CHAPTER 2

MANAGING SPECIFIC TASKS

Basic Delegation

Does either of these scenarios sound familiar to you?

- You ask your staff member to write a fundraising appeal for your new campaign. When you review the draft, the emphasis is on the wrong points and key pieces are missing, so you start editing it—and soon find that you've rewritten the entire piece. Your staffer is frustrated because it's not her letter anymore; it's yours. "Why didn't you just do it yourself to begin with?" she wants to know.
- The next time you assign your staff member a piece of writing, you try to give her more leeway so she doesn't feel micromanaged. But when you look at what she's written on the day it's scheduled to be mailed out, the tone is off, the pitch for funding isn't strong enough, and it doesn't feel compelling to you. You're frustrated and unhappy with it, and when you tell her, you can tell she's frustrated too.

If you're like most managers we work with, one, if not both, of these will ring true. In fact, many managers we know go back and forth between being too hands-on and too hands-off. Frequently a manager will start off at one extreme, discover that it doesn't get the desired results, and react by moving to the opposite extreme, only to find that doesn't work either. For instance, after giving staffers a great deal of leeway to run with a project and not having it go according to plan, a manager may vow to be involved in every step of the next project. And managers who get feedback that they've been too intensively involved will often start suppressing their natural desire to sit in on crucial project meetings and get interim project reports, inevitably to find out at the end of the project that they should have listened to their gut. At that point, it can be tempting to throw up your hands in exasperation and feel that you're damned if you do and damned if you don't.

It's no wonder managers get exasperated, because neither extreme works. In this chapter, we discuss how to get the balance right and will walk you through each step of good delegation.

EXACTLY HOW HANDS-ON SHOULD YOU BE?

Wouldn't it be nice if there were an easy answer to the question of how hands-on to be? ("Finally! Now I know that I should be 58 percent hands-on!") Although there's no one-size-fits-all formula, we've come to a paradoxical-sounding belief from our work with managers that most managers need to be more hands-on than they are—but also more hands-off.

Huh?

Contrary to the popular belief that managers just need to empower their people and let them go, we believe managers need to be significantly more hands-on in key respects. They need to be more hands-on in clearly communicating their expectations for the outcomes of the work, making sure they and their staff are on the same page about how the work will proceed, checking in on ongoing work, and creating accountability and learning at the end.

Guide more so your staff is more likely to succeed, and you'll be able to do less yourself.

At the same time, managers need to be more hands-off in actually doing the work. For every manager we see who's too hands-off in making expectations clear on the front end and in monitoring ongoing work, we see another (or often the same) who's too hands-on in pushing the day-to-day of the work forward and often doing much of it herself. The point of managing other people is to get more done than you would on your own, but too often we see managers fail to gain the benefit of having other people make the work happen.

We can sum up our advice in this way: guide more, do less.

You might be wondering whether following our advice won't actually take more of your time. In the long run, definitely not. *Guiding more* means that you may spend more time than you otherwise would in explaining a project at the start. You also might spend five minutes more than you did in the past reviewing data on progress along the way. But you'll radically increase the chances that whatever you're delegating will be a success. Everyone will be happier, and you'll ultimately get to *do* less because you won't end up redoing the work (and dealing with an unhappy staff member). Over time you'll be able to delegate bigger and bigger pieces of work and know that they'll come out successfully. When that happens, you can focus your energies on the work that only you can do.

THE COMPONENTS OF GOOD DELEGATION

What does guiding more and doing less look like in practice? As we mentioned in the introduction to this part of the book, there are three key steps to managing work generally and in the delegation process more specifically:

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

How exactly these principles apply depends on the context, so we'll discuss a fourth principle, which most people do intuitively: adapt your approach to fit the person and project. Figure 2.1 summarizes the basic process.

Ultimately this process is about setting your staff members up for success in their work. We've seen a lot of managers who think of delegation as consisting only of the first part of this cycle, that is, asking someone to complete a piece of work. But if you skip the next steps in the cycle, you're likely to find yourself in the situations we described in the opening of this chapter: frustrated that the work doesn't look like you'd envisioned it or doing too much of it yourself.

When you're assigning work, look for opportunities to make the assignment truly a conversation, as opposed to simply dictating every element. For instance, if there's flexibility in what the finished project should look like, ask the staff member what she thinks the outcome should be. You can also ask questions around the other pieces of delegation, such as, "So who else do you think needs to be involved?" and "Do we have samples that might be useful here?" and "What timeline makes sense?"

Now we'll walk through each of the four steps of the cycle.

