result of the employee's input.

So why don't you delegate more?

What stops you delegating? Think of two reasons that apply in your situation and note them here.

1.

2.

On the following page are some reasons or management traps that people fall into. Do these match any of your reasons?

Common reasons for not delegating

There are a number of "management traps" with delegation that on occasion we can all be in danger of falling into:

- Belief that there is only one right way: "They won't do it the way I want."
- Control: "I need to be in control, on top of everything." "It's risky. What if they make a mistake?"
- Concern: "They'll think I'm dumping on them." "They have too much to do already."
- Ego: "I enjoy doing it." "Only I can do the job properly." "I need to be seen to be busy."
- Competition: "I fear staff knowing as much as me."
- Urgency: "It takes time, it's quicker to do it myself."
- Anger: "I cannot trust you to get it right so I will do it myself." "You have made a mistake… I will have to do it myself."
- Lack of trust in the capacity of others: "They won't know how to do it, they don't have the right experience/knowledge/skill."

So why do you need to delegate?

Thinking about your context and workload, what would be five benefits of delegating some of your workload? Think about both long term and short term benefits:

If I delegated some of my tasks, the benefits would include:

1.

2.

3.

4.

5.

On the next two pages are short quizzes to help you identify the areas of focus. The first quiz will help you identify your attitudes toward delegation while the second looks at your readiness for delegation.

What are my underlying beliefs about delegation?

My attitudes towards delegation			
Statement	Agree	Disagree	Unsure
Helping my team learn and develop is one of my higher priorities.	☐	☐	☐
I trust my judgement that I have a sensible and intelligent team.	☐	☐	☐
I do not feel guilty about delegating tasks.	☐	☐	☐
I see delegation as an opportunity for everyone.	☐	☐	☐
I don't worry about a degree of failure. I am prepared to accept mistakes as a necessary risk when developing my team.	☐	☐	☐
I accept that a team member may be more competent at a task than myself.	☐	☐	☐
My team members will pay the same attention to detail as I would.	☐	☐	☐
I am prepared to accept responsibility in the event of any complaints.	☐	☐	☐
The benefits of delegation outweigh the fact that sometimes it will take longer for the task to be completed due to the time involved in briefing and monitoring.	☐	☐	☐
I take stock of my delegation style periodically to avoid over or under-delegating.	☐	☐	☐

Interpretation: Your attitude to delegation

Looking at the statements where you have responded that you disagree or are unsure:

- Is there a pattern you can see?
- What is the impact of these choices in the short term/long term?

Assessing my readiness

The effectiveness of any delegation is affected by the readiness of all those concerned. Read through each statement and tick the box that most closely relates to what you currently do.

Your current practice and skills			
Statement:	Almost always	Some-times	Rarely
I delegate appropriate amounts of work.	☐	☐	☐
I delegate on a regular basis, not just when I'm overloaded.	☐	☐	☐
I carefully consider the most appropriate person to delegate the task to, based on their skills, interests, workload and development.	☐	☐	☐
I tend to delegate to a variety of team members, not just the one or two people who I know will do a good job.	☐	☐	☐
I motivate by highlighting the importance of the task.	☐	☐	☐
I recognise that delegation may add to someone's workload and I help them re-prioritise.	☐	☐	☐
I ensure that people have all the necessary resources (space, time, equipment and training).	☐	☐	☐
I ensure that the amount of authority I give matches the responsibility.	☐	☐	☐
I retain an appropriate degree of involvement during delegation.	☐	☐	☐
I help team members identify and resolve their own mistakes.	☐	☐	☐
I use praise when it is merited.	☐	☐	☐
Success of team members in a delegated task is rewarded. (praise, recognition, further opportunities)	☐	☐	☐
I encourage team members to take the initiative in areas not clearly spelt out, provided they keep me fully informed.	☐	☐	☐
I provide regular feedback and support when needed.	☐	☐	☐
Interpretation: Your current practice and skills The statements to which you responded 'sometimes' or 'rarely' indicate that you have a weakness in your current practices. What are these and what may be the impact?			

Reflection

Watch this two-minute video: https://www.linkedin.com/learning/management-foundations-5/the-challenges-of-delegating-effectively?u=74831122

Have a think about the following questions, and how these might apply to what you have just watched and the quizzes you completed.

Kevin Eikenberry suggests that there are three mindsets for successful delegation: thinking of it as an investment, thinking of it in terms of the other person, and finally trusting them.

