

Delegation: Setting Your People Up for Success

September 2016 SSL Cohort Day

*Adapted from The Management Center and
Laura Clancy's Talent Intensive materials*

Aim and Agenda

Aim:

- Apply best practices for delegation to a real-world project they will delegate soon

Agenda:

5 min	Aims, Agenda, and Framing
5 min	Turn + Talk: Debrief Pre-Reading
60 min	The Six Steps of Effective Delegation --Application and partner practice throughout!
5 min	Wrap-Up and Takeaways

Assumptions about this session

- ✓ There is varied levels of experience in this room.
 - For new folks: practices to use right away
 - For more experienced folks: refresher, vocabulary to help you teach others
- ✓ Confidentiality is critical.
 - You will be applying a delegation framework to a real task and a real person. Please keep everything you hear confidential.

“Pear” Up!

Find a partner you will work with during this session.



If you are a veteran SSL, please make sure you are paired with a *new* SSL!

Turn and talk

We read the article “How Office Control Freaks can Learn to Let Go” for pre-work.

What is one mindset that you found in the article (either that *promotes* or *gets in the way of* delegation) that resonated with you, and why?



Individual contributor

When you're just doing it yourself, it's called work!



Getting promoted

- ✓ You do a good job, so you get promoted.
- ✓ Now, you are responsible for a much bigger result.



The opportunity – and the challenge

A large pyramid of stone blocks, likely the Great Pyramid of Giza, is shown under a bright blue sky with scattered white clouds. The pyramid is constructed from numerous layers of rectangular stone blocks, and its base is surrounded by a field of smaller, broken stones and debris. The overall scene is a classic representation of ancient Egyptian architecture.

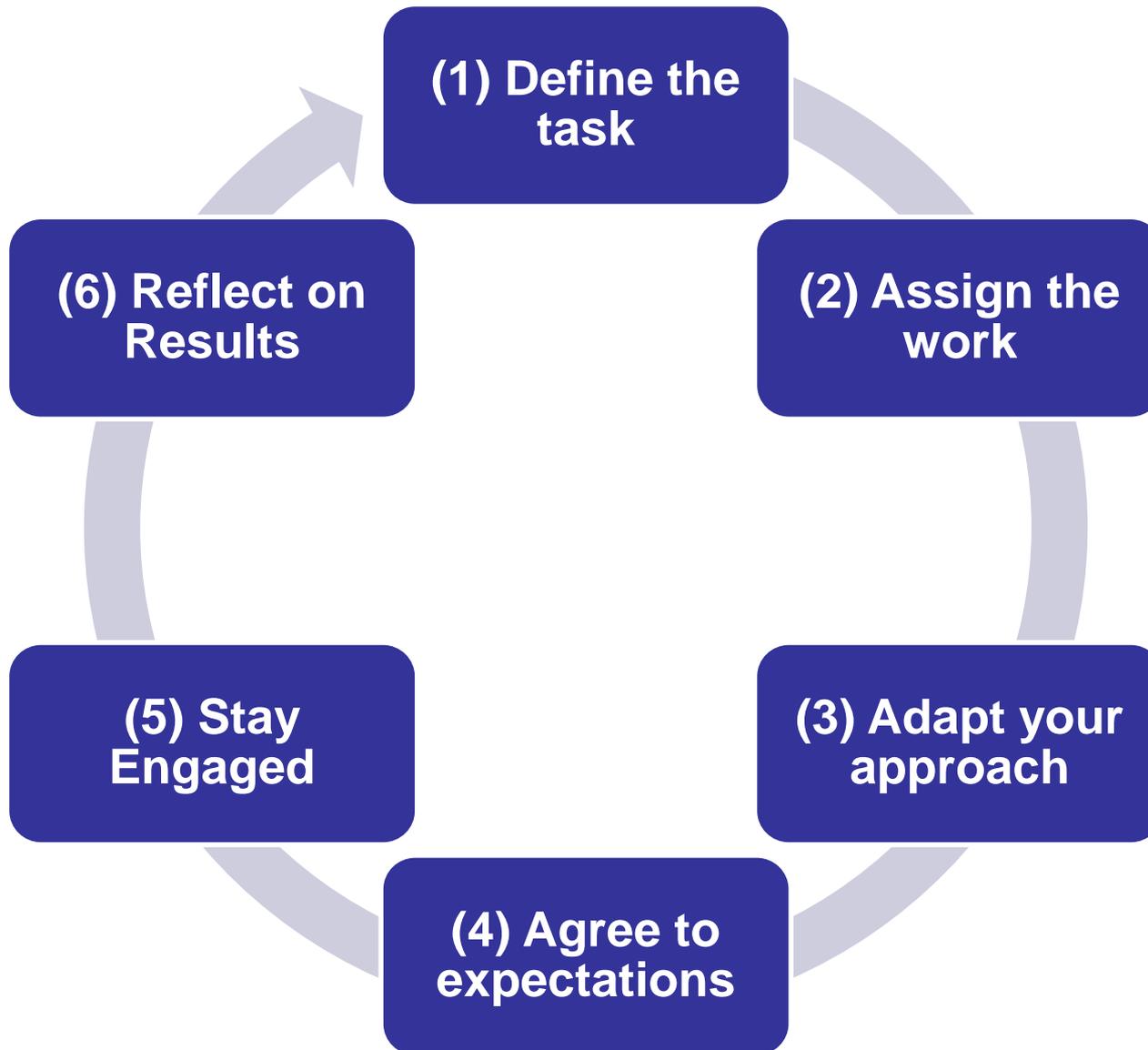
You're given a team of people to help you, and through them, you can get much more done, a lot more quickly.

IF you manage them effectively....