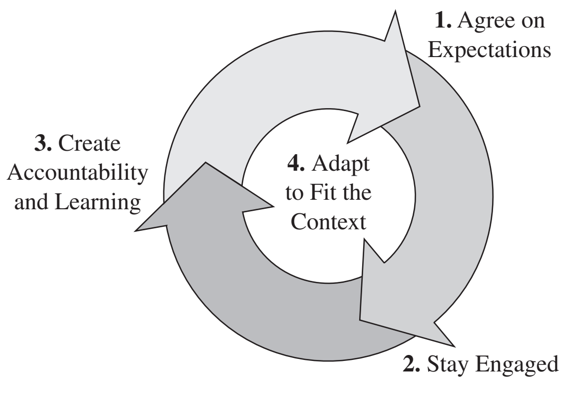

FIGURE 2.1. *The Delegation Cycle*

THE FIVE W'S AND AN H

Teach your staff to ask about the five W's if you haven't already communicated them:

Who: Who should be involved?

What: What does success look like on this?

When: When is the project due?

Where: Where might the staff member go for resources?

Why: Why does this work matter?

And a little bit of . . . ***How*** you should approach the work.

Step 1: Agree on Expectations

The first step in launching the work is for you and your staffer to come to a clear, shared understanding about what results you expect. It may sound straightforward, but it can be harder than you might think to get to the point where you and your staff would give the same answers to questions like, "What are you trying to accomplish?" and "What does success look like?" Just giving a quick rundown of the project usually won't get you there.

One way to do a better job of communicating your expectations is to remember the five W's from your high school English teacher, who probably taught you that every good news story begins by laying out the who, what, when, where, and why. When you're delegating, think about each of those W's, as well as a little bit of the How. We'll look closely at each piece, although we're taking a bit of creative license and covering the what before the who. And Tool 2.1 at the end of the chapter provides a worksheet to use when you are delegating work to your staff.

What Does Success Look Like for This Assignment?

Most managers we know hate being labeled micromanagers, and with good reason: micromanagers tell staff exactly how to do a project or, worse, do (or redo) the work for them. What will let you delegate effectively while not micromanaging is setting clear expectations for success. By being extremely clear about what you want achieved, you free your staff up to figure out how to get there, so you'll start by agreeing on what success will look like.

Sometimes identifying what success will look like is easy. For instance, when you are putting a staff member in charge of organizing a gala event, you might have a predetermined aim, such as raising net revenue of $250,000. But in other cases, the definition of success might not be as clear. In those cases, you might ask your staff to take the lead in proposing what a successful outcome would be, saying something like this: "You're in charge of logistics for this event. What do you think doing that successfully should look like?"

In either case, the outcomes that you and your staff agree to should be as specific as possible. Quantitative targets are often ideal, since they leave little room for misunderstanding. But quantifying outcomes isn't always feasible, so you can also agree on qualitative aims. In these cases, you should be as specific as you can about the qualitative target, that is, how you will know it when you see it. For the staff member you put in charge of logistics, the qualitative aim of having an event run smoothly might more specifically be, "Everything is set up and ready to go on time; if we run out of supplies, we have extras at the ready; we anticipate basic needs and provide for them; and we have someone ready to deal with extraordinary requests."

But sometimes even qualitative outcomes are hard to pin down. In these cases, making sure that your staff member understands the full context of what you're trying to accomplish can go a long way toward defining the outcome. For instance, in delegating a funding proposal, you could explain what the funder cares about and what will turn her off (the context), and you could explain that the finished document needs to resonate emotionally with the donor and convince her that the project is in line with her interests and goals (the outcome).

Finally, don't define the task too narrowly. For instance, let's say you're preparing for an upcoming meeting and you'd like your assistant to help make it go smoothly. Many managers in this situation will give the assistant specific tasks to do, such as, "Please check that there are enough pads and pens in the conference room, and make sure people are offered water and coffee." But a broader, and often much more effective, approach is to tell the assistant that she's in charge of all logistics preparations for the meeting. The first time you do this, you'd agree on what that should look like, but from there, she'd take on the broad responsibility of ensuring smooth logistics. That way, she'd presumably take the initiative to clear the unrelated papers from the conference table that you didn't even realize were there, ensure the speakerphone is set up and ready to go, and do all kinds of other tasks that you might not have thought to assign. This broader approach will make the assistant's job more challenging and your life easier, and it will get the job done better than if you'd assigned it more narrowly.

So when you're addressing success, go broad, not narrow.

USE SAMPLES AND TEMPLATES TO CLARIFY When possible, offering samples can be an incredibly useful way to give your staff a clearer idea of what you're looking for. For example, if you and your head of communications agree that the Web site she is developing should look "clean and crisp," you might send her links to sites that you feel look that way. Similarly, you could give your new development director a successful grant proposal from a previous year to show her the tone and style she should be striving for in this year's report.

If the assignment is a new type of work, providing a template can help structure the work in the way you're envisioning. For example, rather than simply asking a staff member to give you research about other organizations working on a particular issue, you might create a chart with the specific headings you are looking for (for instance, organization name, mission, budget, and so forth) and have her fill it in.

> "Make sure your staff members can answer the question,
> 'What do I have to do to delight my boss?'"
>
> PETER B. LEWIS, CHAIRMAN, PROGRESSIVE CORPORATION

Who Should Be Involved?

