



NEW STATE CTE DIRECTOR LEADERSHIP PROGRAM

Module 6

Leading Your Team to Success

Summer 2019

Contents

How to Use the Modules.....	3
Module Objectives & Pre-Module Survey	4
Module Objectives	4
Getting Started.....	5
Preparing for This Module	5
Section 1: Building Your Bench	6
Developing People.....	6
Giving Feedback.....	7
Activity 1: Development in Action — What Choices Would You Make?	8
Activity 2: Staff Development Worksheet.....	9
Other Helpful Resources:	10
Building Your Bench.....	Error! Bookmark not defined.
Section 2: Delegating Effectively	12
Activity 1: Self-Diagnostic.....	12
The Delegation Cycle	13
Activity 1: Delegation Role Play.....	16
Activity 2: Delegation Worksheet.....	17
Delegating Effectively.....	Error! Bookmark not defined.
Final Reflections & Next Steps.....	19
Next Steps.....	19
Appendix A: Development Worksheet.....	19
Appendix B: Delegation Worksheet.....	21



Module 6

Leading Your Team to Success

How to Use the Modules

The New State CTE Director Leadership Program is designed to fit the natural learning curve of new State CTE Directors as they explore their state system for Career Technical Education (CTE) as well as the policies and decisions that undergird it. To that end, Advance CTE has developed a 12-month curriculum with two in-person meetings and monthly check-in calls to provide comprehensive supports to these new leaders. The program, with its curriculum, touch points and mentorship, is designed to allow new State Directors to access the support they need, when they need it.

//CURRICULUM//

- Strengthening Career and Technical Education for the 21st Century Act (Perkins V);
- CTE Programs of Study;
- Employer and Stakeholder Engagement;
- Data, Accountability and Evaluation; and
- Staffing and Management.

This curriculum is designed to help you be inquisitive about your state's current "state of play" in CTE; evaluate the responses and information you gather; see what gaps exist; and determine if, how and when you may want to take action. By answering the guiding questions and adding data where appropriate, you will be able to better visualize both where your state is currently and where you want to take your state system.

The modules are laid out to help you organize your thoughts and guide effective discussions with your mentor and Advance CTE staff, who can help you consider and benchmark your findings, as well as provide resources, support and targeted technical assistance as you work your way through the modules.

Disclaimer: The modules do not constitute or replace legal advice. We encourage you to check any relevant state and federal guidance and regulatory requirements to ensure compliance. Further, the examples listed within are not endorsements, nor should they be considered a comprehensive list.

Module Objectives & Pre-Module Survey

Module Objectives

This module is designed to help you be a successful and proactive manager and internal leader. While this module is by no means comprehensive, it is designed to help you get started by:

- Reviewing when and how to develop staff members;
- Exploring specific development techniques to use with staff, such as feedback, modeling and addressing performance issues;
- Mapping a plan to help staff develop a specific skill; and
- Breaking down how to delegate work effectively across your staff.

Pre-Module Survey

To begin this module, please take this [brief self-assessment](#), and choose the “Leading Your Team to Success” option.



Module 6

Leading Your Team to Success

Getting Started

Preparing for This Module

This module is different from the others because it is not about content. So there is no policy or regulation to dig up. Instead, we will ask you to look at your staff — and yourself as a manager.

The module is broken into the following sections:

- Building Your Bench; and
- Delegating Effectively.

To prepare for each section, we recommend the following:

Building Your Bench

- Complete the attached pre-reading (see Andrea's email) on "How to Develop People," a five-page excerpt from *Change the World: The Nonprofit Manager's Guide to Getting Results*.

Delegating Effectively

- Complete the attached pre-reading (see Andrea's email) for "Chapter 2: Managing Specific Tasks," an excerpt from *Change the World: The Nonprofit Manager's Guide to Getting Results*.



This module was developed with assistance from The Management Center and two sections from its 12-module Management Workout as well as the many free tools and resources available on its website: <http://www.managementcenter.org/>.

