
DELEGATING

VITAL LEADERSHIP

Promoting & Sustaining
Healthy Organizations



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INTRODUCTION

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I Have a Lot To Do!



Communicate



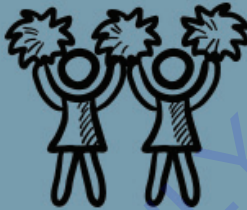
Console



Coordinate



Educate



Motivate



Fix Things



Report



Remember



Equip



Energize



Manage Others



KEY CONCEPTS

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You Do What?! The Delegating Template

Complete this template to prepare for delegating tasks and responsibilities at work.

Also, when instructed to do so, assign a level of delegation, from 1-5.

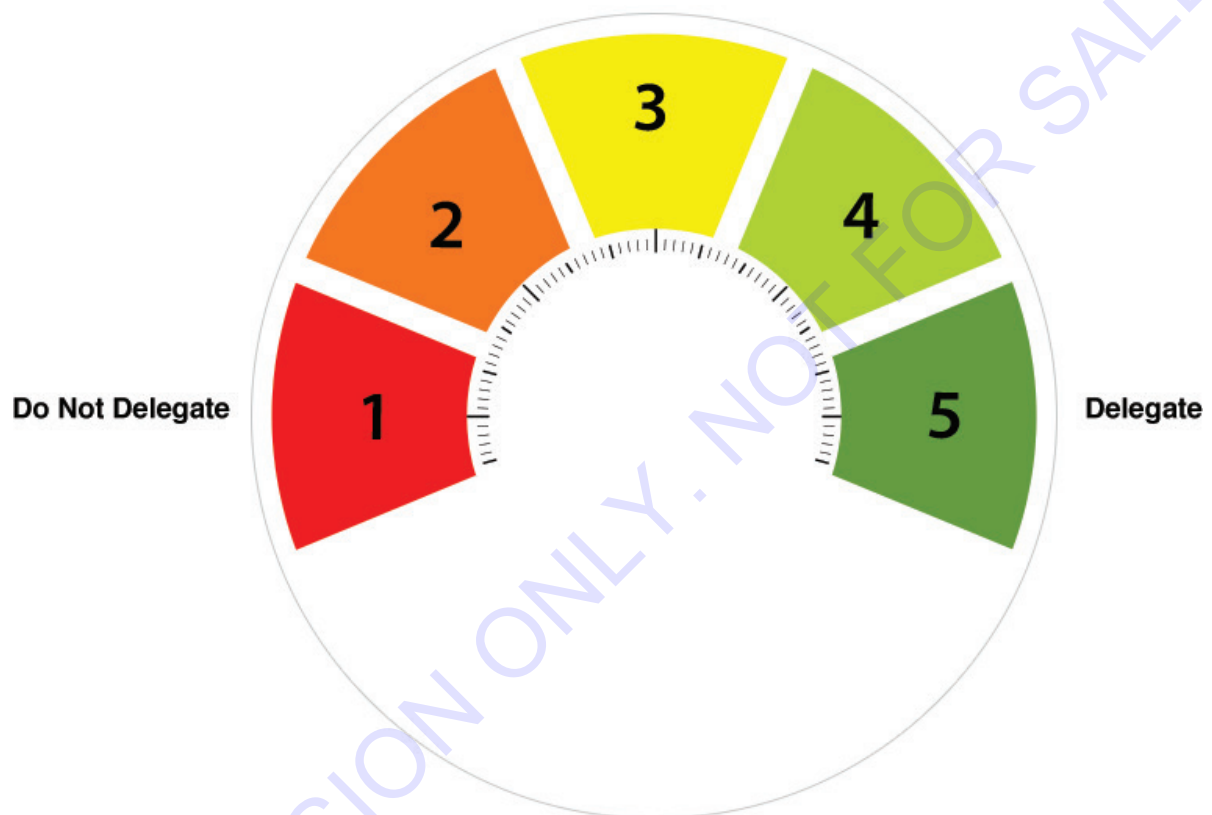
My responsibilities as a leader...

Level

1	_____	()
2	_____	()
3	_____	()
4	_____	()
5	_____	()
6	_____	()
7	_____	()
8	_____	()
9	_____	()
10	_____	()

Levels of Authority for Delegation

All team leader tasks and responsibilities fall along a scale of “1” to “5” (representing the ability for that task to be delegated). The levels of authority for delegation are as follows:



1. Tasks that team leaders must do.
2. Tasks that team leaders should do but that team members could assist them in doing.
3. Tasks that team leaders could do but that team members could also do if given the opportunity.
4. Tasks that team members should do but that team leaders could help them do in an emergency.
5. Tasks that team members must do.



SKILL POINTS

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The *Delegating Achievement Path*

This path represents the skills you will learn and use to delegate tasks and responsibilities to team members.