However broadly you define the task, be unambiguous with your staff member that she is ultimately responsible for it. Too often we hear managers say, "Can you help me with logistics for the meeting?" when what they really mean to say is, "You're in charge of making sure logistics for the meeting go smoothly." The key here is to make sure your staff member understands that she is the owner—a word we love—of the task. She might call on you or others for ideas or even help with the task, but she is the one making sure that all of the helpers do their jobs and that the task is done well.

One way to instill the idea of ownership is to use a simple tool we call MOCHA, an acronym for the different roles for a piece of work. We developed it because we had a lot of clients who rightly placed a high value on inclusion, and therefore had projects that ended up involving lots of people. Too often, though, those projects devolved into confusion when people were not clear on their roles and the project lacked a clear driver or decision maker.

In projects where a number of people are playing roles, then, being clear about the who is key. MOCHA helps solve the who issue by providing a standard vocabulary within the organization for describing how people might be involved. (You can remember "MOCHA" because if you get this right, your job becomes easier and you can sit at a café all day sipping mochas.) Here's what the different pieces of MOCHA stand for:[1]

Manager	Assigns responsibility and holds owner accountable. Makes suggestions, asks hard questions, reviews progress, serves as a resource, and intervenes if the work is off track.
Owner	Has overall responsibility for the success or failure of the project. Ensures that all the work gets done (directly or with helpers) and that others are involved appropriately. There should be only one owner.
Consulted	Should be asked for input or needs to be bought in to the project.
Helper	Available to help do part of the work.
Approver	Signs off on decisions before they're final. May be the manager, though might also be the executive director, external partner, or board chair.

[1] We adapted this model from the DARCI decision-making model taught in some programs: Decider, Accountable, Responsible, Consulted, Informed.

GIVE WORK TO THE RIGHT PERSON We sometimes see managers fail at delegation because they assign a project to the wrong person in the first place, trying to fit a round peg into a square hole—for example, assigning the artistic director, who is a creative genius but a disaster with numbers, to prepare a detailed project budget. When delegating work, consider who has the talent and skills to get the job done rather than who should be able to do the task at hand given her background or position. Of course, if you regularly find yourself reluctant to delegate a responsibility that the staff member in that position should be able to handle, you need to assess whether that person is a good fit for the role and determine an appropriate course of action. We discuss this and other performance issues in Chapter Nine.

Let's say that you're a development director and your development associate is in charge of the upcoming gala. You might be the M (manager) on this project, and the associate would be the O (owner). The communications director and program director should be consulted (C), the development assistant is an H (helper), and the executive director might be both an H (helper by making calls to the largest donors to ask them to buy tables) and the A (approver on the final program and the table assignments).

If you do nothing else when you're delegating, make sure that there's a clear owner for making the project succeed. The owner might then figure out the rest of the MOCHA, but you need to know who is responsible for making the project successful. In fact, one way to think about your challenge as you take on more and more management responsibility is to recognize that your job is to go from being an owner to being a manager. That means that as you find yourself the owner of specific responsibilities, you might be asking yourself, "Should I really be the owner on this, or should I be handing that over to someone else?"

When Is the Project Due?

We realize it sounds obvious to be clear about the when, but we'll say it anyway: make sure your staff member knows when the project is due and where it falls relative to her other priorities. Over and over again, we see managers who delegate a project without being explicit about the due date, expecting it to be finished or at least well under way a week later, and then check back in and discover that the staffer hasn't started it yet. Again, it comes down to being clear about your expectations: state the timeline you expect and how the work fits with other priorities.

It's okay to leave the timing up to the staffer, but be specific about any qualifiers attached to that. You might say something like, "There's no rush for this, so it's fine to do it as time allows, but it should be wrapped up by August. This isn't as important as the memo for the board, so you can turn to it after that." You can also make this part very much a conversation by asking your staff member when she thinks it would be reasonable to have the work done and how she sees it fitting in with her other priorities.

Where Might the Staff Member Go for Resources?

What money, people, supplies, and other tools can your staff member use? Is there a rough budget for the project? Are there other people with expertise on this issue to whom she might turn (you might capture these people within the MOCHA as those who are consulted or helpers).

Within that list, one of the most valuable resources you can offer your staff is your own time. Make it clear that staffers can approach you to clarify expectations, answer questions, review progress, and help brainstorm solutions. In doing this, make sure that they maintain ownership of the project, so a staffer can say, "I'm wrestling with X. The best solution I can come up with is ABC, but I worry that it's not the most cost-effective approach. Do you have any suggestions about other options I might consider?" Staffers shouldn't say, "I'm stuck on X. What should I do?"

Why Does This Work Matter?