1. If you look at the two quizzes you completed, are there any areas that might concern you or act as focus areas?

2. Looking back at the two reasons you don't delegate enough and the areas identified in the quizzes, can you see any themes?

What tasks could I delegate?

Before you start looking at the tools that support effective delegation, reflect on the activities you have on your task list within the next month.

To-do list Using a scale of 1 (low) to 10 (high) rate each activity on the following factors			
Activity	Your skill	Your enjoyment	Notes

What should I **not** delegate?

There are some tasks that should never be delegated, or some situations where you shouldn't delegate:

1. Your core functions – this is often where you add the most value.
2. Where there are legal responsibilities or issues attached to the task. You cannot delegate your responsibilities as a manager under the Health and Safety Act.
3. If there are privacy issues within the task where individuals would have the expectation of confidentiality and would not expect this information to be shared.
4. If the task forms part of your management responsibilities with your team, for example, conducting performance development review meetings or recruitment.
5. If the situation means that your staff are overstretched or too busy.
6. Leadership – your team requires a personal connection and communication with you. This would include communications during times of change or crisis.
7. Providing feedback, performance management or praise.
8. If delegation only occurs when you are feeling overloaded or stretched, your staff may feel resentful and you may not have the time or energy to delegate well.

What should I delegate?

Now that you have made your list, for each task ask yourself the following questions:

1. How valuable is this activity to the organisation?
2. Imagine that an urgent matter crops up and you need to reprioritise your activities – would this activity still be included, delayed or cut?
3. Suppose you have been asked to work on an organisationally important project and you need to reassign some of your workload for the next three months – would you drop, delegate or keep this task?

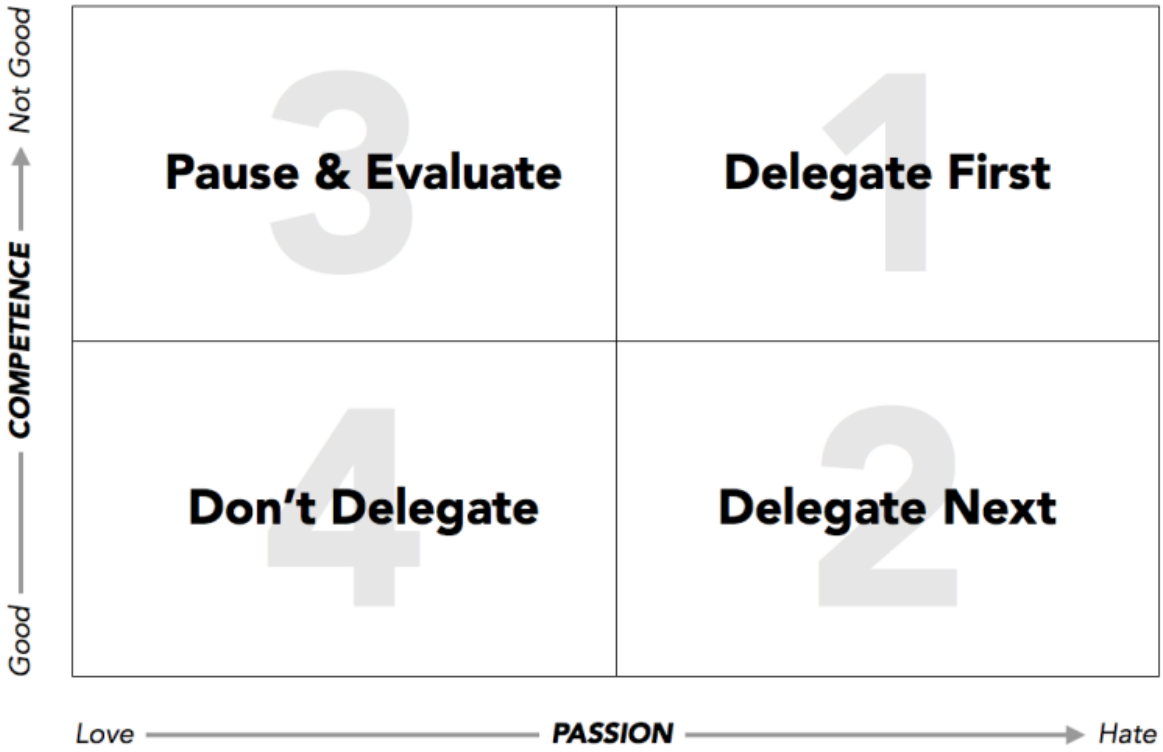
A video that demonstrates this tool can be watched at:
https://hbr.org/video/5173527560001/make-time-for-the-work-that-matters

On the following pages are some tools to support your decision making around what to delegate to others. The first two tools look at delegating to lighten your workload, while the third tool looks at delegating to develop skills and experience in your team.