Leadership:

- Maintain or Enhance Team Member Self-Esteem
- Focus on Behavior
- Encourage Team Member Participation
- Lead Effective Meetings

Communication:

- Craft Clear and Concise Messages
- Deliver Messages Designed for the Team Member
- Manage Nonverbal Behaviors
- Listen to Communicate



What Would You Say?

For each situation below, review the background information and quote from your team member. What *Delegating Skill Point* would you use to handle this situation?

Scenario #1:

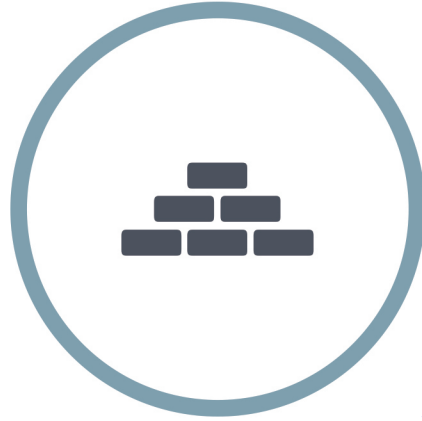
A competent team member is reluctant to start a new assignment.



“I’ve never done this by myself before. What if I mess up when you’re gone?”

Which Skill Point would you use for this situation?

How would you say this Skill Point?



FOUNDATIONAL SKILLS

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Obstacles on the Achievement Path

Use the Foundational Skills to remove team member obstacles on the path to a successful meeting.



Common Obstacles:

The team member doesn't believe he/she is capable of handling the task.

The team member thinks the delegation is punishment.

The team member resents taking orders from someone who he/she believes is less qualified.

The team member passed the task on to another team member; he/she doesn't understand the limits of his/her authority.

The team member needs more direction.

The team member is confused by the number of steps or the details of the task.

Obstacle:

Solution:

Obstacle:

Solution:

Obstacle:

Solution:



POSITIVE MODEL

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Positive Model Background Information – Office Model

The team's major corporation has recently merged with Capital Manufacturing. Nancy, the team leader in charge of remodeling the office, is busy coordinating merger activities. Nancy would like to delegate this task to Angela, a hard-working, dedicated team member. The remodeling must be completed as soon as possible because extra space is needed for Capital employees moving into the office.



Action Plan Worksheet – Office Model

Essential Skills of Communicating

- Craft Clear and Concise Messages
- Deliver Messages Designed for the Team Member
- Manage Nonverbal Behaviors
- Listen to Communicate

Essential Skills of Leadership

- Maintain or Enhance Team Member Self-Esteem
- Focus on Behavior
- Encourage Team Member Participation
- Lead Effective Meeting

1. Open: Explain what you would like the team member to do and why.

OK to remodel office but must be done in eight weeks because of merger and don't have time.

2. Clarify: Detail the responsibility and the specific tasks required.

*Angela is in charge once we approve plan. Talk to anyone needed for advice or suggestions.
Coordinate and select furnishings, order furnishings, follow up on delivery, and supervise installation.*

3. Seek/Share: Discuss the team member's thoughts about the task and identify potential barriers or issues.

Based on budget and two month deadline, is it doable? Who handles her other tasks? When can I get some initial recommendations?

4. Agree: Establish a plan for the team member to assume responsibility for the task.

Get input from others in office, including floor plan. Choose from the website based on list and budget. Seek advice when needed. Hit two month deadline.

5. Close: Express your confidence in the team member's ability to succeed with their new responsibility.

Thank Angela for her help. Show appreciation.



SKILL PRACTICE # 1

OFFICE

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Skill Practice Instructions

This Skill Practice exercise is designed to give you practice in carrying out the Skill Points you have learned in this course.

Team Leader:

- **Your objective:** Consciously practice the Skill Points.
- **Background Information:** Details for your role in this Skill Practice situation are found in your workbook.
- **Coaching:** Fill out the Action Plan Worksheet during the coaching session by writing down the phrases you want to use for each Skill Point.
- **Skill Practice:** Use the words you wrote down to complete all five steps for a successful change meeting.
- **Debrief:** Moving through each Skill Point one at a time, ask your group how successful you were in completing that step. Request feedback on use of the Foundational Skills as well.

Team Member:

- **Your objective:** Provide the team leader an opportunity to practice the Skill Points.
- **Background Information:** Details for your role in this Skill Practice situation are found in your workbook.
- **Skill Practice:** Try to use the statements provided to you in the Background Information.
- **Skill Practice:** Don't add new elements to the situation, which may make it more difficult for the team leader.
- **Skill Practice:** Details of the situation can be found in your workbook.
- **Debrief:** Add your thoughts to how well the team leader used the Skill Points and the Foundational Skills.

Coach:

- **Coaching:** Ask questions to help the team leader determine what he/she will say to use all of the Skill Points, including the Foundational Skills.
- **Skill Practice:** Take notes on the Coaching/Feedback Form during the Skill Practice. This will help you provide targeted, specific feedback to the team leader using the “Coaching/Feedback Form” in your participant workbook.
- **Debrief:** Use your notes to lead the debriefing session by providing feedback on all of the Skill Points and Foundational Skills as noted on your “Coaching/Feedback Form”.
- **Self-Assessment:** Ensure the team leader shares their answers on the “Self-Assessment” with the group.



