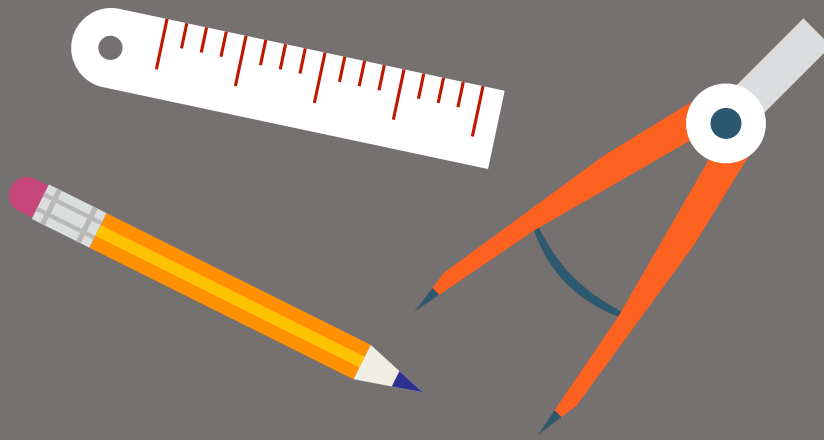


Project Delegation Worksheet

To Keep Delegated
Projects On Track



PRACTICAL TOOLS

Step-By-Step Delegation Project Worksheet



To help managers and delegates stay on track for delegated responsibilities or projects, here is a worksheet template any manager can use to monitor how the delegation is progressing.

A filled-out example of this worksheet is also included the after worksheet template.

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Step-By-Step Delegation Project Worksheet



Project:	
Recurring or one-time:	
Delegated to:	
Start date:	End date:
Date(s) detailed training took place:	
Manuals/procedures handed to delegate?	Yes <input type="checkbox"/> No <input type="checkbox"/>
Did delegate enthusiastically accept new responsibility?	Yes <input type="checkbox"/> No <input type="checkbox"/>
Did delegate indicate he or she understood what needed to be done?	Yes <input type="checkbox"/> No <input type="checkbox"/>
Was delegate introduced to new people he or she will have to work with? Yes <input type="checkbox"/> No <input type="checkbox"/>	Who?
Was deadline set? Yes <input type="checkbox"/> No <input type="checkbox"/>	Did delegate accept deadline as reasonable? Yes <input type="checkbox"/> No <input type="checkbox"/>
Any limits on authority explained?	
What interim reports are required?	
Initial feedback given?	
Was delegate given opportunity to do work his or her own way without micromanagement? Yes <input type="checkbox"/> No <input type="checkbox"/>	
Was thorough review done at end of first month? Yes <input type="checkbox"/> No <input type="checkbox"/>	
Did employee get specific feedback on how he or she did? Yes <input type="checkbox"/> No <input type="checkbox"/>	
Was employee given specific suggestions on how to do better next time?	
What other task(s) can this employee perform in future?	
Based on this experience, what other tasks/projects could be delegated successfully?	
Was delegate given opportunity to comment on what the numbers in the report mean?	

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Step-By-Step Delegation Project Worksheet



Project: <i>Prepare monthly quality defects report</i>	
Recurring or one-time: <i>Recurring</i>	
Delegated to: <i>Joe Jones</i>	
Start date: <i>March 1 (date delegate started)</i>	End date: <i>March 31 (date first report is due)</i>
Date(s) detailed training took place: <i>Feb. 27-28</i>	
Manuals/procedures handed to delegate?	Yes <input checked="" type="checkbox"/> No <input type="checkbox"/>
Did delegate enthusiastically accept new responsibility?	Yes <input checked="" type="checkbox"/> No <input type="checkbox"/>
Did delegate indicate he or she understood what needed to be done?	Yes <input checked="" type="checkbox"/> No <input type="checkbox"/>
Was delegate introduced to new people he or she will have to work with? Yes <input checked="" type="checkbox"/> No <input type="checkbox"/>	Who? <i>Delegate introduced to Production Manager as new person responsible for gathering defect reports; other crew members told to cooperate with Jones.</i>
Was deadline set? <i>March 31, end of month</i> Yes <input checked="" type="checkbox"/> No <input type="checkbox"/>	Did delegate accept deadline as reasonable? Yes <input checked="" type="checkbox"/> No <input type="checkbox"/>
Any limits on authority explained? <i>Yes, delegate knows he cannot stop production line if defect noted; needs to consult Production Manager.</i>	
What interim reports are required? <i>Weekly interim reports to supervisor; daily report if spike in defects noted.</i>	
Initial feedback given? <i>Yes, on March 8, told Jones he's doing well, watch for (detail).</i>	
Was delegate given opportunity to do work his or her own way without micromanagement? Yes <input checked="" type="checkbox"/> No <input type="checkbox"/>	
Was thorough review done at end of first month? <i>Yes, on March 31</i> Yes <input checked="" type="checkbox"/> No <input type="checkbox"/>	
Did employee get specific feedback on how he or she did? <i>Told Jones he did an excellent job for a first time; obtained feedback that he liked the task</i> Yes <input checked="" type="checkbox"/> No <input type="checkbox"/>	
Was employee given specific suggestions on how to do better next time? <i>Yes, told him to watch for (detail).</i>	
What other task(s) can this employee perform in future? <i>Jones could be trained to become quality supervisor over next few months.</i>	
Based on this experience, what other tasks/projects could be delegated successfully? <i>Payroll/overtime reports still take too much time.</i>	
Was delegate given opportunity to comment on what the numbers in the report mean? <i>Yes, Jones made excellent comments in spike in quality defects on Mondays- studying solutions now.</i>	