The Management Center is dedicated to helping leaders learn to run effective organizations to get better results. Previous clients have included state departments of education, small community non-profit organizations and even Advance CTE. We send our staff and managers through the various in-person trainings offered by The Management Center and have incorporated many of its

Section 1: Building Your Bench

Your state staff are essential team members not only in helping you carry out the duties of your office but also in achieving your state's vision for CTE. No matter if you are an army of one, a few or many, your role as State Director is to marshal the resources you need. In some cases, you might contract with other agencies or organizations to help, which still requires you to ensure that any contracted work is accurate and high quality, just as you would expect of work done by someone down the hall.

You can build your bench in many ways. You need to understand your staff, set and help them achieve ambitious goals, and hold them to high standards. When your expectations are not met, reflecting and giving thoughtful, candid feedback in real time is just as essential to help your staff correct course. As important as it is to give feedback, leaders should also be receptive to receiving feedback. Having a process for giving and receiving feedback will be key to helping your team learn and grow together in service of your broader goals.

We also recognize that as a manager working for state government or a state system, you most likely have established human resources rules around managing staff performance, which many even dictate how you must approach certain issues or evaluations. This section is not intended to circumvent any of those rules but rather to add tips and techniques to your existing toolbox. Additionally, unions and union-related issues are not addressed in this module given how these contexts vary from state to state.

According to The Management Center, you should keep three principles in mind when deciding when to invest in staff:

1. ***Invest in your best*** — Identify your rising stars and help them grow for the greatest pay-off in energy and time spent.
2. ***Know what you can change and what you cannot*** — Understand that you are not a superhero. Acknowledging the strengths and realistic development areas of your staff is the best starting place for building a team that complements each other and is well positioned to drive the work forward.
3. ***Distinguish between development needs and serious performance issues*** — Strike a balance but recognize when a staffer's performance requires support or a more direct intervention.

Developing People

Formal training programs can give your staff specific, concrete skills, but we know the impact of work-based learning for CTE learners — and the same holds true for your staff. Employees grow the most when they have opportunities to stretch themselves in pursuit of meaningful goals and projects that are supported by coaching from a manager to help them throughout the process.

KEEP IN MIND

Key Reading: How to Develop People

If you have not done so yet, skim the eight-page excerpt from *The Management Center's Change the World: The Nonprofit Manager's Guide to Getting Results* (from email)



Module 6

Leading Your Team to Success

Simply giving your staff members a task that you know will stretch them is not enough to ensure that the employee will grow successfully. In the activity below, you will see key techniques you can use to support your employees as they grow.

You may be wondering, “But what about motivation?” You can create the right environment to help people feel motivated, and if you have the right team assembled, you should not have to spend a lot of time or energy dedicated to this. Providing meaningful work with real responsibility and helping employees feel supported as they work toward ambitious goals are key roles that you can play as a manager. At times you will need to remind employees of the bigger picture or praise their progress, but ultimately, showing you care goes a long way to helping sustain a person’s motivation.

Giving Feedback

Feedback is tough both to give and to receive. Let’s be honest: Few people like doing it, and as a result, feedback is often avoided. The Management Center offers a great [worksheet](#) to help you think through how to give feedback. It recommends the SAW model:

- **Share** what you see;
- **Ask** questions; and
- **Wrap up** with next steps.

Giving feedback gets easier if it is built into your regular work. Here are a few ways you can systematize feedback:

- Put a “feedback” or “lessons” bullet into your regular check-in form, so it becomes something that is always done from week to week.
- Add “debriefs” to your calendar at the beginning of a project to ensure that you hold space for a feedback session at the end of all major projects. This time can be used to celebrate your staff members’ accomplishments as well as capture lessons learned while they are still fresh.
- Implement “SAW” in your office culture and vocabulary to help institutionalize the practice throughout your staff.

Ultimately, successfully giving and receiving feedback depends upon developing relationships, credibility and trust. If feedback feels punitive or like a “gotcha” moment, it is harder to accept or digest, but when someone feels like you are on their side, this process is much easier. To avoid the feeling of “gotcha” feedback, it is important that you as a manager practice recognizing good work when it happens and even solicit feedback about yourself.