SKILL PRACTICE #2

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Skill Practice #2 – Prepared or Do Your Own

Choose either a prepared situation below or create your own situation, using the form on page 67. Then complete the Action Plan Worksheet on the following page. A supplementary set of Skill Practice worksheets is included for the option to complete both the Prepared and the Do Your Own practices.

Prepared Skill Practice

Office Scenario:

You are the team leader for a medium-sized organization. Your organization is launching a new product in two weeks and your manager has asked you to check the accuracy of the marketing materials created for the launch. You spend about one hour per day reviewing the materials.

Soon after you start your review, a new project begins that requires you to attend meetings several times each day, and you will not be able to handle all of your current responsibilities. The marketing materials review is an important task that needs to be completed in two weeks, but you don't have time to do it.

You decide to delegate the materials review task to your team member. Your team member has been with the organization for two years and wants to advance within the organization. Your team member is smart and a quick learner, but has little experience in checking marketing materials for accuracy.

Healthcare Scenario:

You are the team leader for a medium-sized healthcare organization. Your organization is changing names and rebranding in two weeks and your manager has asked you to check the accuracy of the marketing materials created for the rebranding. You spend about one hour per day reviewing the materials.

Soon after you start your review, a new project begins that requires you to attend meetings several times each day, and you will not be able to handle all of your current responsibilities. The marketing materials review is an important task that needs to be completed in two weeks, but you don't have time to do it.

You decide to delegate the materials review task to your team member. Your team member has been with the organization for two years and wants to advance within the organization. Your team member is smart and a quick learner, but has little experience in checking marketing materials for accuracy.

Industrial Scenario:

You are the new team leader of 20 drill press operators, none of whom you've worked with before. The organization sponsors outings for departments your size. The next outing is coming up in two months, and you want it to be a success. You don't have the time to go around and find out what preferences your people have, what their favorite activities are, what's been done in the past, etc.

You decide to delegate this project to one of your younger team members, with the least seniority in the department. This way, you get your information, and your team member gets to know the other workers better. Your team member, however, is not too excited. He is intimidated by some of the older workers and is afraid he'll be seen as conceited or self-important.

Do Your Own Skill Practice

- What is the work environment?** (Office, assembly line, etc.)

- Team Leader Role:** Who is the team leader? What is important to know about the team leader's role in the situation? What does he/she hope to accomplish?

- Team Member Role:** What is the team member's job? What is important background information about the team member and his/her role in the organization? How does the team member behave generally?

- Describe the Situation:** (Keep it simple.) What task is the team leader delegating to the team member? Why is the delegation occurring? What does the task involve?

- Team Member Response:** What might be the team member's reaction? What issues or questions might the team member have?



REINFORCEMENT

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48 Hour Reinforcement

Complete these sample scenarios within 48 hours of course completion to practice Skill Points and reinforce the concepts.

1. After being given assignments on the operation of a new machine, a team member becomes confused and makes errors.

Open: _____

Clarify: _____

Seek/Share: _____

Agree: _____

Close: _____

2. A team member asks to be relieved of the responsibility for a project.

Open: _____

Clarify: _____

Seek/Share: _____

Agree: _____

Close: _____



SUMMARY

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The *Delegating Achievement Path*

This path represents the skills you will learn and use to delegate tasks and responsibilities to team members.

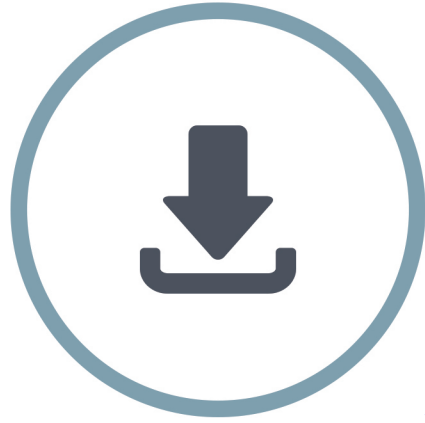
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ADDITIONAL RESOURCES

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Delegating Action Plan Worksheet

Essential Skills of Communicating

- Craft Clear and Concise Messages
- Deliver Messages Designed for the Team Member
- Manage Nonverbal Behaviors
- Listen to Communicate

Essential Skills of Leadership

- Maintain or Enhance Team Member Self-Esteem
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1. Open: Explain what you would like the team member to do and why.

2. Clarify: Detail the responsibility and the specific tasks required.

3. Seek/Share: Discuss the team member's thoughts about the task and identify potential barriers or issues.

4. Agree: Establish a plan for the team member to assume responsibility for the task.

5. Close: Express your confidence in the team member's ability to succeed with their new responsibility.
