Human Resources Tools

Delegation of Tasks and Projects

CCCO Cultural Careers Council Ontario
WorkInCulture.ca

NetGain partners

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Partners

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Steering Committee

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Daryl Novak, Southern Ontario Library Service
Bob Johnston, Executive Director, Cultural Careers Council Ontario (CCCO)
Susan Cohen, Program Manager, CCCO
Karen Ennis, Administrator, CCCO

Consultants

Clark Reed and his associates at NetGain Partners Inc.
NetGain Partners is a team of management, development and human resources specialists committed to helping cultural, other not-for-profit and public organizations reach their immediate and long-term goals.

All booklets in the HR Tools Series are available on line on the Information Section of CCCO's website at <u>www.workinculture.ca</u>

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Introduction

A major challenge for most cultural managers is having too much to do and insufficient resources – meaning staff and time, in the context of this HR guide – to get everything done properly.

It's also worth noting that anecdotal comments from cultural sector employees show that many want more responsibility as well as meaningful work that is clearly related to the success of the organizations in which they work.

Examples:

- An administrative assistant who does mostly routine work may be very interested in getting involved in coordinating patron events, receptions and opening nights.
- A volunteer coordinator may happily rise to the challenge of developing a comprehensive volunteer needs assessment for company activities.
- A planned giving officer may welcome the chance to take charge of writing all marketing materials on planned gift opportunities.

Is there an opportunity here for a manager to free up time for more senior-management-related activities and, at the same time, increase the contribution and job satisfaction of employees?

The answer is a resounding yes – through effective delegation.

As a management style, delegation lies somewhere between the extremes of the controlling micromanager who can't let anything go and the detached absentee manager who won't accept responsibility and is only too keen to offload it.

Somewhere between these two extremes is an opportunity for an overworked manager to offer employees expanded responsibilities within the organization, with a safety net. It's the place where employees can broaden their experience, knowing they will get reasonable support and time to learn.

WHAT IS DELEGATION?

There are three types of delegation:

- Ongoing assignment of and accountability for responsibilities
- Temporary assignment of all responsibilities (e.g:during vacation, illness)
- Assignment of specific tasks or projects

This module is with respect to the latter type of delegation. Delegation of tasks or projects is giving someone else the responsibility and authority to do something that would otherwise be done by yourself.

It is not "offloading" tasks that you don't want to do. If employees think you're merely throwing them unpleasant assignments, they will resent having to find extra time for boring or dead-end projects.

It is not abdication of your own responsibilities. You are *ultimately* accountable for the outcome of all your employees' work. So you need to set up checkpoints and reviews to monitor their progress.

Set clear goals and expectations for any new assignment including any boundaries or criteria. Then give people the latitude to discover for themselves the best way to succeed.

THE BENEFITS OF DELEGATION

- Frees up your time to focus beyond day-to-day activities. You could get involved in external activities that promote your organization's particular art form in the community or simply find more time for specific operational tasks/planning.
- Develops other people's skills and capabilities and strengthens the overall contribution of your work group.
- Will enhance the reputation of your organization as a great place for professionals to work and grow. When employees feel valued and trusted, word travels. After all, the cultural community is fairly small.
- Provides space for new ideas to be generated because other people are involved in the work.

By looking first at your own delegation skills, then at why managers often avoid delegating, we can identify what signs show a need to delegate, provide guidelines to planning what and how to delegate, and finally suggest ideas about how to handle individual issues.

Can You Delegate Effectively ?

Do you think you delegate effectively?