Tool one: The competence/enjoyment delegation matrix

A delegation matrix is one tool used by leaders to aid in the decision as to which tasks to delegate and which to retain.

The delegation matrix is a 2×2 table measuring passion or enjoyment of a task on the x axis, and competence on the y axis.



Priority 1: Delegate first, as these are activities that you don't enjoy, nor do you have a high level of skill in. By delegating this to someone with a higher level of skill, the task will be completed to a better standard.

Priority 2: Delegate next. These activities are ones that you have a level of skill in but don't enjoy. Activities in this quadrant may drain your enthusiasm and may not play to your strengths.

Priority 3: This can be a difficult quadrant to delegate, as you enjoy these activities but you are not particularly skilled at them. The pause is to reflect on the value of gaining more competence versus delegating them to someone who holds the skills.

Priority 4: Don't delegate. These activities may be ones that you don't want to delegate as they combine skill and enthusiasm, and should add value to the organisation.

Tool two: The Six Ts

More information on this tool can be found here. The Six Ts relate to auditing your to-do list for those tasks that you don't add value to. Look at your to-do list for any of the following tasks:

1. **Tiny** ones that can seem inconsequential, but which clumped together can take up time you could spend doing higher value tasks.
2. **Tedious** tasks are ones you don't enjoy and which could be completed by anyone in the team.
3. **Time-consuming** tasks tend to involve multiple steps. This is a point where you need to ask which steps could be done by another person.
4. **Teachable** tasks are moments for upskilling others so that they have the skills to complete these.
5. **Terrible at** tasks are ones where others have a higher skill level, and if delegated the task would complete it in less time than you would and produce a higher standard of work.
6. **Time-sensitive** tasks are ones that compete with higher priority tasks but which need to be done. Could this task be done by another, leaving you the space to concentrate on your higher priority tasks?

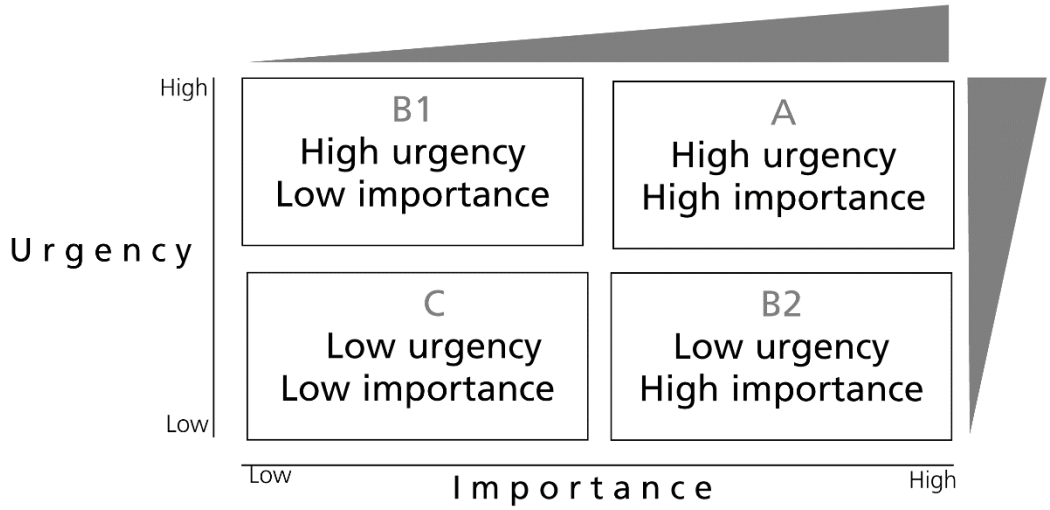
From my environment:

1. A **tiny** task is
2. A **tedious** task is
3. A **time-consuming** task is
4. A **teachable** task is
5. A task which I am **terrible at** is
6. A **time-sensitive** task might be

Tool three: Delegating for development

Delegation allows an employee to gain skills and experience and an opportunity to grow. We all have experiences where a manager delegated a task to build our experience and skills, and which built our confidence. Delegating for development aligns with a coaching approach and may take more time than delegating to an experienced staff member.