Finally, both of us have been guilty of giving assignments in a hurry without explaining where the project is coming from and why it matters, and even why we've chosen to give it to the person we're asking to handle it. We've both also gotten reasonably good outcomes at times when we have skipped this step, but each time we do it well, we've been struck by how much more excitement and buy-in we've seen when we communicate the why of a project as staff members go from compliance to commitment. For instance, if you're asking your assistant to handle the logistics for an upcoming funder visit to your office, you might remind her that the funder has shown interest in the organization but hasn't yet committed, that the funder in the past has been skeptical of grassroots organizations like yours so you want to make sure you look extra "on the ball," and that your assistant did such a good job organizing the community dinner that you know she can make this visit a smashing success.

. . . And a Little Bit of How You Should Approach the Work

The standard line in management textbooks is that if you have good people, you shouldn't need to tell them how to do everything. This is largely true, and by being clear with your staff about what success looks like, you're freeing them up to think about how to get there.

That said, if you have input about the project, you should give it to your staff member on the front end. There are few things more frustrating for staff members than putting the effort in figuring out something you already knew. If you know from experience that having a Web site vendor in a different city has been a nightmare in the past, don't hesitate to tell your head of communications that.

Similarly, make sure you mention any constraints that the staff member should be aware of. These might be constraints around the process (such as who needs to sign off on an item before it goes out the door) or the substance (such as items to include in the budget). For instance, in the Web design example, you might ask your staff member to submit draft design options to the head of development before she makes a final recommendation (a process constraint). You might also indicate that the organization's logo must appear on every page (a substantive constraint).

Agreeing on How to Move Forward

Once you've shared your expectations for the project, the final step in the expectations stage is to make sure your staff member understands the assignment and, where relevant, creates a plan of attack.

The repeat-back. As we mentioned earlier, time and time again we see managers who think they have been crystal clear about their expectations and then are shocked to discover that their staff members heard something very different. We're often reminded of the children's game of telephone, where a whispered message gets passed from person to person and comes out humorously different at the end than it was at the beginning.

The best way to prevent this telephone syndrome and to be sure your staff member understands the project the way you do is simple: ask. That is, find a way to get your staff member to repeat back to you what she has taken the assignment to be. In simple cases, the repeat-back might be verbal. Before ending a discussion about an assignment, you might simply say, "So, just to make sure we're on the same page, can you tell me what you're taking away from this?" When an assignment is more complicated or will take more than a day or two to complete, you might ask the staff member to send you a brief e-mail summarizing the assignment, including expected outcomes and next steps—for example:

> Hi Jenny,
>
> Here's what I took from our discussion about the memo for the field volunteers:
>
> - Should include targets (and rationale)
> - Should be short (fewer than 3 pages)
> - Could be like the health care memo from last month
> - Deadline: out the door next Friday; I'll send you an outline this Friday
>
> Let me know if I'm missing anything here. Thanks—
>
> Alice

This might feel awkward at first, but you can even blame your own fallibility by saying something like, "I know I'm not always as clear as I think I am, so just to make sure there's nothing lost in translation, can you take five minutes to capture what we've agreed to here and e-mail it back to me, so we both have down what we've agreed to?" Almost invariably, in looking back over the e-mail, you'll find one or two details where you and the staff member weren't aligned.

The plan. The quick verbal summary and the five-minute e-mail are less formal versions of what can become a more extensive plan on more complicated projects. The level of

AVOID THE GAME OF TELEPHONE WITH THE REPEAT-BACK A simple, "Can you tell me what you're taking away?" can help to ensure that you and the staff member are in agreement on what needs to be done before she spends hours on something that doesn't line up with what you have in mind.

detail will vary from situation to situation, but the basic ingredients of any plan include the key activities needed to reach the desired outcomes, a timeline for when those activities will occur, and who is responsible for each step. In other words, plans should spell out who will do what by when.

For complex projects, ask your staff member to create a written plan that will be the staff member's tool for juggling the work's many pieces; it should include information about each step, interim deadlines, and notes on MOCHA-type stakeholders. For instance, if your staff member is organizing a conference, the plan would cover steps associated with choosing the venue, designing and printing invitations, developing the agenda, and confirming speakers. The plan should be in a format that is easy to update, since your staff member will likely be making small adjustments to those interim deadlines as the work progresses. Because this sort of planning requires your staff member to think through each step and plan backward, she may spot early steps (like securing a venue) that could otherwise have slipped until too late.

While your staff members should take the lead in proposing the plan, as the manager you should ensure that it's realistic and as comprehensive as it needs to be. This might mean asking questions about the plan ("Is it really possible for you to go from mock-ups of the Web pages to having the pages coded within two weeks as you've proposed?") and making recommendations based on your expertise and experience ("I worked with vendors on a Web site remotely once, and it was a disaster. You might think about finding someone you could easily meet with in person"). Don't be shy about playing the role of skeptic, pushing against the plan and the results to date to help the staff member refine the plan. The ideal outcome is a plan that is better than either you or your staff member might have developed on your own. Tool 2.2 provides a sample project plan.

Step 2: Stay Engaged

Now that you and your staff member have gotten crystal clear about what you expect, you're done, right? Not if you care about results. Time after time, we see managers who think they have been totally clear about what they expect end up surprised by the implementation gap, where what happens in practice looks very different from what they expected. That's because the most common way managers fail at delegating is by not staying involved to check on progress.