For some perspective on this, answer each of the statements below with the corresponding number, using the following code:

1 = always	2 = sometimes	3 = never

Your answer:
⇩

	I find that, without being asked, colleagues look for ways to relieve the pressures that I face as manager.
	I am free to "think big" about building the organization's role in the cultural community because colleagues and employees handle all the daily operational stuff.
	As my organization continues to grow and develop, I am totally comfortable letting go and putting others in charge of pieces of my workload – rather than clinging to control.
	I prefer to spend 30 minutes training an employee to do something new than to do it myself in five minutes.
	I say to an employee "Let me show you how to do that" far more than I think to myself "If I don't do it, it won't get done right."
	I look for opportunities to praise junior managers for delegating to their staff.
	I have time to plan ahead for the future development of my cultural organization.

	I am totally comfortable with people making mistakes when they take on new responsibilities.
	I have enough time for my family, recreation and vacation.
	I know what my top three work goals/priorities are and how they contribute to the success of my cultural organization.
	I ask my employees their opinion and ideas on what we are doing.
	I trust my employees to do things right.

WHAT YOUR SCORES MEAN

If your total score is 12 – 16, you probably delegate effectively.

This guide will likely reinforce much of what you are already doing and introduce you to some new aspects of delegation.

If your score is 18 – 28, you are on the road to delegating effectively.

But you need to raise your awareness and make a more concerted effort to coach others to take on more responsibility.

If you score over 28, you are not alone. And you're honest!

Many managers need to confront the fact that they just cannot do it all and that assigning tasks to others is a vital part of building a successful cultural organization.

Why Do Managers Avoid Delegating?

Despite the obvious advantages, many cultural managers do not delegate effectively for one or more of the following reasons:

- Lack of time

  ⇨ Delegating activities takes time. In the early stages, it may take longer for the job to be completed because you are coaching people and monitoring their progress. In time, with the right people, you will find that your coaching investment will pay off.

- Perfectionism – fear of mistakes

  ⇨ Just as you have to develop staff to do jobs quickly without your involvement, you have to let them make mistakes and help them to correct them.

- Enjoy "getting my hands dirty"

  ⇨ By doing everything yourself you will probably get things done effectively. But if employees are under-utilized, your management efforts may be seriously inefficient. When you are tempted to everything yourself bear in mind the cost of your time and your employees' time.

- Fear of surrendering authority

  ⇨ Whenever you delegate, you surrender some authority. This is inevitable. But the final responsibility is still yours and effective delegation gives you the benefits of increased time to do your job of managing.

- Fear of becoming
  expendable

⇨ When your work group is running smoothly with all appropriate work effectively delegated, it may appear that you have nothing to do. Actually you have the time to think, plan, improve operations and focus on improving your organization's profile in the cultural community.

- Belief that your staff "are
  not up to the job"

⇨ People will often under-perform if they are frustrated or bored. Effective delegation – assigning the right jobs to the right people and supporting them – will often re-vitalize them.

It is not uncommon for employees who are newly promoted to managerial positions in the cultural sector to have difficulty delegating. Often they were promoted because they were good at what they were doing. So they are tempted to continue trying to do their previous jobs, rather than train new staff to take on their old responsibilities. .

Signs of a Need to Delegate

Below are some signs that demonstrate a need to delegate.

Think about each pair of statements in relation to your own management role and the particular employees that you manage. Do either or both of the signals apply to you? Enter YES or NO in the right-hand column. YES answers need your attention.

Under continual pressure in your job, working long hours and taking work home.	
Unable to spare time away from the workplace; always needed to organize things and solve problems.	
Rarely able to think beyond day-to-day operations.	
Spending most of your time on "detail-oriented" tasks because you have to or you like doing them.	
Things not getting done because employees fail to fulfill their responsibilities.	
Some duplication of effort because of poor co-ordination between staff.	
Low morale, complaints or good staff members leaving to take positions in other cultural organizations.	
Staff skills not improving or broadening as you would like.	
Frequently having to step in and sort things out because staff cannot be relied on.	
Frequently interrupted by staff seeking decisions or solutions to problems.	
Staff failing to carry out delegated tasks properly.	
Staff not coming up to (development) expectations; taking too long to master tasks.	

