

MANAGING to Change the World

**The Nonprofit Leader's Guide to
Getting Results**

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Chapter 1

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 making edits – and soon find that you’ve rewritten the entire thing. 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, only to inevitably 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, damned if you don't."

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

EXACTLY HOW HANDS-ON SHOULD YOU BE?

Wouldn't it be nice if there were an easy answer to that question? ("Finally – now I know that I should be 58% hands-on!") While there's no one-size-fits-all formula, from our work with managers we've come to a paradoxical-sounding belief: **most managers need to be more hands-on than they are, and 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, in making sure they and their staff are on the same page about how the work will proceed, in monitoring the work while it's ongoing, and in creating accountability and learning on the back end.

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.

Given all this, if you're like many of the managers we see, we can sum up our advice to you this way: **guide more, do less.**

Guide more so you get better results, and you'll be able to do less.

Won't this take more 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 before reviewing data on progress along the way. By doing this, though, 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), and over time you'll be able to delegate bigger and bigger pieces of work and know that they'll come out successfully. And when that happens, you can focus your energies on the work that only you can do.

THE COMPONENTS OF GOOD DELEGATION

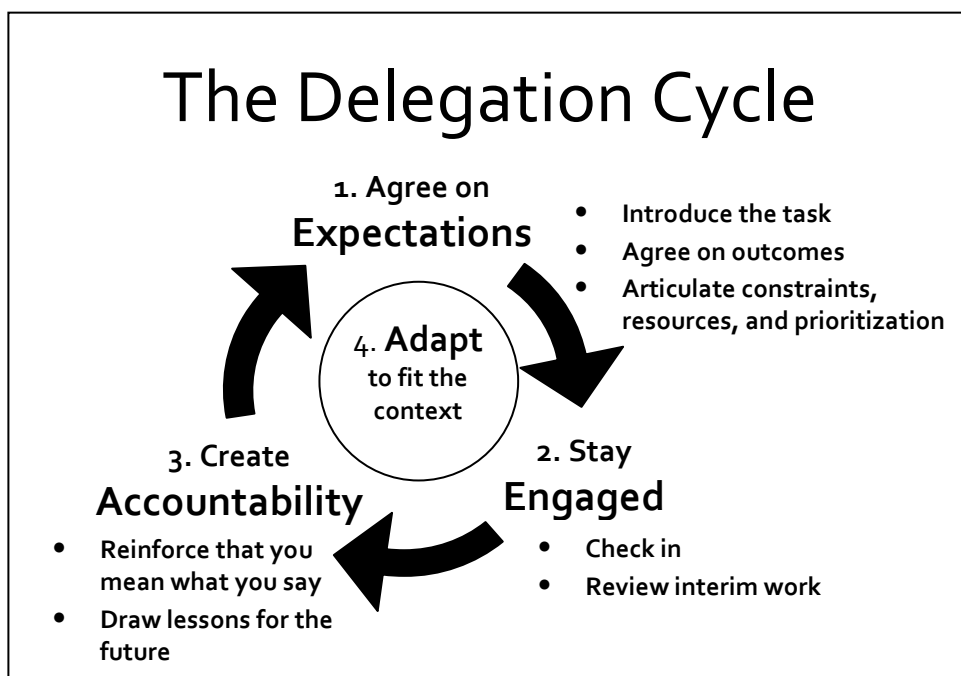
As we mentioned in the introduction to this section, there are three key steps to managing work generally, and in the delegation process more specifically:

1. Agree on Expectations. Ensure you and your staff are on the same page about 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. (If you remember things only with acronyms, you could change “accountability” to “enforcement” and think of the 3 E's.)

How exactly these principles apply depend on the context, so we'll discuss a fourth principle, which most people do intuitively: adapting your approach to fit the person and project.

The figure below summarizes the basic process:



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. Sound

straightforward? 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 won’t get you there. Rather, there are four distinct stages to this step: assigning the job; agreeing on what success looks like; articulating details like the project’s constraints, available resources, and priority level; and confirming that your staff understands the assignment and has a plan for moving forward. Let’s look at each of the stages.