You can avoid the implementation gap by continuing to engage with your staff during the course of the work, getting a sense of how the work is proceeding, and making sure that tasks are either completed according to plan or that the plan is adapted as needed. Managers sometimes feel awkward about doing this, but you can be direct with your staff. Tell them that you're hoping to check in on things along the way, both to see how things are going so you can help them avoid any implementation gap and so that you can serve as a better resource to them.

There are a lot of ways to ensure your staff is making progress, but four of the most powerful are checking in with staff directly, reviewing interim work, reviewing data, and seeing the work for yourself firsthand.

Checking In with Staff Directly

Checking in can be done by e-mail, phone calls, or in-person conversations, including regular weekly meetings, meetings on specific topics, and quick stop-bys to see how things are going.

Regardless of the exact forum, in addition to being helpful on whatever issues your staff member might raise, your job is to ask probing questions that get beneath the surface to make sure that work is on track. For instance, in preparing for an upcoming conference, rather than simply asking, "So, is everything going okay?" and receiving a yes answer, you might ask your staff to review progress against the plan, discuss steps around a particularly tough issue ("How are you approaching the issue of diversity on the panels?"), and report on the number of confirmed attendees and speakers.

In formulating these questions, think about what could go wrong, and probe around those areas in particular. Don't let yourself assume things are proceeding smoothly; assume your job is to look for trouble, not to assume things are proceeding smoothly. You can do this in a tone that won't make your staffer think that you lack confidence in her, and you might even quickly agree with her that you're going to do it. For instance, you might say, "So I know we really want this to go smoothly.

PROJECT PLANNING: THE FOUR S'S

In creating a project plan, your staff members might think through the Four S's:

1. *Success:* What are the desired outcomes of the project?
2. *Streams:* What are the main categories of work?
3. *Steps:* What are the specific, detailed steps that need to happen within each stream of the project?
4. *Stakeholders:* Who else needs to be involved, and how? Use MOCHA as a tool to think through who needs to be involved in what.

Can I ask you about some of the areas where I've seen events like this go wrong in the past?" Then you might ask questions like, "Do we know how the hotel will deal with malfunctioning equipment?" and "Is there anything we can do to be prepared to accommodate attendees with disabilities?" You could even ask, "What could go wrong? What's your worst-case scenario?" and brainstorm about ways to address those possibilities.

Reviewing a Slice of the Work

One pattern happens over and over: you assign a piece of writing, your staff member spends two weeks on it, and when it comes back to you, it's not at all what you were picturing. Many managers think to ask for a draft in advance, but even at that stage, your staff member has put significant time into the project. A less common but very helpful technique here can be to ask to see a small sample of the whole before the person has put substantial energy into getting all the way through it. For instance, you might ask for a short segment of a document, an outline of an argument, or one page from the new Web design before the whole site is created. Or if you have an intern preparing references for a report, you might ask to see the first three citations to make sure the format she is using is correct. The basic idea is that just as you don't need to eat a whole pie to know how it tastes, you can sample a small piece of the work to know whether it's on track, and thereby save tremendous frustration down the road after your staff member has put significant energy into a more finished product.

Reviewing Data

Also ask to see regular reports with data indicating progress toward the desired outcome—for instance, a weekly report on progress toward a fundraising goal, a monthly chart showing Web site traffic compared to prior months, or a weekly list of targeted lawmakers and their positions on a pending piece of legislation. As part of delegating the work originally, you might think about what data will be meaningful to monitor along the way and how often, or even better, ask your staff member, "What data can we look at along the way to make sure this is on track?" so she can propose the best approach.

Seeing the Work Firsthand

A less common but extremely powerful way to see how things are going is to directly observe the work in action. Staff members might be completely forthright in reporting on progress, but managers often find that getting a feel for the actual work leads them to a much greater understanding of what is going on. For instance, joining your staff on a lobby visit, sitting in on a media training, attending a meeting with a prospective funder to hear your staff's pitch, or observing a phone bank to see how volunteers deliver an agreed-on appeal can all offer valuable insights into how what is happening in reality compares to what was outlined in the plan.

When you're managing work that's executed outside the office (as opposed to, say, overseeing a team that is producing reports that you will see directly), seeing the work firsthand is particularly important. If your organization runs training programs, sit in on some of them. If you're running a ballot initiative campaign in another state, make site visits to observe how the work is being run on the ground. One executive director we know started sitting in (with permission) on randomly selected calls between his head of regional operations and the organization's regional staff. He was shocked to discover how different what was happening in the field was from what he had been assuming.

To explain to your staff member why you're doing this, you might say something like, "I want to stay in touch with how all our grand plans are really playing out, so I'm going to be getting out into the field or on to your calls every once in a while to see how things are going in practice," or "I want to stay in touch with how things are playing out in the field so I can be a better resource to you."