Look at your task list and place each task in the appropriate quadrant.



Simply review the tasks you have placed in each pile and see if the following approach might work for you.

Category A: High importance, high urgency – do them yourself.

Category B1: High urgency, low importance – these are tasks which could be delegated as a development opportunity. These need to be done soon, so the selection of the staff member will focus on capacity.

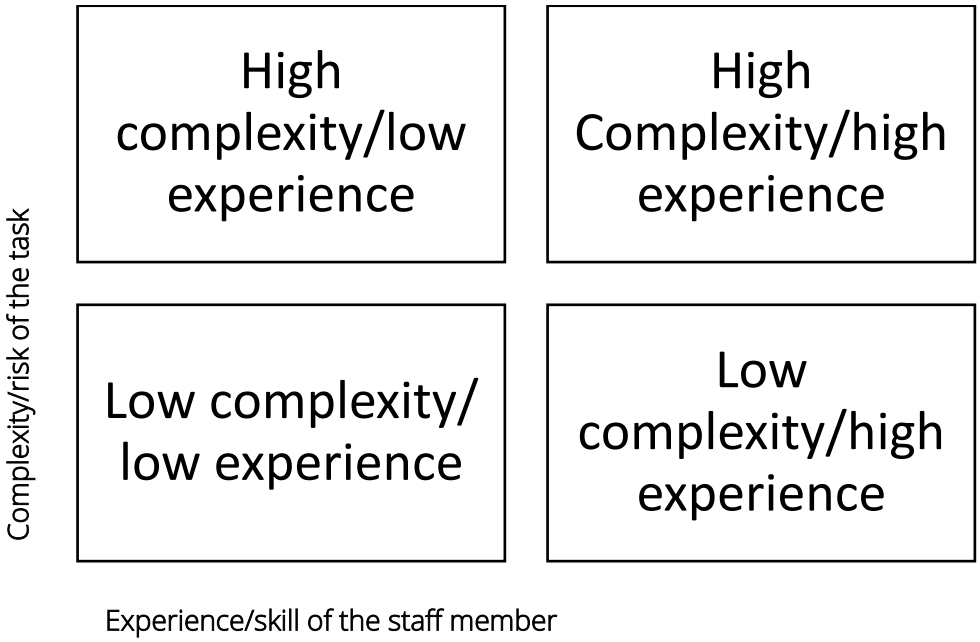
Category B2: Low urgency, high importance – consider delegating them to a reliable and experienced member of the team, and while they are of low urgency, schedule a time for completion. These are the tasks that are good for development as they have less time pressure but are important. Use the delegation of important tasks to enrich the team member's task, improve performance, and raise morale.

Category C: Low urgency, low importance – delegate and have them done sometime. Keep an eye on them.

Observe your team member's strengths and capabilities. You want to pick a task that will stretch your staff member but which will still be within their capabilities. Go through your task list and ask, "Could this task be done by someone else with a small amount of training?" When delegating for development don't concentrate on one or two people but consider each member of your team.

Delegation styles

Your delegation style or approach will depend on the level of skill and experience of your staff member and the complexity/risk of the task. This information has been adapted from the following article, where more information on the topic can be found: http://www.lmhub.com.au/coaching-brushing-up-on-the-art-of-delegation/



1. Low complexity of task delegated to a staff member with low experience: An "oversee" style is useful in this scenario, as you guide them but support them to think for themselves. There is little risk of failure with this task so it is useful for building skills.
2. Low complexity of task delegated to a staff member with high experience: This is a low-risk opportunity to delegate a task when you are confident of their skills. Take a "hands off" approach.
3. High complexity of task delegated to a staff member with low experience: Requires clear instructions covering what is to be done, how it should be done, and when it should be done by. The staff member will need regular check-ins to support the achievement of the task. This would be more of a "tell" approach.
4. High complexity of task delegated to a staff member with high experience: Requires a "consultative" delegation style, with regular updates scheduled and clear guidelines agreed about which decisions will need to be approved by you, and which they can make and report on.

