Delegation Framework and Monitoring

The Core Principle

Delegation is one of the most difficult leadership skills. Delegate too little and you become a bottleneck. Delegate too much and you lose control. This checklist helps you find the right balance—delegating effectively while maintaining accountability and preventing micromanagement.

Part 1: Delegation Readiness

What are we delegating?

- [ ] Task/project: _____
- [ ] Why are we delegating this? _____
- [ ] What's the expected outcome? _____
- [ ] What's the timeline? _____

Delegation Criteria:

- [ ] Is this task suitable for delegation? [ ] Yes [ ] No
- [ ] Will delegating free up your time for higher priorities? [ ] Yes [ ] No
- [ ] Is there someone capable of doing this? [ ] Yes [ ] No
- [ ] Will this develop the other person's skills? [ ] Yes [ ] No

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Part 2: Delegate Selection

Who should we delegate to?

Candidate 1: _____

- [ ] Current skill level: [ ] Exceeds requirement [ ] Meets requirement [ ] Below requirement
- [ ] Willingness: [ ] Enthusiastic [ ] Willing [ ] Reluctant
- [ ] Capacity: [ ] Has bandwidth [ ] Tight but doable [ ] Overloaded
- [ ] Development opportunity: [ ] High [ ] Medium [ ] Low

Candidate 2: _____

- [ ] Current skill level: [ ] Exceeds requirement [ ] Meets requirement [ ] Below requirement
- [ ] Willingness: [ ] Enthusiastic [ ] Willing [ ] Reluctant
- [ ] Capacity: [ ] Has bandwidth [ ] Tight but doable [ ] Overloaded
- [ ] Development opportunity: [ ] High [ ] Medium [ ] Low

Selected Delegate: _____

Why this person?

Part 3: Clear Delegation

Have you clearly communicated the delegation?

Clarity Checklist:

- [ ] What needs to be done? _____
- [ ] Why is it important? _____
- [ ] When does it need to be done? _____
- [ ] What's the expected quality standard? _____
- [ ] What resources are available? _____
- [ ] What authority do they have? _____
- [ ] What are the constraints? _____
- [ ] How will success be measured? _____

Delegation Conversation:

- [ ] Have you had a delegation conversation? [ ] Yes [ ] No
- [ ] Did you explain the “why”? [ ] Yes [ ] No
- [ ] Did you clarify expectations? [ ] Yes [ ] No
- [ ] Did you ask if they have questions? [ ] Yes [ ] No
- [ ] Did you confirm understanding? [ ] Yes [ ] No

Part 4: Authority and Autonomy

What authority are you giving?

- [ ] Can they make decisions independently? [ ] Yes [ ] No [ ] Some decisions
- [ ] Do they need approval for certain decisions? [ ] Yes [ ] No
- [ ] What decisions require approval? _____
- [ ] What’s the approval threshold? _____

Autonomy Level:

- [ ] High autonomy (make decisions, report results)
- [ ] Medium autonomy (make decisions, get feedback, adjust)
- [ ] Low autonomy (check in before major decisions)

Monitoring Approach:

- [ ] How often will you check in? _____
- [ ] What will you monitor? _____
- [ ] How will you provide feedback? _____

Part 5: Support and Development

What support will they need?

Support Plan:

- [ ] Training needed: _____

- [ ] Resources needed: _____
- [ ] Who will they go to with questions? _____
- [ ] What's your availability? _____

Development Opportunity:

- [ ] What skills will they develop? _____
- [ ] How will you help them grow? _____
- [ ] What stretch will this provide? _____

Check-in Schedule:

- [ ] Initial check-in: _____
- [ ] Regular check-in frequency: _____
- [ ] Final review: _____

Part 6: Accountability and Monitoring

How will you maintain accountability?

Monitoring Plan:

- [ ] What metrics will you track? _____
- [ ] How often will you review? _____
- [ ] What's the escalation process if things go wrong? _____

Feedback Approach:

- [ ] How will you provide feedback? [ ] Regular 1:1s [ ] Scheduled reviews [ ] As-needed
- [ ] How will you celebrate successes? _____
- [ ] How will you address problems? _____

Micromanagement Prevention:

- [ ] Are you checking in too often? [ ] Yes [ ] No

- [ ] Are you second-guessing their decisions? [ ] Yes [ ] No
- [ ] Are you taking over the task? [ ] Yes [ ] No

Part 7: Completion and Learning

How will you close out the delegation?

Completion Checklist:

- [ ] Has the task been completed? [ ] Yes [ ] No
- [ ] Does it meet the quality standard? [ ] Yes [ ] No
- [ ] Was it completed on time? [ ] Yes [ ] No
- [ ] Did it stay within budget/resources? [ ] Yes [ ] No

Feedback and Recognition:

- [ ] Have you provided feedback? [ ] Yes [ ] No
- [ ] Have you recognized their success? [ ] Yes [ ] No
- [ ] Have you discussed what they learned? [ ] Yes [ ] No

Learning Capture:

- [ ] What went well? _____
- [ ] What could be improved? _____
- [ ] What did they learn? _____
- [ ] What will you do differently next time? _____