For each YES answer, ask yourself
- ▶ What is the likely cause?
- ▶ What is the likely impact if this continues?

Review this checklist from time to time. Any YES answers mean you need to ask
- Are you delegating enough?
- Are you using *your* time in the best way?
- Are everyone's responsibilities clear and well balanced?

Planning What to Delegate

To determine what to delegate, it may be helpful to keep a log of your daily activities. After two weeks, review it and ask yourself if it truly reflects what you *should* be doing.

Here are some questions to help guide you.

▶ Which of my tasks <u>could</u> be done by one or more employees?

▶ Which of my tasks do not make a significant contribution to achieving the organization's goals?

▶ Which of my tasks take more time than I can afford?

▶ Which tasks do I do myself because I like doing them?

▶ Which of my tasks cause problems when I'm away because no one else can do them?

Important: When considering delegating, one of the most important things to consider is *ensuring staff get opportunities to learn and grow*. For example, you might offer others the opportunity to attend monthly networking meetings so that they can hear what other colleagues or organizations are doing.

What not to delegate:

▶ Hiring, firing or disciplinary matters

▶ Pay issues

▶ Developing organizational policy

▶ Any emergency or short-term tasks where there is simply not enough time to explain or coach

▶ Resolving morale problems

▶ A job that no one else in the organization is qualified to do

To Whom Should You Delegate ?

Take a look around at your employees and think about whose skills and interests most closely match the project or task at hand. Resist the temptation to pass the task/project to the person who has been the most competent over time or with whom you communicate most easily.

Look hard and objectively at what people are *good at* and *what they might enjoy doing beyond the normal content of their jobs*. A huge part of a manager's job is helping people develop new skills and fine-tune old ones.

REMEMBER – DELEGATION IS AN OFFER, NOT A DEMAND

Delegation happens when you *offer* an employee the opportunity to take on a task or project. It's an offer, not a demand. It isn't the same as assigning tasks that are already part of an employee's job description. Delegated tasks are tasks that are part of *your* job description, and employees should be made aware they have the right to say "no".

If you sense resistance to your offer of delegation, find out why. On the surface, the person may be pointing at the clock and saying he/she doesn't have time. In many cultural organizations where everyone is chronically overworked, this may be valid. But look more closely and you might find a fear of failure, or feelings of incompetence, or concern that that the organization lacks sufficient resources for the job to be done well.

If you believe that the "my plate is already full" response really is valid and you're confident this is the right person for the job, find ways to lighten the current load, or wait until the person is freer. Discuss it openly. Set benchmarks and goals for making time available, just as you would for the delegated task itself.

Record the tasks you want to delegate in a chart.

TASKS	STAFF		
	(Name)		
	Degree of Delegation: F, C or A		

Then show your delegating intentions for each person:

F — Delegate <u>full responsibility</u> for the task

C — Delegate <u>cover</u> responsibility in your absence

A — Delegate an <u>assisting</u> role, as part of an individual's longer term development or to provide necessary support in a task

A suggested template for planning your delegation is shown on the next page. When you have completed your delegating chart, consider total delegating plans for <u>all staff members</u> in turn and ask these questions:

▶ Do they have the ability to take on these further duties?

▶ Do they have the right attitude and confidence?

▶ Will they be able to handle the extra workload?

▶ Are you delegating enough to develop their skills and potential?

| DELEGATING CHART						
TASKS	**STAFF**					
Examples of tasks a development manager might want to delegate: ⬇ • Investigate potential to undertake a special fundraising event in the off-season • Oversee renewal of existing private sector partners • Recommend enhancements to the development office's activities for the coming season						

Levels of Delegation

Delegation isn't telling someone what to do. You can give an employee various degrees of freedom. The more experienced and reliable the other person is, the more freedom you can give. The more critical the task, the more cautious you need to be, especially if your job or reputation depends on getting a good result.