Firsthand observation also helps you serve as a resource to your staff members as they consider changing the plan to reflect how things are playing out in the real world. Ideally, you would conduct observations like these with your staff member at your side, so that both of you have the same facts about how things are unfolding. Following these observations, you should debrief with your staff to share your impressions and make sure that there is agreement about any changes going forward. In the ballot initiative campaign, the executive director sat down with his head of regional operations so they could debrief the calls, acknowledge what wasn't working as expected, and generate solutions.

KEEP THE MONKEY ON YOUR STAFFER'S BACK

Once you've delegated a responsibility, make sure you keep the ownership for the project squarely with the staff member. Authors William Oncken Jr. and Donald Wass suggest thinking of each project or task as a monkey someone is carrying around on her back. When you assign a project to a staffer, you're handing over the monkey. But often that staffer will find ways to return the monkey to your back. For instance, if you see that a phone bank script isn't working well, don't "take the monkey back" by rewriting the script. Rather, after you talk with your staffer about the elements that need changing, she should do the rewrite so that the monkey stays on your staffer's back and doesn't hop back to yours.

Commonly, taking back the monkey happens in response to a seemingly legitimate question. Rather than suggesting solutions yourself, try to get the staff member to propose solutions herself. "What do you think?" is a great question to use in ensuring you don't inadvertently take on monkeys you have delegated.

For a more complete explanation of how to ensure that staff members do not pass the buck back to their managers, see William Oncken Jr. and Donald Wass, "Management Time: Who's Got the Monkey?" *Harvard Business Review,* November–December 1999.

Step 3: Create Accountability and Learning

We recently met with a frustrated manager who had delegated the task of writing an important memo to one of his staff members. He had set expectations appropriately, made sure the staff member understood them, and reviewed a draft along the way to make sure it was on track. The end product, though, was missing a crucial ingredient, and the manager's reaction was typical: "This just shows that you can't delegate anything and expect it to get done right!"

Although we shared his frustration, we reminded him that there was one more piece to the delegation process he needed to pursue: creating accountability. He needed to go back to the author of the letter and in a direct and assertive but not hostile way, share his reaction to it (see Chapter Ten). By doing this, the manager would get the product he wanted; perhaps more important, he would set himself up for better results the next time by sending a clear message that slipshod work was not acceptable.

Creating accountability at the end of a process is the first step in setting expectations for the next iteration of the delegation cycle. Fundamentally the message is, "I mean what I say." Of course, this goes for rewarding positive outcomes as well. When staff members have done a good job and produced the desired results, managers should recognize their effort and celebrate their success, so staff members know that doing things well matters.

In addition to reinforcing responsibilities, the accountability stage can produce lessons for the future. Even when a project has gone well, both you and your staffer have likely learned from the experience and seen parts of it that could be done differently next time to get even better results. A write-up of these lessons, even as a quick bulleted list, can be an invaluable resource the next time you conduct a similar project. One small step that can make a large difference in producing lessons and accountability is to schedule or, better yet, have your staff member schedule a brief reflection meeting for the end of a project and to get it on the calendar right from the start so it doesn't feel punitive when you suggest it at the end.

DON'T PUNISH THE WHOLE CLASS We occasionally see managers who are trying to hold a group accountable for the actions of individuals. When you're trying to make clear that you mean what you say, you'll be much more effective if you deliver that message to one person at a time. For instance, if three of your staffers miss a deadline you've set, you'll create a culture of accountability more quickly by going to each of the three individually (even if it's sending each an identical e-mail, customized just with their name) than by talking to the whole group to stress the importance of deadlines.

THE VALUE OF DEBRIEFING

Harvard Business School researchers found that among a group of surgeons learning a new operating technique, those who discussed each case in detail and debriefed with team members after procedures managed to halve their operating time. Those who didn't discuss and debrief hardly improved their time at all. (Atul Gawande, "The Learning Curve," *The New Yorker,* January 28, 2002.)

Step 4: Adapt to Fit the Context

When assigning work to staffers, you should apply the three steps in the delegation cycle above, but how you apply them will vary depending on the person to whom you're delegating (the who) and the nature of the project (the what).

When it comes to the who, consider your staff members' skill and will.

Skill

You will likely learn from experience who is best at turning around a high-quality written assignment and who is a superstar at building connections with an external constituent (these are rarely the same person). Yet when you assess skill level, don't automatically assume that stellar employees need little guidance, since even the best employees have areas where they need closer management. You might have an otherwise outstanding worker who has trouble meeting deadlines, so you might ensure she creates a timeline with built-in room on the front end for unexpected delays. Or you might have someone who hates putting plans in writing but always delivers high-quality work on time. With that person, you might waive your normal expectation of a written plan and instead agree verbally on a path forward.

A subset of skill is the person's experience in your organization. You may have just hired a master fundraiser, but because the person is new to your organization, you want to work with her more closely on early projects than you would on the same projects three months from now.