Activity 1: Development in Action — What Choices Would You Make?

With the three development principles in mind — invest in your best, know what you can change, and understand performance versus development issues — let’s break down some techniques you can use to build skills:

Naming the Issue	Be specific about issues that staff need to work on. Labeling the challenges will help you and your staff members develop these skills.
Articulating Key Principles	Sometimes what seems obvious to you is not obvious to a staff member. After naming the issue, be clear about how to address it.
Providing Stretch Assignments	Assign staff increased responsibility that allows them to apply new skills or use well-established skills at a higher level and help them grow by doing.
Introducing One Piece at a Time	New challenges can paralyze some staff. Use this technique to complement the stretch assignment concept by gradually adding responsibilities or tasks.
Modeling the Skill	Use the “I do, we do, you do” approach to help staffers learn a new skill or competency.
Giving Direct Feedback	Provide feedback to a staffer during a project’s development. This technique can be a powerful tool and can exist on a continuum of positive/encouraging to developmental to corrective.
Providing Additional Resources	Consider supplementing your staff’s development skills by encouraging self-directed learning through books, articles, workshops, etc.

Development in Action — What Choices Would You Make?

Review each scenario below. In each of these situations, what development techniques would you use from the chart above? At what point, if any, would treating the situation as a performance problem rather than a development need make sense?

1. One of your program specialists has great curriculum development skills, but you would like her to improve her in-person presentations.
2. You have heard some complaints about your staff member who is responsible for monitoring local grant recipients and how he interacts with them.



Module 6

Leading Your Team to Success

3. Your soft-spoken staffer is having trouble managing a contractor who is causing delays on an important project, and so far he has hesitated push for a resolution.
4. A long-time staff member has shown resistance to your vision for CTE in the state and does not use the agreed-upon language and values when making public presentations.

Activity 2: Staff Development Worksheet

Use this worksheet to plan a development strategy for a staff member whose skills you would like to develop. You can access a blank copy of this worksheet in Appendix A.

I want to develop _____ in the following skill: _____.

The ideal outcome of my development efforts would be _____.

Does development make sense in this case?

Are any of the following true:

- ☐ I have tried developing this person in the past but have not seen significant improvement.
- ☐ I might be able to get this person to be okay at this skill, but I need someone who excels at it.
- ☐ I am not able to invest the amount of time that would be needed to guide the staff member to where I need that person to be.

If any of the above statements are true, you will probably need to address the issue not as a development need but as a serious performance problem.

Development Methods

I plan to use the following development methods (check all that apply):

☐ Naming the issue and giving direct feedback. Specifically, I will _____.

☐ Providing stretch assignments. Specifically, I will _____.

☐ Implementing structured doing (introducing one piece at a time or using "I do, we do, you do"). Specifically, I will _____.

☐ Modeling the skill. Specifically, I will _____.

☐ Providing additional resources. Specifically, I will _____.



I will meet with _____ on _____ to begin this work.

I will schedule a follow-up meeting on _____ to talk about progress.

Other Helpful Resources:

From Advance CTE:

In 2016, Vermont's State Director posed a question to the listserv about state CTE staffing levels. A similar question was posed about how CTE is governed in each state. You can check out the state responses to both requests [here](#).

A high-level summary of the state staffing request showed that the average number of state CTE staff across the 47 states was 20.9 staff members.

From The Management Center:

[Roles and Goals](#): Create meaningful roles and set clear, measurable goals with your staff through these worksheets and templates to help establish success and progress.

[Check-In Meetings](#): Structure successful check-in meetings using these tips.

[Managing Managers](#): You likely manage staff who manage others. Learn how to apply your own management skills differently to successfully manage managers.

[Managing Up](#): Often, you will have your own supervisors whom you will report to. Get some tips to help you communicate your needs to your manager.

[Retention Chart](#): Keep your star staff by using this simple chart.