Steps to successful delegation

1. Focus on the work to be delegated

Issues to consider	My notes
Identify the task. Identify the person to whom the task will be delegated to. How does this task contribute to the overall objectives? How does it relate to the delegatee's job purpose and wider personal development? Establish key goals, standards of performance and realistic time-scales. Is the delegatee confident and competent to do it? Consider what could go wrong – be realistic. Imagine your worst-case scenario. How would you react? What happens if the delegatee does not 'buy in'?	

2. Resources and support

Issues to consider	My notes
What resources will the delegatee need to do the job effectively? What will the delegatee expect from you? Time/support? Who will the delegatee be reporting to? If to more than one person, how will this be managed? How much authority will the delegatee have to make decisions? Clarify the authority limits before the job gets underway.	

3. Plan the meeting carefully

Issues to consider	My notes
Choose the place and time to delegate the task. Allow plenty of time for the discussion. • Clarify the specific task to be delegated. • Discuss the delegated task in outline, then break it into detailed parts. • Talk through each element, discussing exactly what has to be achieved. • Allow maximum personal freedom for how the task can be achieved. • Discuss resources and support. Does the delegatee need any particular equipment or training? • Explore any doubts or concerns the delegatee may have. • Jointly develop action plans. • Decide who will do what and by when. • Ownership for action must lie with them. • Agree on a brief written summary. • Ask the delegatee to summarise his or her action plan – you should not summarise it for them. It is essential that both parties have clear, specific action plans to implement agreed changes. Schedule your next meeting.	

4. Follow-up activity

Issues to consider	My notes
Follow up at checkpoints. Give positive and constructive feedback. Make yourself available. Accept risk – avoid perfectionism. Limit standards to what is acceptable and expect a learning curve.	

Overcoming objections

Play the Devil's advocate

So far the tools in this section have concentrated on the positive aspects of delegation, and have assumed that you will get a willing response from your team members when you start delegating tasks. Of course, this may not always be the case, and this tool will prepare you for some of the possible adverse reactions.

Do not be gloomy about this. Simply look down the following list and consider how you might respond should any of these eventualities arise. If, having listened to the individual, you genuinely believe this is not after all the right time to delegate to him or her, pass them by for the moment.

1. Skill

- Problem: The individual cannot do the task because he or she does not have the required skills.
- Solution: Offer training or some other skill development.

2. Confidence

- Problem: The individual has a confidence crisis and does not believe that he or she can do the task.
- Solution: Discover how the lack of confidence has arisen and see what can be done to improve things.

3. Will

- Problem: The individual does not see why he or she should do it.
- Solution: Discuss the wider situation and show how the task aids his or her future development and/or career opportunities.

4. Workload

- Problem: The individual feels he or she already has too much work to take on another task.
- Solution: Help the person prioritise his or her current workload and see how the delegated task could be fitted in.

5. Motivation

- Problem: The individual feels that *you* should do the task – that it is part of your job.
- Solution: Agree that although you are accountable for the task being done, you are also responsible for having it done in the most cost-effective way.

6. "Why don't you give it to…?"

- Problem: The individual asks why you are not giving the task to another team member.
- Solution: Avoid becoming involved in the merits of delegating to someone else. Instead, reiterate the reasons why you want him or her to take it on.

7. "No extra pay? No extra effort!"

- Problem: The individual baulks at the idea of taking on new or extra tasks without any extra money being involved.
- Solution: Stress the 'development' value to the individual of the new tasks – that he or she will develop new skills, new confidence, or enhance his or her reputation.

Handling objections

How do you manage the conversation if you encounter an objection? You can take the ACHE out of the objection by using this approach:

- A – Acknowledge the objection: Do not ignore it and carry on as though the other person has not voiced a problem.
- C – Clarify what the objection really is: Do not assume you know. The delegatee's perspective is different from yours. What you see as a problem may not be a problem to him or her.
- H – Handle appropriately with one of the solutions outlined above: Deal with the objection honestly and objectively. Avoid being defensive and seek to understand the other person's point of view.
- E – Expand the discussion: Once the objection is passed, expand the discussion into the wider area.

Nailing jellies to the wall!

Sometimes you may encounter someone who seems to have a never-ending series of objections. As soon as you deal with one issue, he or she comes up with another, and so on. If you encounter this, try this approach: As soon as you sense there is more than one objection, say to the other person, "I can see there are several issues on your mind. Can we take a few moments to list all your issues or concerns?"