Involving the other person in agreeing on the level of delegated freedom for any particular responsibility is an essential part of the "contract" that you make with them. It's important to ask for the other person's input on the level of authority they feel comfortable with. Some people are naturally very confident; others less so. It's up to you to agree with them on the most appropriate level, so that the job is done effectively and as independently as possible.

Shown below is some language you might use when delegating. *(Of course, these are simple statements, used for clarity. You would probably be less abrupt.)*
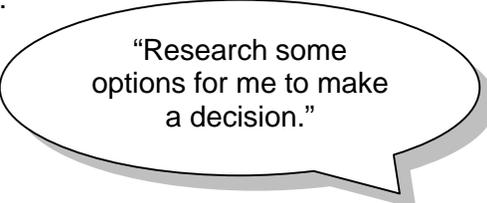
1.
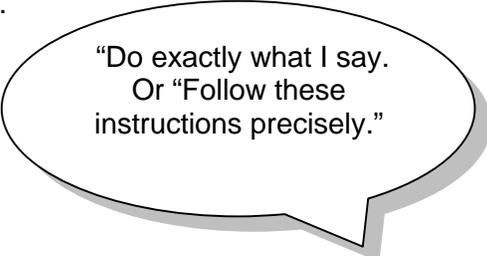
"Do exactly what I say. Or "Follow these instructions precisely."

Delegating, but without any freedom around implementation.

2.

"Research some options for me to make a decision."

You are asking for investigation, fact-finding or data gathering, but no recommendation.

3.

"Give me your recommendation and other options with the pros and cons for each. I'll let you know whether you can go ahead."

Asks for information and recommendations, for you to consider before moving ahead.

4.

"Decide and let me know your recommendations, but wait for my go ahead."

You trust their judgment and skill but they still need your approval

5.

"Decide and take action. You don't need to check back."

Greatest freedom you can give an employee while retaining responsibility for the activity. A high level of confidence is necessary, and you would normally assess the quality of the activity potentially weeks or months later.

6.

"Decide where action needs to be taken and manage the situation accordingly. It's your area of responsibility now."

The most freedom and not generally used without formal change in a person's job role. The delegation of a strategic responsibility – gives responsibility for defining the projects and tasks necessary to manage a particular area of responsibility, as well as how it is to be measured. Amounts to delegating part of your job. Might be used when developing a successor, or in a formal and agreed-upon plan to change job accountability.

A Psychological Contract

This is the agreement between you and an employee on tasks they are accepting and the expectations of them.

People cannot be held responsible for something to which they have not agreed, and they are more committed to delivering a service if they have agreed to do it. They may have some hesitations about the expectations in the context of the time-frame, resources, or budget, perhaps even the purpose and method. For all these reasons, employees should have the opportunity to discuss, question and suggest issues concerning expectations attached to a delegated task.

Deciding How to Delegate

When you have decided to delegate a particular activity to one of your staff, ask yourself how much help they need to master the task

Here are four suggested degrees of help you can provide:

BRIEFING	⇨	Explaining and agreeing on what they have to do.
DEMONSTRATING	⇨	Showing them how to perform the task, or having them do it with you; then checking that they can do it.
COACHING	⇨	Arranging a series of "experiences" that lead them into taking over the whole activity.
DEVELOPING	⇨	Arranging a more comprehensive development program, possibly including an off-the-job seminar or conference.

Consider these factors in deciding the degree of help to provide.

TASK DIFFICULTY	▶ How difficult is it to grasp this and perform it well?
TASK RISK	▶ Could you correct an error before it has negative consequences?
	▶ How costly would an error be? (Not just the financial cost but staff disruption, or the loss of funder goodwill.)
INDIVIDUAL'S ABILITY	▶ Can they already do this task or a similar one?
	▶ If not, are they capable of learning it?
INDIVIDUAL'S ATTITUDE	▶ Are they willing to take on new responsibility?
	▶ Do they have the confidence to handle it?