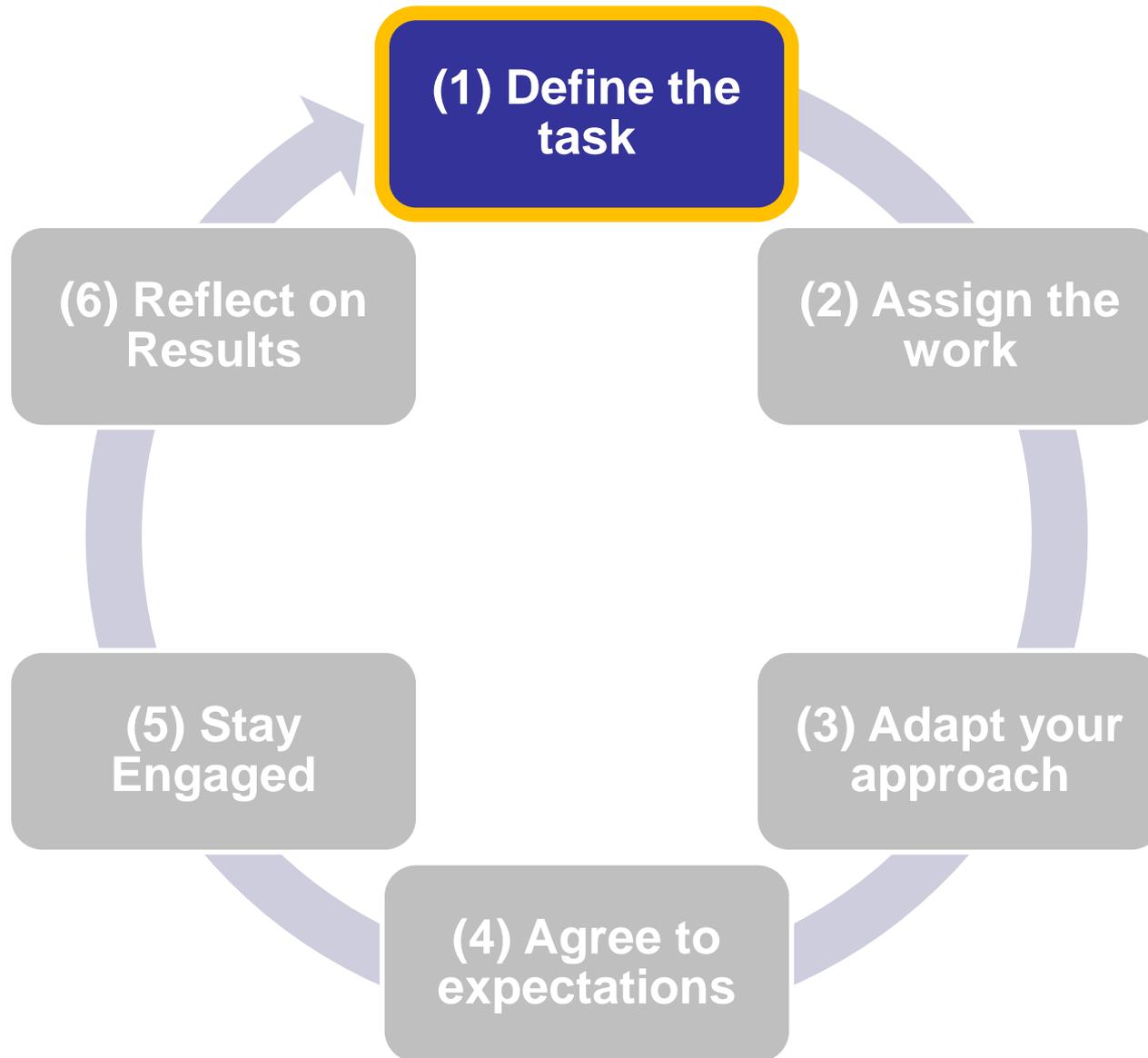
Management + Leadership...

“...requires redefining competence as ‘helping others to do great work,’ instead of ‘doing great work all by myself.’”

Six Steps for effective delegation



Six Steps for effective delegation



Step #1: Define the task

Share with your partner

1. WHAT is the upcoming project you have chosen to delegate? *It could be as small as a memo or as large as PD Day.*
2. HOW does it fit into the impact you want to have on Achievement First? (Why is it important?)
3. WHY have you chosen this project or activity to delegate?

