

LeadersServe: The DELEGATE Tool

The DELEGATE Tool

The following outline will guide you through the process of delegation. Each of the 8 steps below will help ensure that you are doing all you can to successfully delegate a task to someone else in your organization. Learn the process and then implement it in your organization with the DELEGATE tool.

D – Define the outcome (What result is needed? What does success look like?)

Ensure that the person understands what results are expected with this task or responsibility. What are the measurements of success?

E – Explain the why (Why were you chosen? Why does this matter to the organization, customer, or mission?)

Explain to the person why you chose them for this task. What capacities have you seen in their life and work? What strengths do they bring that cause you to believe they will succeed in the new responsibility? How does this task align with their strengths and passion? It is a powerful statement of affirmation for any person to hear from their manager/supervisor/boss reasons why they were chosen for a task.

Then explain why the work matters. How does it contribute to the success of the organization? How will delegation allow you to focus on areas of your own strength or give more time to things that only you can do? In what way does it serve the customer and advance the organization's mission?

L – Locate resources (What information, tools, relationships, or budget are needed?)

What tools and resources will be needed for the person to succeed in this task/role? Ensure that everything needed for success has been identified and made available to the person assuming the role. If your organization has Standard Operating Procedures (SOP's) for the task you are assigning, ensure that these are available to the person and understood by them.

E – Equip (What training, examples, or coaching are required?)

What training will be needed for the person to succeed in this role? This might include formal training, informal mentoring or coaching by someone with experience in the role. If it is a skill the person already has, less time will be needed for this step. If the task is new to the person, plan for a time of training. Model the task or assignment, allow the person to do it while you watch and ensure that quality standards are met.

G – Grant authority (What level of authority is granted in this delegation?)

This is a critical element of effective delegation. Both you and the person receiving the assignment need to understand what authority you are granting to that person.

The four levels below clarify the amount of authority and ownership you are delegating for a specific task.



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Levels of Authority

1. **Follow instructions.** Complete the task as instructed and report back with results.
2. **Recommend improvements.** Complete the task and recommend improvements.
3. **Exercise your judgment.** Complete the task using your own judgement and report the outcome afterward.
4. **Take full ownership.** Take full responsibility for the work and its results, providing periodic updates.

The level of authority you grant should match the leadership capacity of the person receiving the assignment. This level must be clear from the beginning to you and the person you are asking to do the task. As people demonstrate faithfulness and competence, intentionally increase their level of authority to help them grow as leaders.

A – Accountability (How will progress be tracked?)

Clarify what the markers of progress will be. This might be numerical markers or less tangible markers like team dynamics, client satisfaction levels, etc.

T – Timeline (When will work begin? What milestones exist?)

What will be the starting date for this assignment? Will the task be fully transferred at this date, or will there be a gradual implementation of different elements of the new task? When and how will others be informed of the new assignment?

E – Evaluate (When will we meet to evaluate?)

Before delegating the task, ensure that you establish the timeline for evaluation. The timeline will depend on the task assigned, the leadership level of the person taking the role and your own confidence in their success. As you begin it is better to meet more often than to wish you had scheduled a meeting sooner! As the delegation continues, you may decrease the frequency of the meeting and increase the level of authority as the person develops their own capacity.

When you meet with the person allow them to give their perspective on what went well and what needs more attention. Add your own affirmation and observations. If there are areas where expectations are not being met, establish clear benchmarks for ongoing evaluation and if needed schedule another evaluation meeting sooner than the routine.



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This is the framework to DELEGATE effectively. Now, it's time to implement it!

Choose a task that you, or someone on your team, is currently doing that could or should be done by someone else.

List below at least three tasks that you could or should delegate:

- 1.
- 2.
- 3.

Which of the three would be the most quickly impactful if delegated?

To whom should this be delegated? (Look for persons aligned with your culture and who excel in current responsibilities.)

Now, you're ready to complete the DELEGATE tool on the next page. (You may want to make a clean copy of the DELEGATE Tool so that you can use it more than once.)

Write the name of the person and the task you chose above on the DELEGATE tool and then work through each section and put notes of how you will answer the questions. Refer to the content above as helpful.

After you have completed the tool....

Implement

Meet with the person above, discuss the plan you developed for delegation and then initiate the process.

Reflect

After your first evaluation meeting, reflect on what you learned about the DELEGATE process and what you observed happening in the person to whom you delegated responsibility.

Are there any changes you need to make in the process in the future?

What is the next task you should delegate, to whom and when?



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DELEGATE Tool			
Person:			Task:
	Action	Key Questions	Delegation Plan
D	Define the outcome	What result is needed? What does success look like?	
E	Explain the why	Why were you chosen? Why does this matter to the organization, customer, or mission?	
L	Locate resources	What information, tools, relationships, or budget are needed?	
E	Equip	What training, examples, or coaching are required?	
G	Grant authority	What level of authority is granted in this delegation? (Review levels above)	
A	Accountability	How will progress be tracked?	
T	Timeline	When will work begin? What milestones exist?	
E	Evaluate	When will we meet to evaluate? What did we learn and what needs adjustment?	