Module 6

Leading Your Team to Success

KEY QUESTIONS: BUILDING YOUR BENCH

Answer the questions below in the space provided. While these questions are all optional, we encourage you to capture your thoughts here so that you can easily refer back to them.

Key Questions	State Response
What processes already exist in your office that enable staff to give and receive feedback both to individuals and for projects? How often are these mechanisms used, and how effective are they?	
How can staff give feedback to your office management currently? How often are these mechanisms used, and how effective are they?	
What policies are in place to provide staff with structured professional development opportunities?	
Which techniques shared in this section appeal to you and why? How do you plan to implement them in your regular work?	



Section 2: Delegating Effectively

Delegating the work is key to managing effectively. Yet, no matter where you are in your career journey, this skill is one of constant development and needs to be adapted to fit each team that you lead. While just doing the work yourself may sometimes feel easier, delegation is critical to building your team and ensuring that you have the capacity you need to achieve your goals and statewide vision for CTE. With that in mind, this section will review the basics of delegating.

Activity 1: Self-Diagnostic

Before we dig into this section, let's review how delegation plays out currently in your office.

Circle the answers that best describe your delegation practices. (Be honest! This diagnostic is solely to inform your own thinking, and you are the only one who will see it.)

1. When I delegate responsibilities, the work usually comes back to me:
 - a. Partly as I had hoped.
 - b. As I had hoped and by the deadline assigned.
 - c. In poor shape or not at all.
2. I often end up doing work myself because it is the only way I can be sure it will get done correctly.
 - a. True
 - b. False
3. Most of the guidance I give on a piece of work usually comes:
 - a. When I am assigning the work later on.
 - b. Once a piece of the work has been done that I can comment on.
 - c. Once the work has been finished.
4. It is clear who will play what role in a project — who ultimately owns it and is responsible for driving work forward, who should be consulted, who must approve it, and who is available to help with it.
 - a. Always
 - b. Usually
 - c. Sometimes
 - d. Rarely
5. I am not always confident that I know how work is progressing and sometimes worry that my staff member and I might be on different pages.
 - a. True
 - b. False
 - c. True with some people but not all

KEEP IN MIND

Key Reading: Managing Specific Tasks

If you have not done so yet, read the chapter about delegation from The Management Center's *Change the World: The Nonprofit Manager's Guide to Getting Results* (chapter found [here](#)).



Module 6

Leading Your Team to Success

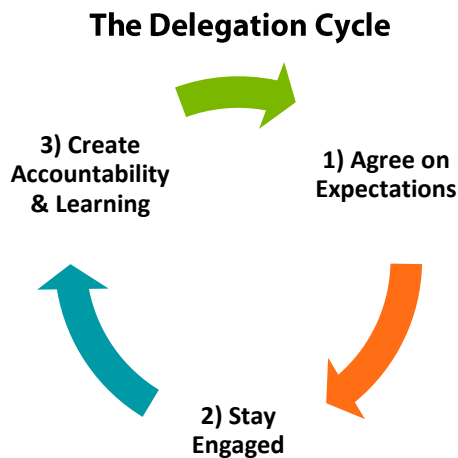
6. At the end of check-in meetings with staff, I ask them to repeat back the key decisions and next steps before leaving the room.
 - a. Most of the time
 - b. Only if staff members proactively offer
 - c. Rarely
 - d. Never
7. I check in and ask to see a piece of the work before it is completed.
 - a. Most of the time
 - b. Only if staff members proactively offer
 - c. Rarely
 - d. Never
8. When a project is over, I:
 - a. Always talk over how it went with the staff member responsible for it.
 - b. Try to make time to debrief, but it does not always happen.
 - c. Am usually on to the next thing.

The Delegation Cycle

According to The Management Center, managers should be more hands on in clearly communicating expectations for the outcomes of a given project or task to make sure they and their staff mutually understand how the work will proceed and what it should look like at the end. This clear communication also creates accountability and learning opportunities at the end of a given project to help your staff grow. The Management Center calls this “guide more, do less.”