Delegated tasks should be SMART

S

- Specific

M

- Measureable

A

- Agreed

R

- Realistic

T

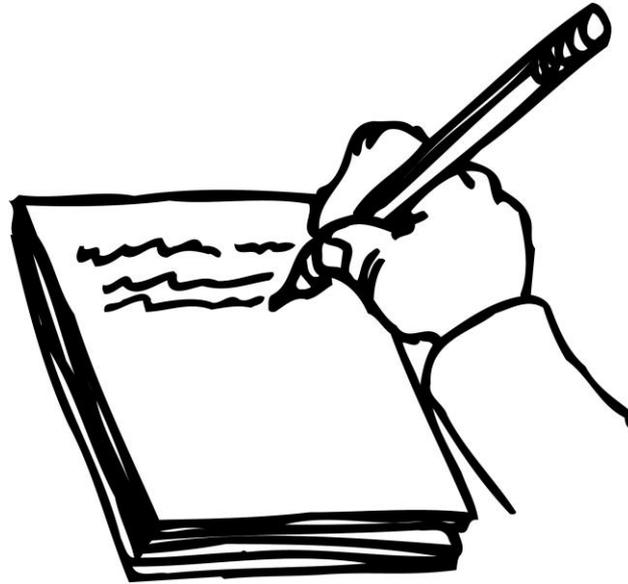
- Timebound

Questions to answer *before* delegating



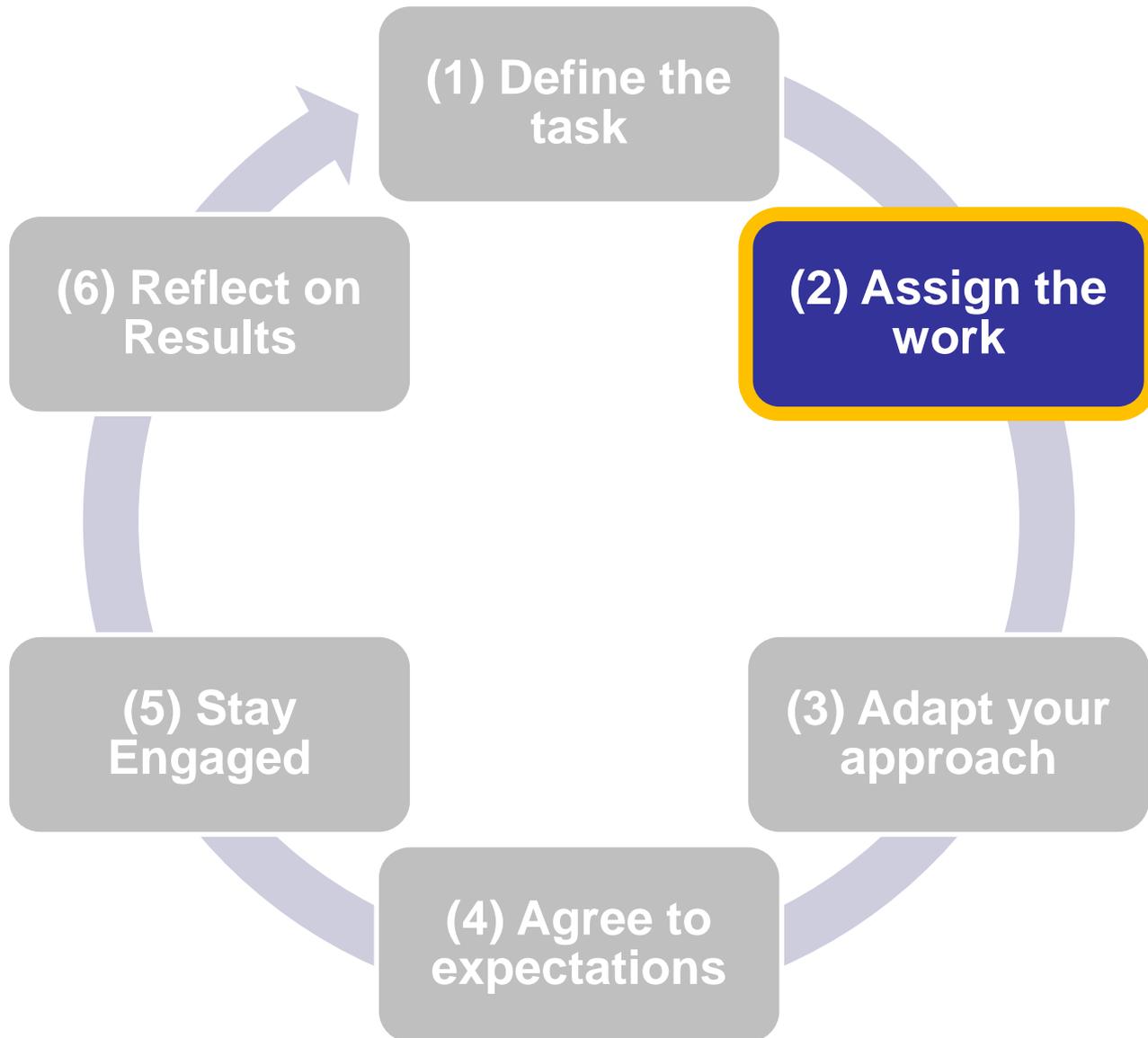
1. Is the project ready to be delegated? Is it SMART?
2. Is there someone who can do the work?
3. Do you have the TIME to delegate the job effectively, explain the outcomes, and provide ongoing support?

Your Turn: Define the Task



Write out the project/task you are delegating on your handout, ensuring it meets the SMART criteria.

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Selecting who to assign the work to

Should be able to do it

Title/position

Years of experience

VS

Will be able to do it

Time

Talent/Skills

Interest

“Why me?” “Why this?” “Why now?”

