

Effective Delegation in Three Simple Steps

Delegation isn't a do-it and forget-it action. "Very rarely can you have one conversation and hand somebody a project, and then boom, it magically appears exactly as you expected," says Jerry Hauser, CEO of [The Management Center](#), a Washington, DC-based firm that advises nonprofit leaders on how to more effectively manage their organizations. In Hauser's experience, delegation is a balance between trusting others to get the work done and taking steps to ensure that those you've delegated to have the support needed to meet expectations. He outlined a three-step process that can help nonprofit leaders ensure their goals are met while empowering their staff members to take on greater responsibilities.

Step 1: Hand over the responsibility and agree on expectations

This step is one that many leaders do intuitively, but often not as thoroughly as they should, says Hauser. In handing over responsibility for a project or task, remember the five Ws:

- **What:** Make sure that you and the person you're delegating to have an agreed upon clear picture of what success looks like. "If you only do one step, this is the most important," says Hauser.

"One manager we worked with," explains Hauser, "had delegated the work of redesigning the organization's website so it would have a more modern look and feel. But, she and her staff member hadn't talked through what that meant. A lot of work went into the project before they realized that they both had different ideas about the final outcome. It would have gone much differently if they been aligned from the start—being explicit about what 'modern' meant and what would impress their audience, looking at other websites that met the criteria and talking about why, and so forth."

- **Why:** Articulate why the project is important and, when appropriate, why you've asked a particular person to do it. "Leaders tend to forget this step, but it can be powerful in delegating work," says Hauser. For example, let's say you've asked a staff member to arrange a panel at an upcoming event; explain why having a really great panel matters. "We're trying to get our constituents excited about this issue. We want them to sign up to take all these actions afterward. This panel is the first step in that so it needs to be a huge success." Then explain why you've asked that particular person to do it. "I've asked you to do it because I've been wanting to engage you more in thinking about the policy implications of our work. Thinking about who the good panelists would be is one step in that direction."
- **Who:** "One of the strengths of nonprofits is that we're good at being inclusive and involving lots of people in our processes and in our different pieces of work," Hauser says. "I truly believe this leads to better outcomes—when done right. When not done right, it can be chaos and nobody's clear on what his or her role is in a particular project or process," he warns. So be clear about the roles of everyone involved in a project,

Boston

535 Boylston St., 10th Floor
Boston, MA 02116
T. 617.572.2833
F. 617.572.2834

New York

112 West 34th St., Suite 1510
New York, NY 10120
T. 646.562.8900
F. 646.562.8901

San Francisco

465 California St., 11th Floor
San Francisco, CA 94104
T. 415.627.1100
F. 415.627.4575

including who the owner is (the person ultimately responsible for the project's success), and who else the owner should pull in as helpers, approvers, or people who should be consulted along the way.

- **Where:** Where can this person go for help? Is there something that was done in the past that can serve as a model for the current project? Or a budget that holds information important to the projects successful completion? Have a list of potential resources and share them when you assign the project.
- **When:** This is the deadline. You also may want to meet to review the project at interim stages, such as seeing a draft or a piece of the project. Be clear when those interim stages should happen.
- **...And a little bit of the How:** Although people often think that telling someone how to do a task crosses the line of micromanagement, if you have thoughts about how something might best be done, you should share them. "We've found over and over that staff members will practically beg to hear what's on your mind," Hauser says. If you don't tell them, there could be information helpful to getting the project completed that wasn't shared. Staff members can always be free to incorporate your advice or come up with a better approach, but if you have thoughts, don't hide them, suggests Hauser.

Assigning Responsibilities Worksheet

The MOCHA model (manager, owner, consulted, helper, approver) from The Management Center can help you articulate who should play what role throughout the course of the work you've delegated.

[Download the worksheet >>](#)

Once you've laid out the assignment, ask the person taking on the task to sum up the project if it's reasonably straightforward. If it's a bigger project, ask for a short email that summarizes the key points that you've agreed to. "Inevitably, you will realize you forgot to share something that you should have. And a week down the line, it's helpful to have something on paper that reminds you and them of the conversation so you can check back against it," Hauser adds.

Step 2: Don't delegate and disappear

"The classic mistake many nonprofit leaders make is that they set expectations and hand something off—and then they assume it's just going to happen," Hauser says. To be sure things stay on track without hovering, find a way "to get your hands dirty and see a slice of the work before it's too late," he adds. There are a number of ways you can do this depending on context. For example, one manager Hauser and his team worked with was regularly getting frustrated when her staff would give her fully-written campaign materials to sign off on that didn't align with her expectations. And her staff became frustrated too, because they'd put significant work into the materials and then would need to redo them at the last minute. "When she started asking to see outlines and talking points for key arguments, she was able to provide guidance at the right stage in the process—saving both her staff and herself from that frustration, and saving everyone time down the road," Hauser says.

"It's not that you watch over the person's shoulder the whole time on everything they do. It's like taking a slice of pie, you don't need to eat the whole pie to know how it tastes," he adds. You want to check in to be sure the person who's responsible for the project can adjust before it's too late.

Step 3: Create learning opportunities

Debrief on how the project went. Methods for doing this can vary anywhere from a brief conversation to a big-picture check-in. Consider asking: What worked? What didn't work? And what do we want to remember next time? "You might schedule a whole separate meeting to debrief and reflect on the lessons. And frankly, the hardest thing about this [for nonprofit leaders] is remembering to make sure it happens," Hauser says.

Make it easier to remember by planning for it at the beginning of the assignment. "One benefit of doing this is that you don't wait until something's gone poorly and then say, 'Oh, we need to debrief this,' which then makes the debrief feel punitive," Hauser says. "Say at the front end, 'We're going to debrief on this. If this goes great, we want to make sure we take the lessons; if it doesn't, we want to make sure we take the lessons.' The accountability part is important."

How you do all three of the steps above will be shaped by a final consideration: adapting your approach to fit the context. You might consider both the person to whom you're delegating and the nature of the task. Is the person to whom you're giving the responsibility highly skilled for this particular assignment, or is this a stretch opportunity in which more of your involvement might be needed? Is the project a one-off proposal or something that has a longer tail and bigger implications for the organization? Understanding the context in which you're delegating should act as your guide to how to best use each of the three steps.

Managing to Change the World

The Management Center's Jerry Hauser and Alison Green offer usable, step-by-step guidance and tools on how to turn missions and strategies into real-world impact in their book, *Managing to Change the World*.

[Learn more about the book >>](#)