In the chart below, you can see an illustration of the components of good delegation.

1. **Agree on expectations:** Ensure that your staff member understands what you want achieved. Consider using samples and templates to model and clarify your expectations.
2. **Stay engaged:** Make sure the work is on track to succeed before it is too late.
3. **Create accountability and learning:** Reinforce responsibility for good or bad results, and draw lessons for the future.



The fourth principle is an important one and often is one that you may do intuitively — adapt your approach to fit the person and project. Consider skill, will, difficulty and importance when assigning staff members to a project to set them — and you — up for success.

Now, let's review some tips and techniques you can use to help your staff manage their work, which will ultimately help you delegate effectively across your team.

MOCHA: Not Just a Coffee Drink

The Management Center encourages organizations to use a shared vocabulary for the roles and expectations within a given project. The center's preferred framework is known as [MOCHA](#), which helps give clarity around exactly what role each person is playing on a particular project or even on a broader, ongoing responsibility. This framework was adopted from the DARCI (Decider, Accountable, Responsible, Consulted, Informed) model.

Under The Management Center's version, MOCHA represents:

- M** Manager (assigns responsibility and holds owner accountable)
- O** Owner (has overall responsibility for project; ensures that all the work gets done)
- C** Consulted (should be asked for input and/or kept in the loop)
- H** Helper (is available to help do part of the work)
- A** Approver (signs off on decisions before they are final)

If your office or team is small, you may wish to combine some of these roles. At Advance CTE, we modified this framework to MOCA (Manager, Owner, Consulted, Assistant) by folding the Approver role into either the Manager or Consulted role based on the way we already carry out our work.

The Repeat-Back

Communication is a two-way street and is something managers often forget. Think back to a time you thought you were crystal-clear about your expectations for a given project, but when you received the final product from your staff, it looked vastly different from what you expected. Disrupt the workplace version of the childhood game "Telephone" by simply asking your staff to repeat back the expectations. You can do this verbally by asking at the end of a conversation, "Just to make sure we're on the same page, can you tell me what you're taking away from this?" Or for more complex projects, consider asking the staff member to send a brief email summarizing the assignment.

Seeing an Early Slice of the Work

Once you have established clear expectations and you have ensured that you and your staff are on the same page, continuing to check on the progress of the task or project you have assigned is important. Consider using the management technique of reviewing slices of the work. Seeing a small sample of the whole project can help your staff avoid putting substantial energy into a project that may be unintentionally going in a very different direction.

Keep Ownership Where It Belongs — With Your Staff

How many times have you delegated responsibility, but somehow the ownership transfers back to you? Perhaps staff are writing guidance for local administrators, and during a check-in, it is clear that the tone of the



Module 6

Leading Your Team to Success

guidance is not what you were hoping and your staff are frustrated. Resist the temptation to just re-write the guidance yourself. Encourage your staff to propose solutions themselves and empower them to fix the issues at hand.

Creating Accountability and Learning

This one is hard. A lot of work has to be done every day, and once a project gets across the finish line, you might feel urgency to just keep moving to the next task. Resist that feeling because creating accountability at the end of a process is a first step in setting expectations for future projects. Accountability can mean both rewarding and celebrating positive outcomes and discussing the things that can be improved. Consider building in these accountability meetings at the very beginning of a project to make sure they are simply a mutual expectation of the entire team and not something that feels punitive because they are scheduled only after a project does not go well.

Delegation Challenges

The Management Center's Management Workout module on delegation provides the following scenarios. Review the challenges and consider which of these happen in your office and how you might consider tackling them.

Challenge 1: Exactly what a project should look like is not clear.

Start by explaining that you are not entirely sure what the work should look like. By being transparent from the start, you will prevent your staff member from struggling to understand what your vision is, and instead you can focus on figuring out that vision together. From there, try to extract and articulate everything that you do know. For instance, you might say, "I know it needs to achieve X and Y, but we have to be careful in how we handle Z because that is a hot-button issue for some of our donors" or "It should have the same friendly but professional tone as the clean water website did."