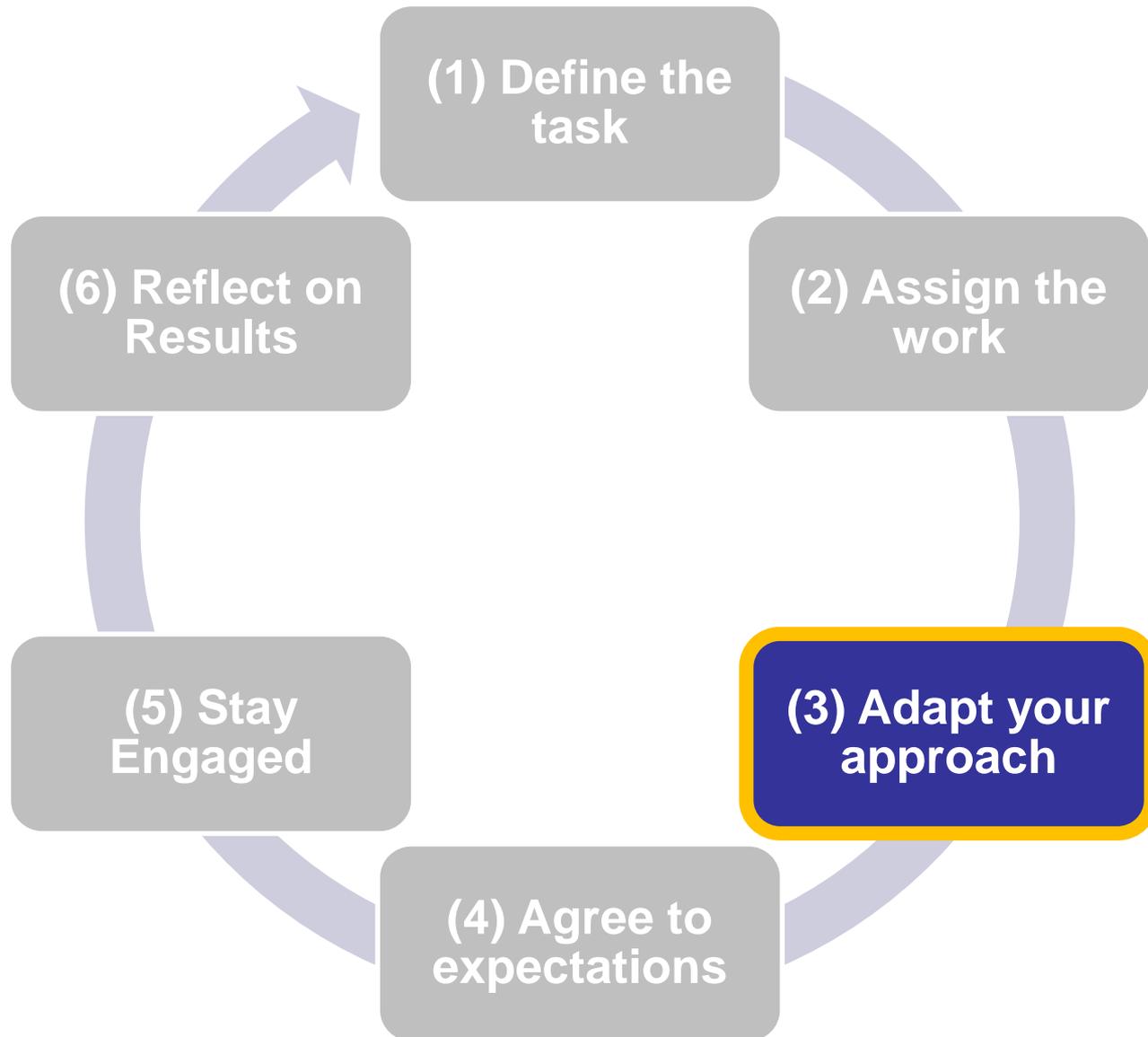
- ✓ When assigning the work, you’ll want to be really clear about being able to answer these questions.
- ✓ You’ll want to be really specific about:
 - Why this person needs to do this particular work
 - Why it’s important
 - What is the benefit to the person you are delegating this to.

Your Turn: Decide who to delegate to



Go back to your session worksheet, and take 2 minutes to answer these questions.

Six Steps for effective delegation



Step #3: Adapt Your Approach

REALISTICALLY answer the question, “How hands-on do I need to be?”

Importance & Difficulty (Task)



**Will & Skill
(Person)**

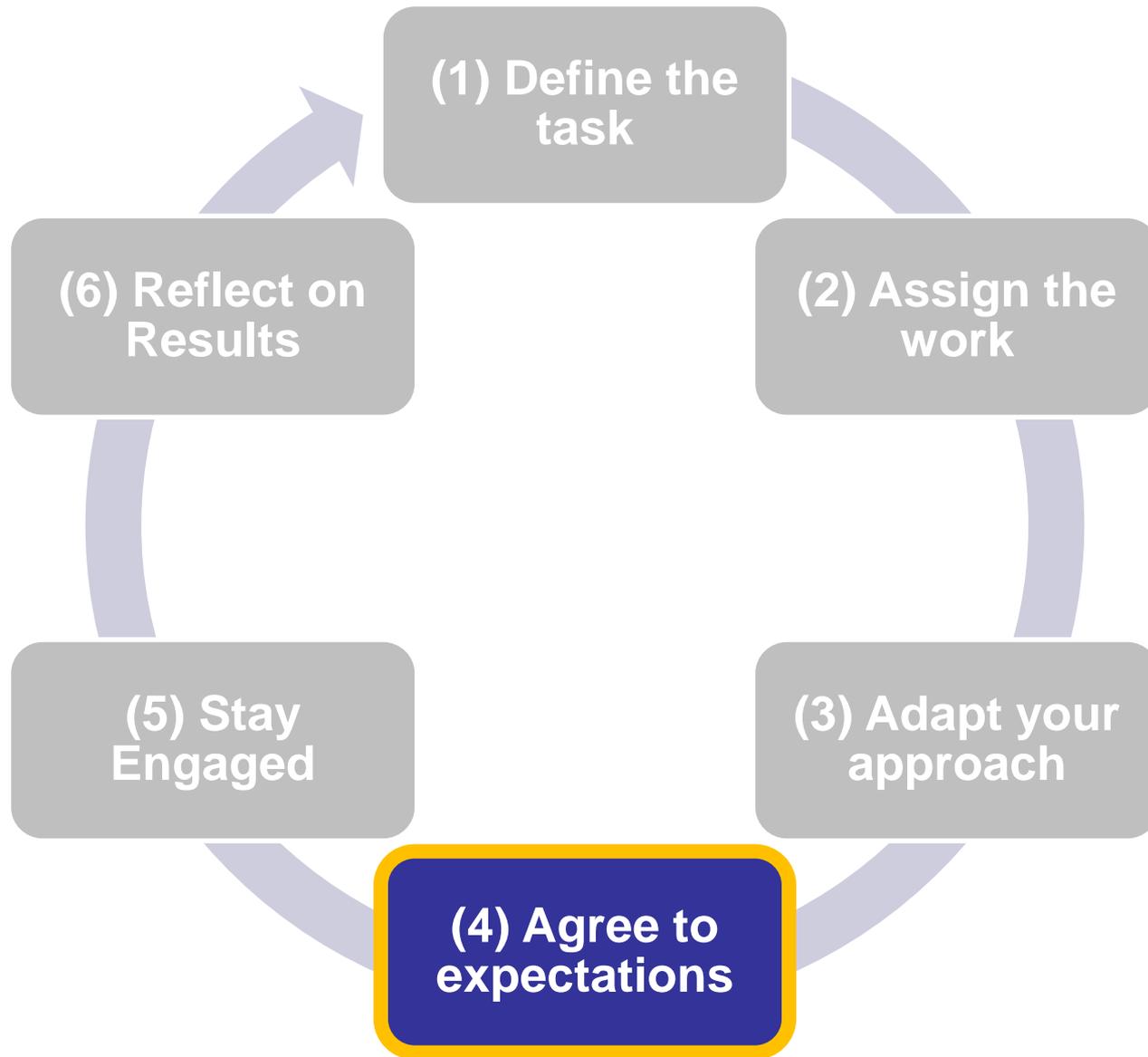
	LOW	HIGH
HIGH	RELATIVELY HANDS-OFF	HANDS-ON
LOW	MODERATELY HANDS-ON	VERY HANDS-ON