Will

Considering will means assessing what people like and dislike. Your program manager's well-known hatred for doing budgets should lead you to take a more hands-on approach, because it's reasonable to think she might be inclined to put the work off or put less energy into it than into work she loves. (Of course, if she does an otherwise excellent job as a program manager, it might be reasonable to find someone else to handle those budgets, since you'll likely get better results by assigning that work to someone with more enthusiasm for numbers.)

Beyond the who, you need to consider the what—the nature of the task and how difficult and important it is.

Difficulty

Obviously the more difficult the assignment is, the more time you'll want to spend discussing it on the front end and checking in as the work progresses. And conversely, relatively easy, straightforward tasks will require less of your oversight. For instance, if you are asking your experienced advocacy coordinator to create letter-to-the-editor templates for activists to use, you might simply talk about the topics you want to cover and show her templates that have been used in the past. But if the same person has been assigned to devise and implement a plan for a new initiative to establish local chapters, you'll want to talk in depth at the outset about the goals, process, and potential pitfalls; check in regularly to give advice as the plan develops; and stay in very close contact as the implementation begins.

Importance

How important is the assignment? What are the potential ramifications of success or failure? For instance, if your organization's most important ally in the Senate is speaking at your conference, you would want to be more actively engaged in ensuring that everything goes smoothly than you would be in supervising the setup for your management team's monthly meeting. (See Figure 2.2.)

After weighing all of these factors, decide on a general approach. Should you take a highly hands-on approach, be moderately hands-on, or be fairly hands-off? If your consideration of these factors leads you to determine that a hands-on approach is called for, it can be helpful to let your employee know this. You might tell her, "I'm going to be checking in pretty closely since this is the first time you've done this and we really can't afford to have any delays in getting these out to our funders."

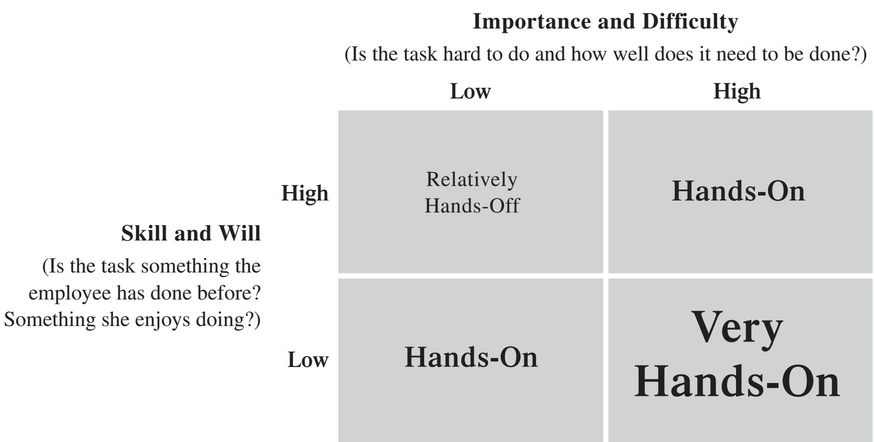

FIGURE 2.2. *Hands-On or Hands-Off? Determining Your Approach*

MANAGING SIDEWAYS What about overseeing a project or delegating work when you don't have authority over the people involved? Actually, the same principles still apply:

- Determine how hands-on you need to be based on the nature of the project and what you know about the people involved.
- Agree on clear outcomes, constraints, resources, and prioritization.
- Check in during the course of the work.
- Structure learning and even an opportunity for group accountability at the end.

If you feel awkward about managing a peer on a project, remember that the key is to be transparent about why you're taking this approach. For instance, you might explain, "There's potential for us to end up on different pages once we go off and start working on this, so why don't we check in next week and make sure our heads are still in the same place?"

We've thrown a lot at you, but after going through a couple of rounds of the delegation cycle to get the hang of it, including debriefing how the process went, much of what we have addressed here will become second nature. And once the principles of agreeing on expectations, staying engaged, and creating accountability are in place, your team will produce stronger work products with a lot more efficiency, helping you get the results you need.

KEY POINTS

- Remember the basic rule: guide more and do less.
- Guiding well means setting clear expectations, staying engaged enough to ensure that corrections are made along the way, and creating accountability and learning on the back end.
- In setting expectations, remember the five W's and an H:
  - Who should be involved?
  - What does success look like?
  - When is the project due?
  - Where might the staff member go for resources?
  - Why does this work matter?
  - And a little bit of how you should approach the work.
- A simple repeat-back of expectations from your staff member can do wonders to avoid miscommunication.

- The most common way managers fail at delegating is by not staying engaged to monitor progress. If you don't get a sense of how the work is proceeding once you've assigned it, you will almost always experience a serious implementation gap.
- When a project ends, you and your staff should reflect on results, draw lessons learned, and create accountability. You need your staff to understand that you mean what you say.
- How you apply all of these points will depend on the context. Consider the skill and will of your staffer as well as the difficulty and importance of the assignment, and adapt your approach accordingly.