Monitoring Progress

Establish checkpoints with staff. This should be a collaborative discussion where you reach mutual agreement on the follow up process.

Below are three different levels of monitoring progress.

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1. You scrutinize and approve every step of the assignment before the person proceeds to the next stage*.*

    PRO: You can satisfy your urge to know what's going on throughout the process and ensure the work is completed satisfactorily. Many control-oriented managers prefer to keep a close watch on an assignment after they delegate it, especially if it involves a lot of detail and complicated content, or if mistakes could be costly in some way.

    CON: You might make your employee feel inadequate by "signing off" on each step. You risk showing them that you don't really trust them to think effectively for themselves. As well, it takes more of your time*.*

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2. You set a date to discuss their progress. You ask the employee to come to you with any questions along the way; but otherwise, you stay out of it.

    PRO: You give the person a chance to operate independently. Your hands-off role also frees you to do what's most important in your management job.

    CON: You may be in for an unpleasant surprise if the work isn't done well or in a timely fashion. You may also have no way of knowing how it's going unless the employee chooses to keep you informed.

    NOTE: Many cultural organizations have the advantage of working in a small office with a very small staff. "Advantage" you say? In this case it is because the manager can subtly monitor progress or provide coaching without losing much time. A small office also produces a more casual work environment, which means it's easy to ask a quick question or have a short discussion.

Tips for Delegating

So far we've suggested guidelines for deciding what to delegate, whom to delegate to, and how to delegate and monitor progress. Here are basic, commonsense ground rules for good management practice in delegating.

BEFORE	Plan	Plan any briefing or information session.
DURING	Be clear about results	Describe clearly what to do and the degree of "freedom."
	Explain why	Make sure they understand why the work is important and why they're being asked to do it.
	Give clear guidance	Present supporting information clearly and patiently.
	Check ability	If necessary, ask questions to check that they fully understand the delegated work. Don't assume that they have taken in your instructions.
	Build confidence	Show that you believe they're capable of carrying out the work successfully.
	Advise your team	Let everyone involved in the work or affected by it know that you have delegated the task to this person.
AFTER	Don't interfere	Give help when needed, but once they begin to feel confident let them get on with it. They may not do it the same way you would but this doesn't matter as long as the result is right.
	Control performance	It's important not to interfere, but it's also important not to forget about the task after you've given it to them.

Handling Individual Challenges

We are all different and we react differently to being given responsibility and authority. A lot of people respond well, but some may initially have problems with it. Here are some examples.

Theatre Manager
- Subscribers tell you they like dealing with a particular box office assistant who is helpful and pleasant. You need help making telephone calls to patrons to encourage subscription renewals and see real potential in this employee. But the assistant seems to lack confidence about taking on unfamiliar activities.

Gallery Director
- An archives manager has shown interest in new acquisitions and made insightful comments on their value to the gallery. You need help selecting new acquisitions and would like to involve this individual more. But the person appears to be timid about disagreeing with you – the "boss" – about potential acquisitions.

Cultural Service Organization Director

- The staff, always small, has recently been reduced by half. One remaining staff member has voluntarily taken over most of the duties of the departing staff in addition to her existing duties. As a result she is working increasingly long hours and showing signs of stress. Some details are falling through the cracks but you are reluctant to point that out. You have asked her to identify all her responsibilities and what she is willing to pass on to someone else, but she seems reluctant to relinquish anything.

Now here are some suggestions about how to encourage employees to accept greater responsibility and bolster their confidence

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PROBLEM	**ACTION**
1. "I'VE NEVER HAD RESPONSIBILITY" Young, or not used to taking responsibility. Reluctant to take the first step.	Start by managing closely, perhaps on a daily basis. Set short-term goals. Give encouragement and acknowledge progress until confidence is built up.

2.

"I WANT TO BE LIKED"

Avoids conflict. In a supervisory role, is reluctant to push employees.