Your Turn: Adapt Your Approach



Go back to your session worksheet. About where does this task and person fall? What does that mean for how you'll need to approach the work with them?

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Setting Clear Expectations

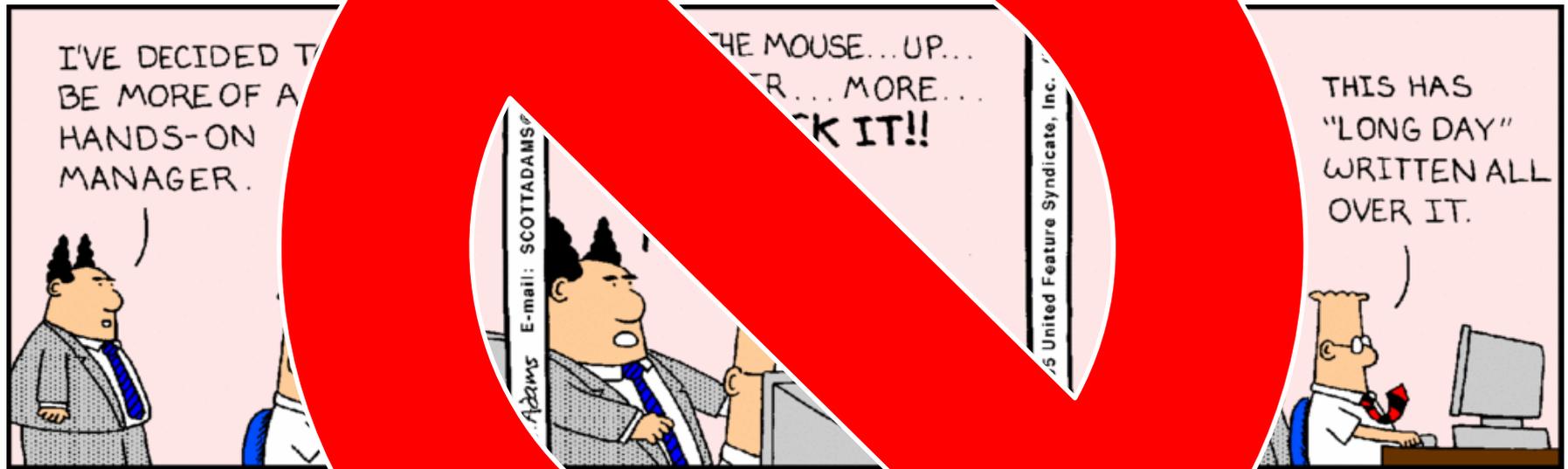
1

“I’d like you to prepare and send an email to all teachers telling them about the new homework policy. It needs to go out by the end of next week and include all relevant details of the policy.”

2

“Please create and distribute a grade level chair expectations email. Make sure you state the salary.”

“But I don’t want to micromanage...”



Why set clear expectations?

Think of a time when someone has asked you to do something, and after completing it, you discovered there was information that you needed in order to be successful?

- What was the impact on you?
- What was the impact on the work?
- Why is it actually MORE motivating to be clear on the front end?

The 6 Keys of Setting Clear Expectations

1. Specify ROLES
2. Provide appropriate BACKGROUND/CONTEXT
3. Be specific about the OUTCOMES you want
4. Make RESOURCES available
5. Be clear about CONSTRAINTS and relative PRIORITY
6. Do a REPEAT BACK

Key 1: Specify roles, with ONE “owner” (OAPIC).