- Take a clean sheet of paper and record their issues or concerns one by one and, most importantly, without discussing or challenging any of them. At this stage all you want to do is to get a full list from him or her.
- Next, go through the list clarifying what each one means – but do not try to dismiss or minimise them.
- Draw a line under the final objection and ask: 'If we can deal with all of these objections to your satisfaction, will you be able to move forward?'
- If he or she says "No", ask "Why?" Does it mean the list is still incomplete, or is there some other underlying issue affecting him or her?

- Assume the delegatee says "Yes". Now you must work through the objections one by one, dealing with the issues appropriately. You should end up with a list of objections, all of which have been crossed off.
- Finally, the delegatee should be able to say "Yes" to the proposed course of action.

Follow-up activities

The briefing is over and the individual is getting stuck into the delegated task. But you are still responsible for the final outcome of the task, just as you have a duty of care for the morale and self-esteem of the person you have delegated to. You must go on to consider the following issues.

Progress reviews

You've established a clear review process with dates and times agreed up front, so keep to them. Maintain a discreet oversight of how things are going, and only intervene if a catastrophe looms.

Make review meetings positive, honest and motivating.

Handling questions

Once the job is underway, be conscious of the questions you are being asked and the situations your advice is sought about. What do they tell you about the person's ability and confidence?

When the delegatee asks a question, insist that he or she comes up with a variety of solutions first. This helps to develop his or her self-reliance. You could suggest that he or she starts a 'Frequently Asked Questions' file on his or her computer, in which the questions asked can be listed together with the answers or solutions he or she discovers.

Completion

When the work is completed satisfactorily, be generous with rewards and praise. And do it publicly.

If it goes wrong, consider how you could have managed the process differently to have produced a more positive result. Remember: every 'mistake' is a learning opportunity, provided it is handled in the right way. The person who never made a mistake never did anything!

Involve the delegatee in identifying weaknesses in the plan or in the execution.

Praise in public – but always discuss errors or development needs in private!

Delegation within a distributed leadership model

This section has been adapted from material within the Academic Leadership Development Programme.

Distributed leadership models within the organisation can mean that work may need to be delegated or shared with colleagues or within committees. The distribution of tasks is not based on a chain of command but 'Implicit within distributed leadership is collective leadership responsibility rather than top-down authority. It is not about giving others tasks or responsibilities but recognising that leadership practice is constructed through shared action and interaction.' (Alma Harris, *Distributed Leadership Matters*)

Some questions to consider:

- What are the agreed patterns of responsibility with this group/committee?
- What roles and responsibilities have been expressed/agreed to?
- What are the group norms around task allocation?
- What are the goals to be achieved?
- How does this task connect to the goal/s of the group?
- How does this task connect to the goal/s of the individual who has the task?

The idea of social influence with rational argument, persuasion, and negotiation affects interactions between groups and individuals. Any element that strengthens the social connections may support delegation within this environment.

In a leadership role it is important to think about portfolio delegation. This is where a person/committee has delegated responsibility and authority for a portfolio (e.g. all aspects of postgraduate supervision), as compared with task delegation – where every time there is an issue about postgraduate supervision the leader is approaching a person/people to ask them to take responsibility for that task.

This is part of distributing leadership, providing opportunities for career and succession development and, above all, showing trust in other people. It is about encouraging and negotiating with other people to take on responsibilities as part of the discussion with individual staff. This type of request might be a combination of *"How can we ensure you have opportunities in the department/programme which help your career?"* and, "*I would really appreciate your help with x (e.g. chairing the committee / mentoring new staff / leading the curriculum review) in the academic unit, and this can be a great example of your service activities for promotion..."*

Other useful resource and links

This video is a useful summary: https://hbr.org/video/2700158695001/create-time-for-your-most-important-work

LinkedIn Learning has the following courses:

Delegating tasks – https://www.linkedin.com/learning/delegating-tasks/welcome?u=74831122

Managing teams – https://www.linkedin.com/learning/managing-teams-3/managing-a-team?u=74831122

Delegation collection – https://www.linkedin.com/learning/collections/enterprise/1~AAAAAAR11RI=1144035?u=74831122

Leading through relationships – https://www.linkedin.com/learning/leading-through-relationships/lead-your-way-to-greater-impact?u=74831122

Learning and Development
270 Leith Walk, Dunedin Campus
hrtraining@otago.ac.nz