A process for delegation

Before following our checklist for a delegation conversation make sure that these three conditions are in place:

1. **You can create enough time to delegate**

"It takes time to save time". To successfully delegate you will need to build in time for both instruction and correction. You will need to set time aside to collect and give all the information about the task e.g. stakeholders, available resources, required outputs. If it's a task you have habitually completed, try to view it through the lens of somebody approaching it for the first time: what do they need to know to be successful? You will also need to schedule check-in points to ensure the task or project is on course and to identify any deviations from the required outputs.

2. **You understand their level of willingness and skill**

Ideally, you will be delegating to someone who is willing, sufficiently skilled and, potentially, can see more of the detail than you. It might be that you have someone on your team who is more highly skilled than you in a particular area and so it would make more sense for them to undertake the task. But it is also likely that you need or want to build the skillset of a less experienced team member and delegating a task would help their development. To decide the best approach for supporting them, look at our video on the skill / will matrix to evaluate how to approach delegation with different team members.

3. **You are comfortable with the criticality of the task**

Is the task critical to your personal success, strategically important, sensitive or confidential? If so, it may not be appropriate to delegate the whole task although you may still be able to partially delegate to get the overall task completed.

A checklist for a delegation conversation.

Use the following steps to plan or work through your delegation conversation. This will increase your chances of setting your team member up for success rather than failure.

1. **Reasons: why this task, why them, why now?**

As Simon Sinek says in his well-known book and TED talk: 'Start with why'. This will help the person understand the importance of the task. Can you articulate why the task is directly relevant to the motivations, goals, values or aspirations of:

- Level 1: The individual themselves (what's in it for them)
- Level 2: You as group leader (what's in it for you)
- Level 3: Your research group
- Level 4: The research institute
- Level 5: The funder
- Level 6: Society, the environment, the economy? – nationally or globally?

If you can articulate the 'why' on more than one level then it will be all the more compelling.

For example, if you were delegating the supervision of undergraduate project students you might say:

- Level one: "you can develop supervision skills for your CV"
- Level two: "you would be freeing up my time to work on a grant proposal that we're writing together"
- Level three: "we want to involve more projects students working with us as it's a great way of recruiting new PhD students"

2. Results – delegate the result, not the process

Describe what the resulting product or output will look like. Explain how you will measure success or describe any minimum standards. Show exemplars of good practice.

3. Resources – what do they need to be successful?

Ask them what they feel they need to do a good job. Skills? Knowledge? Access to resources, facilities, or people? Once you have heard their perspective, share your own ideas.

4. Deadlines – clear and accountable

When is the final deadline? Are there contingencies in place? What would be the impact of any slippage in the timeline? Are there any intermediate milestones?

5. Feedback

Seek feedback on their understanding of the task. Perhaps they can recap what they have understood of the scope of the work and how it will be done. Ask them what their plan of action will be.

6. Controls – establish some risk management

Agree whether and when there will be any checkpoints. Do you need a risk management plan? When will you check in on them and what is the process if they make a mistake?

7. Support

Identify others who may be able to help you to monitor or supervise the individual. Be clear about the support you can offer: When can or can't they check in with you? Is there anything they need you to do to help them? What can't you help with?