Then ask your staff member to brainstorm with you (because you might find that while you cannot identify exactly what you need, your staff member can or that it emerges through your discussion). Afterward, delegate the final figuring-out: Ask your staff member to think about everything you have discussed and come back to you with a proposal for how to move forward. (And do not be shy about making process suggestions here if you have them — "start by talking to Marta," "make sure to estimate costs" and so forth.)

Once you have a plan, check back in earlier than you normally would to double-check that your staff member has a clear understanding of what success would look like, that you have not changed your mind or had further thoughts in the meantime, and that you are aligned about the plan for tackling the project or challenge.

Challenge 2: You cannot find the right person to whom you can delegate a particular project.

First, figure out why. Is there a skills gap on your team? A job vacancy? A performance problem? Is this a one-time situation that is unlikely to occur again?

Sometimes simply doing the work yourself might make sense, but make sure you understand why you ran into this situation and whether it is something that needs to be addressed or not. (And of course, if you find yourself regularly hesitant to delegate to someone who really should be able to do the work, then you are probably

facing a performance problem, not a delegation problem. If that is the case, you need to tackle that situation head on; this is a signal that it needs your attention.)

Challenge 3: You are unsure if you should delegate something to an already busy person.

Just because someone is busy does not mean you cannot delegate to that person. It just means that you have to give the person guidance on priorities. Should the new project take priority over the others? Should the person bump the others back? Let the person know how this fits in with the other items on his or her plate. And of course, be reasonable and realistic; do not expect someone to fit in more than can reasonably be done in a given period of time.

However, if the person is frequently too busy to take on new work, consider stepping back and reassessing the person's workload altogether. People need to have breathing room in their days so that they can go on vacation, take a sick day, have time to think about the bigger picture (not just put out fires) and stay sharp. (And if someone is frequently too busy to take on new work and you are confident that that is not warranted by actual workload, take a look at the person's fit for the role. Is the person overwhelmed because his or her skills or work habits are not the right match for the role?)

Challenge 4: The ownership for driving the project forward keeps coming back to you.

Instead of allowing ownership to come back to you, keep it squarely on your staff member's plate. For instance, if your staff member tells you that he or she is not on track to meet the project deadline for rolling out the new implementation guidance, do not take back the work; instead say, "At our meeting tomorrow, let's talk about what how we can get this timeline back on track." Or if you receive a draft of the implementation guidance with the wrong key points or framing, do not rewrite it; instead, talk with the staffer about what needs to be changed and ask that person to send you a new draft.

One exception to keeping the ownership where it belongs: If it is a crisis, intervening to ensure that you do get the results you need often makes sense — but in that case, you would then have a discussion with the staff member about why you had to step in.

Now, let's work through two activities designed to help you practice these delegation skills.

Activity 1: Delegation Role Play

Below are five scenarios you can use to practice your delegation and management techniques. Imagine how you would handle these situations, and consider doing these with another person, with one of you playing the manager and the other playing the staffer.

1. **No time to do it:** Staff member says, "I don't really have time to do this and everything else that's on my plate right now."
2. **Unsure how to do it:** Staff member says, "I'm not confident that I know how to do this. I'm not even sure where to start!"
3. **Unclear on what the manager wants:** Staff member says, "It's not clear to me exactly what this should look like."



Module 6

Leading Your Team to Success

4. **Whoops:** As a staff member, do a repeat-back of this project and get some key details wrong.
5. **Resisting a check-in:** When your manager tries to set up a time to check in on the work, you say, "Oh, I'm sure it'll go smoothly. I'll just get it to you once I'm finished rather than bothering with a piece of it partway through."

Activity 2: Delegation Worksheet

A clean copy of this worksheet can be found in Appendix B.

I am assigning _____ the responsibility of _____.