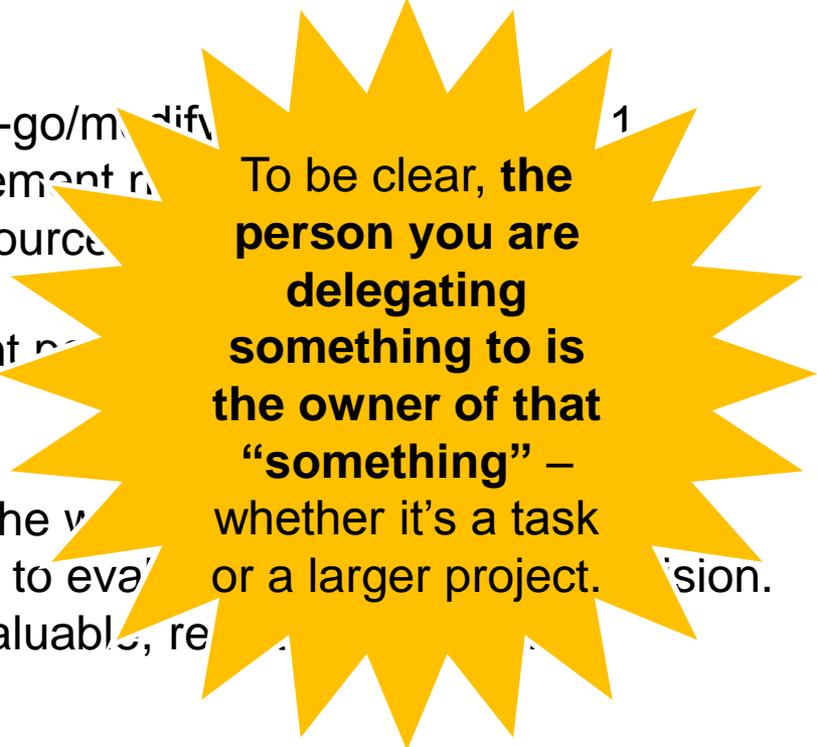
O Owner. Has overall responsibility for the success or failure of the project. Ensures that all work gets done and others are involved appropriately.

A Approver. Makes final “go/no-go/modify” decision. One person, sometimes with agreement from others. Approver should be able to allocate resources.

P Performer(s). Does significant work. Performer can also be the Owner.

I Input. Provides input to how the work is done. Provides recommendation for Approver to evaluate. Assigned only to those with valuable, relevant, and timely input.

C Communicated to. Who is communicated to, and how, after a decision is made and/or as the project is underway. By default, all Is should be communicated to.



To be clear, **the person you are delegating something to is the owner of that “something”** – whether it’s a task or a larger project.

Your Turn: Setting Clear Expectations



Go back to your session worksheet (page 2), using the prompts to write notes related to this key for setting clear expectations.

Key 2: Provide appropriate background/context



You likely know a LOT more about the task or project than this person ever could from their vantage point. This is where you **let them inside your head.**

Key 2: example

As you know, after gathering input from the LT, we decided to make our student homework policy more rigorous.

Because we don't want to be bureaucratic, we'd like to send a memo rather than the entire school manual (we'll do this at the beginning of the next school year).

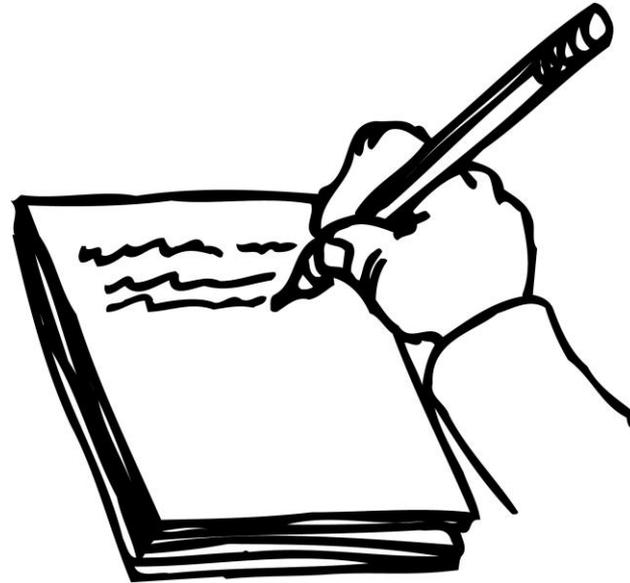
In the past, we've had some conflict with teachers pushing back on policy changes. We want to make sure teachers know that this is a trial policy, which we'll revisit at the end of the semester.

The memo will be our main vehicle for clarifying the policy – a good memo and supporting materials will lead to few questions asked and clean implementation.

What type of context was provided?

What is the impact of sharing this kind of context?

Your Turn: Setting Clear Expectations



Go back to your session worksheet (page 2), using the prompts to write notes related to this key for setting clear expectations.

Key 3: Be specific about the OUTCOMES

*“The memo should be **clear, concise, and self-explanatory**. We shouldn’t get many (if any) clarifying phone calls after the memo is sent out.”*

*“As with everything we do, we want it to be **user-friendly and make it easy for principals to execute**. This might mean including “suggested steps” for announcing the change or a sample handout for students to take home. I’ll leave it to you to propose anything to go with the memo.”*

*“Strive for a **direct tone with no jargon**. Here’s a copy of the last announcement, which has a great tone, compared to this one from last year, which was too cumbersome.”*

Be specific about
OUTCOMES – not
process

Be detailed

Consider hard
measures and
“soft”

***For more hands
on situations:***

Given an example

Create a template

Key 3: Be specific about the OUTCOMES



What if YOU are not clear on the outcomes? What if the project/activity has never been done before? What are your options?

- Co-create the vision in a co-planning session together
- Train your team to ask questions to help you “mine” any expectations
- Take 15 minutes to consider your vision. . . it probably does exist, in some form – and then start pulling out the CFS from there.
- Start by thinking about what you don't want.

Your Turn: Setting Clear Expectations



Go back to your session worksheet (page 2), using the prompts to write notes related to this key for setting clear expectations.

Key 4: Make RESOURCES available (including yourself!)

“Carolina is a great editor, so you might pull her in for assistance when you get to that stage.

Feel free to use Robert’s help for the mail merge and shipping. Just give him a couple days notice so he’s not surprised.

Ask me any questions you have as you’re doing the work on the substance of the memo, about the outcomes we’ve discussed, or if you want me to mention this to Robert in advance.”

