The Management Center
Turning good intentions into great results

Delegation Worksheet
Setting Your People Up For Success

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 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 products or activities (e.g., outlines, data, rehearsals, etc.) will you want to review or see in action to monitor progress?
    ☐ Early on: ☐ Midstream: ☐ On the back end:

Create accountability and learning

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

http://www.managementcenter.org/tools/

Assigning Responsibilities

Progressive organizations often place high value on involving multiple stakeholders inside or outside the organization in its work. Such widespread involvement can generate greater buy-in and better outcomes, but it can also generate confusion about who is responsible for what. The "MOCHA" model[1] can help managers more clearly articulate who should play what role throughout the course of work and thereby generate better results.

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 only be **one** owner.

CONSULTED | Should be asked for input or needs to be bought in to the project.

HELPER | Assists with or does some 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.

Managers can use a very simple table to make clear who is assigned to what role. Note that the same individual might be assigned to more than one box:

Project: Setting agenda for annual convention

Manager	Owner	Consulted	Helper(s)	Approver
Ruth (Dep. Director)	Carlos (Dir. of Programs)	Ray (board chair), all program team members, Alex	Alex (on logistics), Dean (for input from members)	Melissa (ED)

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[1] We adapted this model from the "DARCI" model taught in some programs, which stands for: Decider, Accountable, Responsible, Consulted, Informed.