Agree On Expectations

1. WHAT does success look like on this assignment?

2. WHEN is the project due? How does this work fit with other priorities?

3. WHERE might the staff member go for resources?

4. WHY does this work matter, and why is this staff person the one to make it happen?

5. WHO else should be involved?

The MOCHA for this task is:

Manager	Owner	Consulted	Helper	Approver

6. Tips on HOW to do it (if any): _____

7. How will you make sure you and your staffer are aligned on key points and next steps?

☐ Verbal or written repeat-back ☐ Project plan ☐ Other: _____

Stay Engaged

1. What specific deliverables or activities will you want to review or see in action to monitor progress?

☐ Early on: ☐ Mid-stream: ☐ On the back end:

Adapt Your Approach

Given the difficulty and importance of the task and my staff member's skill and will for this task, my approach should generally be:

- a. Very hands on



- b. Moderately hands on
- c. Relatively hands off

<i>Key Questions</i>	<i>State Response</i>
Think back to a time when you delegated work and when it was completed, it was not what you anticipated. What, if anything, could you have done differently in the delegation process to prevent that situation?	
Think back to a time when you delegated work and it was completed successfully. How did the way you delegated it contribute to that success?	
In reviewing the range of work you do each day, what are three tasks you can start delegating to your staff?	
Name two techniques you plan to start using with your staff to empower them in their work.	



Module 6

Leading Your Team to Success

Final Reflections & Next Steps

Post-Module Survey

Please take this brief [post-module assessment](#) to let us know what you learned and how we can help.

Next Steps

Keeping the momentum of what you have unpacked through this module is essential. Most importantly, our sincerest hope is that you already have a list of concrete actions you will take as a result of this module. Some may be small steps or changes you can make today while others may require you to build a cohesive plan for more dramatic shifts in the future. Just know that we at Advance CTE stand ready to help as critical friends, content experts, and providers of professional development and technical assistance.

Appendix A: Development Worksheet

Use this worksheet to plan a development strategy for a staff member whose skills you would like to develop.

I want to develop _____ in the following skill: _____.

The ideal outcome of my development efforts would be _____.

Does development make sense in this case?

Are any of the following true:

- ☐ I have tried developing this person in the past but have not seen significant improvement.
- ☐ I might be able to get this person to be okay at this skill, but I need someone who excels at it.
- ☐ I am not able to invest the amount of time that would be needed to guide the staff member to where I need that person to be.

If any of the above statements are true, you will probably need to address the issue not as a development need but as a serious performance problem.

Development Methods

I plan to use the following development methods (*check all that apply*):

- ☐ Naming the issue and giving direct feedback. Specifically, I will _____.
- ☐ Providing stretch assignments. Specifically, I will _____.
- ☐ Implementing structured doing (introducing one piece at a time or using "I do, we do, you do"). Specifically, I will _____.
- ☐ Modeling the skill. Specifically, I will _____.
- ☐ Providing additional resources. Specifically, I will _____.

I will meet with _____ on _____ to begin this work.

I will schedule a follow-up meeting on _____ to talk about progress.



Module 6

Leading Your Team to Success

Appendix B: Delegation Worksheet

I am assigning _____ the responsibility of _____.

Agree On Expectations

1. WHAT does success look like on this assignment?

2. WHEN is the project due? How does this work fit with other priorities?

3. WHERE might the staff member go for resources?

4. WHY does this work matter, and why is this staff person the one to make it happen?

5. WHO else should be involved?

The MOCHA for this task is:

Manager	Owner	Consulted	Helper	Approver

6. Tips on HOW to do it (if any): _____

7. How will you make sure you and your staffer are aligned on key points and next steps?

☐ Verbal or written repeat-back ☐ Project plan ☐ Other: _____

Stay Engaged

1. What specific deliverables or activities will you want to review or see in action to monitor progress?

☐ Early on: ☐ Mid-stream: ☐ On the back end:

Adapt Your Approach

1. Given the difficulty and importance of the task and my staff member's skill and will for this task, my approach should generally be:

- a. Very hands on
- b. Moderately hands on
- c. Relatively hands off