Consider:

Who else on the team has expertise and time to help

What role you want to play ongoing

External resources (“reach out to Brownsville, who has done this before”)

Your Turn: Setting Clear Expectations



Go back to your session worksheet (page 2), using the prompts to write notes related to this key for setting clear expectations.

Key 5: Be clear about CONSTRAINTS and relative PRIORITY

“The memo should be no more than 2 pages (front and back, not including the appendix).

Since this is time-sensitive, it should be your top priority. If you have questions about other work deadlines, let me know.

Our mail deadline is this Friday, and I’d like to see an outline and a draft before then. What do you think is a reasonable timeframe for the outline and draft?”

What are the non-negotiables?

What are the parameters/constraints for the work?

How does this fit into the rest of their work?

Your Turn: Setting Clear Expectations



Go back to your session worksheet (page 2), using the prompts to write notes related to this key for setting clear expectations.

Key 6: Have them REPEAT BACK the task/project

“I’ve just given you a lot of information. Will you write up a quick email summary of what you’re taking away and your next steps?”

Quick Tip: Make it match the task!

- EASY: Simple verbal repeat-back
- MEDIUM: Email summary
- HARD: Project plan

Your Turn: Setting Clear Expectations



Go back to your session worksheet (page 2), using the prompts to write notes related to this key for setting clear expectations.

Setting Clear Expectations: A Review

1. Specify roles
2. Provide appropriate background and context
3. Set specific outcomes
4. Make resources available
5. Be clear about constraints and priority
6. Do a repeat back!

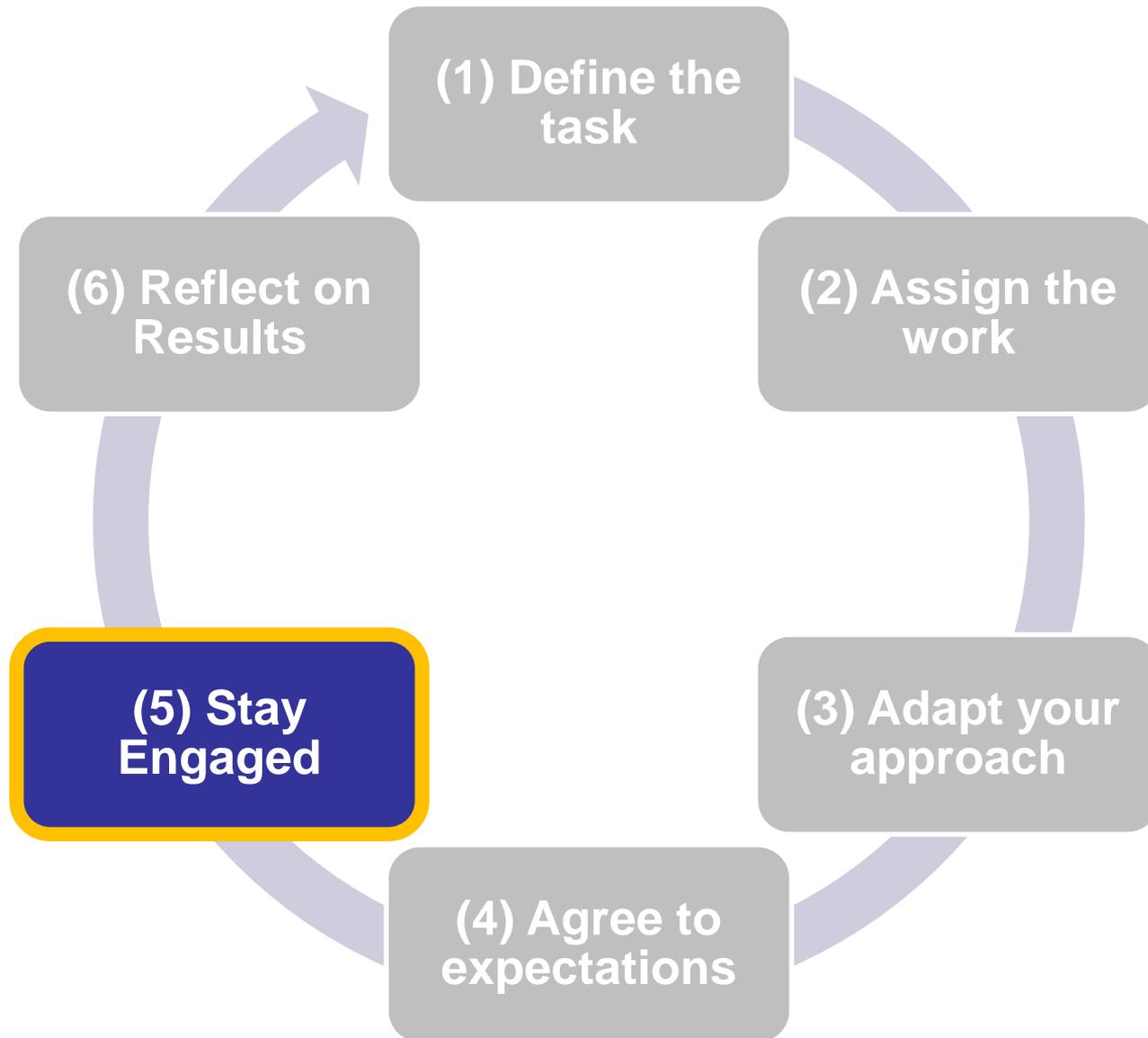
Role Play! Setting Expectations



Practice delivering what you've captured so far in your handout, with an emphasis on setting expectations.

- ✓ Partner 1:
 - Practice: 5 min
 - Debrief: 3 min
- ✓ Partner 2:
 - Practice: 5 min
 - Debrief: 3 min

Six Steps for effective delegation



Step #5: Stay engaged—Get your hands dirty!