Additional Reading

S. R. Covey, *The 7 Habits of Highly Effective People: Powerful Lessons in Personal Change* (New York: Free Press, 2004).

A. Gawande, "The Learning Curve," *The New Yorker*, January 28, 2002.

William Oncken Jr. and Donald Wass, "Management Time: Who's Got the Monkey?" *Harvard Business Review*, Nov.–Dec. 1999, pp. 2–7.

"Situational Leadership Theory," Wikipedia, http://en.wikipedia.org/wiki/Situational_leadership_theory and http://12manage.com/methods_blanchard_situational_leadership.html.

TOOL 2.1

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 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 project is:

   Manager: _________________ Helper:_________________

   Owner:_____________________ Approver:_______________

   Consulted:_________________
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 products or activities (for example, outlines, data, rehearsals) will you want to review or see in action to monitor progress?

   ____
   ____

Create Accountability and Learning

1. When and how will you debrief how things went? Can you schedule that now?

   ____

Adapt Your Approach

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

   Very hands-on Moderately hands-on Relatively hands-off

TOOL 2.2

SAMPLE PROJECT PLAN

Project: Host a panel on new climate change initiatives, raising our profile among groups working on environmental issues

Dates: October 20, 2011–January 15, 2012

This project will be a success if:

- We land four star speakers (major players) with a range of perspectives
- At least 80% of invitees attend, including reps from significant allies and at least three newcomer groups
- 90% are "highly satisfied" with the event
- 85% sign up to join our mailing list
- Smooth execution of all logistics (on time, all speakers briefed, enough food and drink, no technical issues)

Area of Work ("Stream")	**Steps**	**Due**	**Stakeholders (MOCHA)**	**Status/Notes**
Overall		Dec. 15	Owner = Sue! M = Dan, C = John and Rachel, H = Tina, A = Carlos	In progress
	Make the conference a smash hit	Dec. 15		Done
Panel discussion		Dec. 15	O = John (Sue = M, Carlos = H for making calls)	In progress
	Draft outline of topics we want covered in discussion	Oct. 28		Done

Think ahead of time as to who needs to be involved and in what capacity before starting the project.

Start with the deadline in mind, and work backward to determine the interim due dates.

It is often helpful at the start of large projects to list overall stages with deadlines.

Area of Work ("Stream")	Steps	Due	Stakeholders (MOCHA)	Status/Notes
	Identify potential speakers to join the panel and run by Carlos	Oct. 30		Done
	Draft e-mail invite for speakers	Nov. 3		Done
	Carlos signs off and sends e-mail	Nov. 7		
	Confirm list of speakers and arrange call with speakers	Nov. 17		Done
	Send speakers e-mail with info on other panelists, our publications, proposed outline for discussion	Nov. 20		Done
	Call with speakers	Week of Dec. 8		Thurs., Dec. 11: Carlos, Dan, Tina, me in small conference room
	Revise and send out final outline for discussion	Dec. 15		Append notes from call
	Confirm speakers' attendance; get special requests if needed	Dec. 18		
Invite		Dec. 8	O = Rachel; A = Dan	In progress
	Brainstorm session with team re: how to get the word out	Nov. 10		Done
	Draft invite	Nov. 19		Done
	Get comments from Dan on invite	Nov. 28		Done

Area of Work ("Stream")	Steps	Due	Stakeholders (MOCHA)	Status/Notes
	Revise invite based on Dan's input	Dec. 4		Done
	Finalize and send out	Dec. 8		Tina to track responses and check numbers periodically
	E-mail reminder to RSVP	Jan. 5	O = Tina	
Materials		Dec. 17	O = Sue, H = Tina, A = Dan	In progress
	Draft program and inserts	Nov. 20		See 2007 program
	Send materials to Dan	Nov. 20		Done
	Revise materials based on Dan's input	Dec. 12		
	Finalize and make copies	Dec. 17	O = Tina	Use heavy paper
Volunteer coordination			M = Dan, O = John, C= Sue and Rachel, H = Tina, A = Dan	In progress
	Confirm volunteers	Dec. 19		Need at least 4
	E-mail reminder to volunteers	Jan. 5		
Logistics			M = Sue, O = Tina, C = John and Rachel, H = Team, A = Dan	Pending

Area of Work ("Stream")	Steps	Due	Stakeholders (MOCHA)	Status/Notes
	Reserve large conference room and AV equipment	Nov. 17		Done
	Set up signs, chairs, welcome table	Jan. 8	H = volunteers	
	AV set up and testing	Jan. 9	H = tech team	
	Paper, pens, water bottles for speakers	Jan. 9		
After the event		Jan. 15	M = Dan, O = Sue, C = John and Rachel, H = Tina, A = Carlos	Pending
	Conduct debrief of event with Dan, Tina, Rachel, John, Carlos	Jan. 15		
	Send event summary to Dan and Carlos	Jan. 14		
	Volunteer thank-yous	Jan. 15		