



GETTING TO *WHY*

Delegation Planning Worksheet

Note: The numbered steps correspond to the rights in the Delegatee's Bill of Rights.

Delegatee	Delegator	Today's Date
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1A. Task	1B. Deadline
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2A. Quality and Performance Expectations/Measurements

2B. Quality and Performance Tracking System

2C. Feedback Provider(s)	2D. Feedback Date(s)
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3. Reason for Choosing Delegatee	4A. Benefits to Delegatee
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4B. Benefits to Delegator

5. Task Priority and Delegation Level

Delegatee's Tasks	Priority Rank (1 - 5)	Delegation Level (1 - 5)	6. Can This Task Be Delegated?	
1. New Task			N/A	
2. _____			Yes	No
3. _____			Yes	No
4. _____			Yes	No
5. _____			Yes	No

7. Training and Tool Plan

Training Step/Tool	Trainer	Target Date	Date Completed/ Provided
1. _____	_____	_____	_____
2. _____	_____	_____	_____
3. _____	_____	_____	_____
4. _____	_____	_____	_____
5. _____	_____	_____	_____



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The Levels of Delegation

1. Don't do anything until I tell you.
2. Check with me before you do it. Report back right after you do it.
3. Check with me before you do it. Report back routinely (daily, weekly, monthly).
4. Do it. Report back right after you do it.
5. Do it. Report back routinely (daily, weekly, monthly).

The Delegatee's Bill of Rights

For every task delegated, a delegatee has the right to know and provide his or her opinion on the following:

1. What the task and deadline are.
2. What level of task quality and performance is expected, how quality and performance will be measured and tracked, and how and when feedback will be provided.
3. Why the task is being delegated to him or her and not someone else.
4. What the benefits of delegation are for both the delegator and the delegatee.
5. How the task ranks in priority compared to other tasks for which the delegatee is responsible.
6. Whether one or more of the delegatee's current tasks can be delegated to others so that the delegatee can focus on the new task.
7. Who is going to train or coach the delegatee and what are the steps of that training. What are the tools needed (computer, production equipment, or anything needed to perform the task), and who will provide the training on them.

Delegator _____ **Delegatee** _____

Date _____ **Date** _____