Explain why you value their professional opinion. If you are delegating a management activity, point out that the shrewd use of (delegated) authority increases respect.

3.

"I'M IN CHARGE NOW"

Tends to act rashly, taking a hard line. May overstep their limits of authority.

Act immediately to help them understand and rectify a mistake.   Be persuasive rather than hard. If the problem continues, you may have to re-consider your decision to delegate.
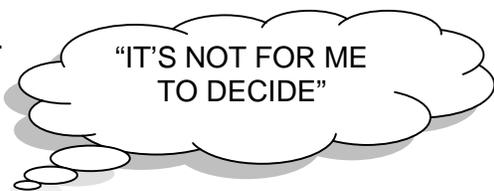

4.

"I'M INDISPENSABLE"

Tendency to be secretive about their work and lack an arrangement to cover their work in their absence.

If they seem insecure, make their standing and future clear to them insofar as you can. At the very least, have them draw up and implement a delegation chart so their work will be covered in their absence.

5.

"IT'S NOT FOR ME TO DECIDE"

Persistently referring decisions to you. Interrupting you on minor matters.

Reiterate the authority that you have delegated to them. Set short term goals for a while, and don't hold their hand – refer their minor queries back to them.

6.

"I'M WORRIED"

Nervous about making decisions. Expects the worst to happen.

Delegate less important tasks that don't put them in an uncomfortable position.   If they worry because of inexperience or lack of confidence, give them opportunities to develop confidence gradually. Start by playing an active supporting role and giving rapid feedback on performance.

Summary

Delegation is not an instinctive reaction for most people. It can be particularly difficult in some cultural organizations where managers are creating a new company, or breaking new ground with a particular art form. They may have a strong vision and feel they need to do everything and that only *they* can *get it right.* But effective cultural managers recognize the importance of delegation – both for their own success as leaders and for the overall health of the organization. They learn how to determine what should and should not be delegated and what it will take to help their employees be successful at delegated tasks.

Accept that delegation is important

In order to achieve goals you will devise specific objectives for your team and then determine what it will take to get there. This will most often involve relinquishing specific tasks and responsibilities to others so you can spend more time managing team members, enriching their skills and keeping morale high. Delegation is not just a nice thing to do – it is an essential thing.

Plan your delegation strategy

Think carefully about what tasks and responsibilities can be delegated. A machine gun approach in which task assignments are made on a whim or with little thought will create a chaotic work environment. First determine your own core responsibilities. Then, determine what responsibilities can be delegated. These will be activities that are important but don't define your role as team leader nor compromise your ability to manage if you hand them off.

Use common sense when delegating

Take a realistic look at your team before committing to delegation. If competent staff people are already working overtime to keep up with work, don't surprise them with the news that you're adding more to their plate. Discuss the reasons for delegating responsibilities with the individual and develop an implementation plan. It may be useful to share this discussion with the entire team to get feedback on how the process will affect them.

Following is a selection of popular books on the topic of delegation in the workplace:

"Delegating Authority"

Author: Andrew E. Schwartz (ISBN 0812049586)

- Looks at how poor delegation results in lower productivity and higher operating costs

"Management Guide to Delegating"

Author: Kate Keenan (ISBN 185304797X)

- A short book with simple guidelines on how best to manage yourself and your time .

"How to Delegate"

Author: Robert Heller (ISBN 0789428903)

- Common sense approach to delegating, very useful when you must confront serious basic problems focusing your direct reports on the work at hand.

"Delegating for Results"

Authors: Robert Maddux (ISBN 1560524553)

- Excellent worksheets to help managers clarify the results they're looking for, time frames involved, standards, best person for the job, and more.

"If You Want It Done Right, You Don't Have To Do It Yourself!: The Power of Effective Delegation"

Author: Donna M. Genett (ISBN 1884956324)

- Uses a somewhat simplistic story to get its point across (effectively), and contains an excellent "quick reference" sheet for delegating.