GETTING YOUR HANDS DIRTY

Micro-managers

- Control the process

vs.

Hands-on managers

- Control the outcome



Method 1: “Checking In.”

- ***Determine in advance when/where you want to check-in
- Decide what is and is not important to you and be clear
- Review during regular check-ins versus ad hoc meetings (drop ins)

Ask SPECIFIC questions to avoid surface yes/no responses

How would you rephrase these questions?

- Are we under budget for the parent engagement dinner?
- Did the teachers like the training?
- Do you feel good about the policy training?

Method 2: “Seeing is Believing”

What this could look like:

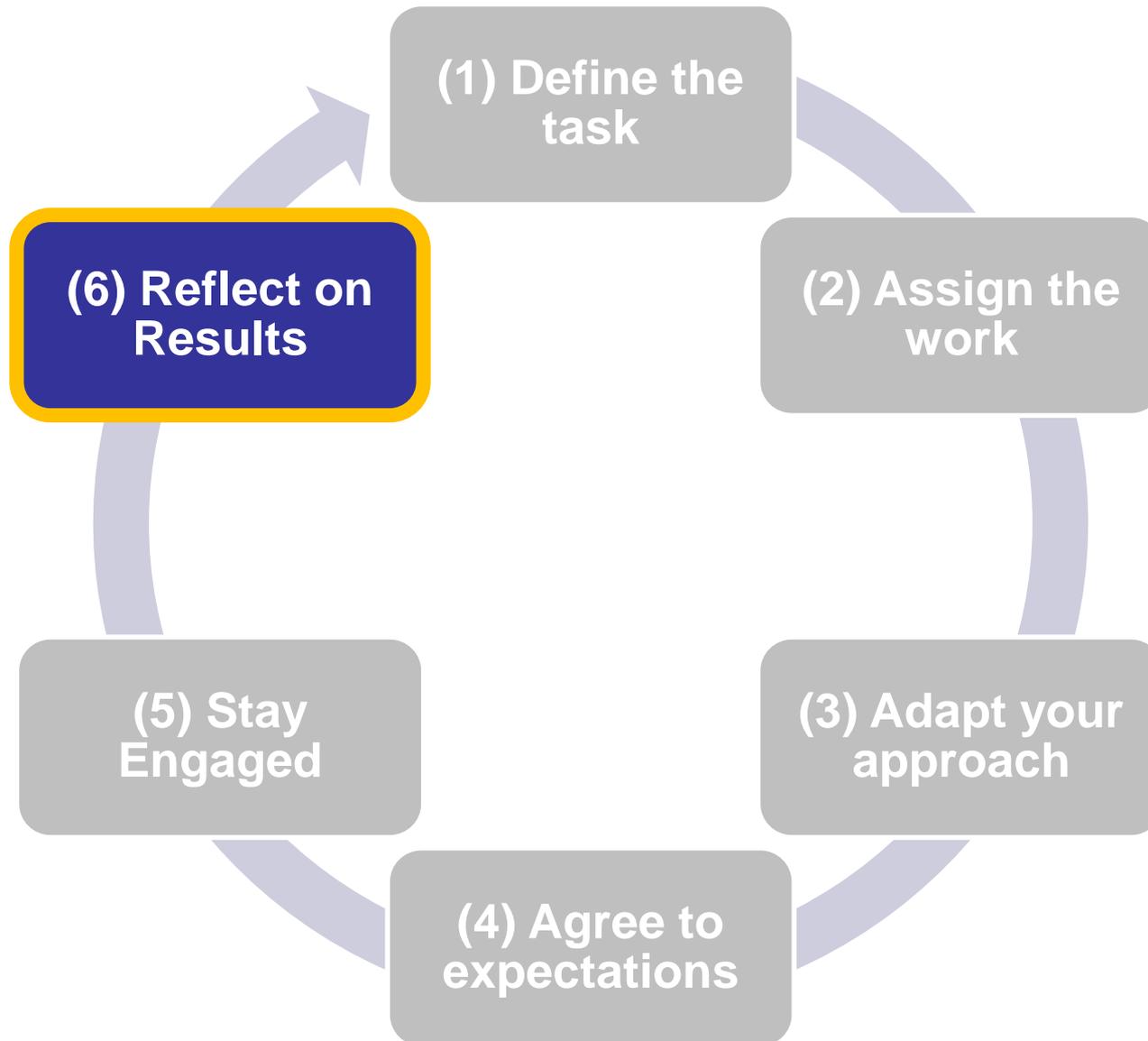
- Reviewing sample written work – Outline, intro, first draft
- Tracking/monitoring data
- Conducting “joint observations” (e.g., sit-in on a meeting, etc.)
 - *Note:* Always debrief a joint observation and discuss next steps.

Your Turn: Staying Engaged



**Go back to your session worksheet (page 3).
How will you stay engaged via check ins
and/or looking at work?**

Six Steps for effective delegation



Step #6: Reflecting on Results

Best Practices

- Schedule a debrief at the beginning of the process
- Make it clear that the “delegee” will lead the debrief by bringing strengths, challenges, and lessons learned (you can add yours in after)
- Have data available for a debrief
- Be clear that the purpose is to learn, not blame

Your Turn: Staying Engaged



**Go back to your session worksheet (page 3).
When and how will you reflect on
results?**

Summary

Clearly you will not do this worksheet every time you delegate a task or project – but the steps should all exist in some form in order to set people up for success.

It's critical to delegate well, because fundamentally, it is a talent development process.

How does delegating in this way serve to develop individual team members?

Role Play!



You're having a check-in meeting, and you learn that the project/task is not on track.

3 minutes/partner:

2 minutes to practice, 1 minute quick
feedback.

Closing: Think / Pair

What questions do you still have?

What key aha's/takeaways are you ending this session with?