Assigning the job

Assigning the job to your staffer is fundamentally about articulating what you are delegating and what role you want your staff member to play. While this sounds easy, we frequently see managers define the task more narrowly than they might. To take a very simple example, you might ask your assistant to check on whether there are enough pads and pens in the conference room for an upcoming meeting. A broader approach – one which will make the assistant’s job more challenging and your life easier – would be to tell the assistant that she is in charge of all logistics for the meeting. Similarly, it’s one thing to ask a head of development to send a thank you note to a potential donor after you have met with the donor, but another thing to delegate being in charge of all written donor communications. (Even better, as we’ll see in Chapter 2, is to delegate the broad responsibility of “Ensure we raise our budget this year.”)

However broadly you ultimately define the task, be unambiguous with your staff members that they are responsible for it at the end of the day. 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.” Your staff member still might call on you or others for help or input as appropriate, but as the “owner” (a word we love) of the responsibility, their job is to ensure a successful outcome.

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 Onken, 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.

Very commonly, "taking back the monkey" happens in response to a seemingly legitimate question. Whenever possible, 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 "Management Time: Who's Got the Monkey?" by William Onken, Jr., and Donald Wass in Harvard Business Review, November-December 1999.

Agreeing on clear outcomes

Most managers we know hate being labeled micromanagers.

Micromanagers tell staff exactly how to do a project, or worse yet, do (or re-do) the work for them. What lets you delegate effectively while not micromanaging is *setting clear expectations for success*. By being extremely clear about what success looks like, you free your staff up to figure out the best way to get there.

Establish the aim. In cases where outcomes are basically pre-determined, such as getting a bill passed that your organization has determined is a priority, you can simply state that the desired aim is bill passage by the

end of the year with certain key provisions in it. In cases where the ideal outcome is less clear, you might ask your staff to take the lead in proposing outcomes, particularly if they have some experience in the area. For instance, you might say, “You’re in charge of logistics – what do you think doing that successfully looks like?”

“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*

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 what is desired. Quantifying outcomes is not always feasible, though, so you can also agree to qualitative aims. In these cases, you should be as specific as you can about what the qualitative target is – i.e., how you will “know it when you see it.” For the staffer you put in charge of logistics, the qualitative aim of having things “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.”

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. For instance, in delegating a piece of writing, you might explain that you need the document to appeal to a particular funder, and you could give context about the things that the funder cares about and what will turn the funder off.

Samples and templates. 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 new Web site she is developing should look “clean and crisp,” you might send her links to sites that you think feel that way. Similarly, you

could give your new development director a successful grant proposal from last year to show her what 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 (e.g., organization name, mission, budget, etc.) and have her fill it in.

Articulating constraints, resources, and prioritization

Most work assignments have some constraints and resources attached, and you should articulate these, as well as making it clear how high of a priority overall the work is.

Constraints. What are the constraints on the process (e.g., who needs to sign off on an item before it goes out the door?) and the substance (e.g., items to include in the budget)? In the Web design example, you might ask your communications director to submit draft design options to the head of development before she makes a final recommendation (process constraint). You might also indicate that the organization’s logo must appear on every page (substantive constraint).

Resources. What money, people, supplies, and other tools can your staff member use? Within that list, one of the most valuable resources you can offer your staff is your own time. Make it clear that staff members can approach you to clarify expectations, answer questions, review interim progress, and help brainstorm solutions. In doing this, keep in mind the “monkey” principle (*see page 16*) and make sure that staffers maintain ownership for 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 should not say, “I’m stuck on X. What should I do?” 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 spinning their wheels to figure 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.

Process Constraints: When Projects Involve Multiple People

Because nonprofits often place a high value on inclusion, projects often end up involving lots of different people. Getting multiple perspectives can be a good thing, but too often we see it devolve into confusion when people are not clear on their roles and projects languish for lack of a clear driver or decision-maker.

In projects where multiple people are playing roles, then, part of your job is to articulate who should play what role throughout the work. Many of our clients have found it very helpful to have a standard vocabulary within the organization for how people might be involved. There are different models you can use, but one option is the “MOCHA” model. (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.)

Manager: Assigns responsibility and holds owner accountable. Makes suggestions, asks hard questions, reviews progress, serves as a resource, and intervenes if things are off-track.

Owner: Has overall responsibility for the success or failure of the project. Ensures that all the work gets done (directly or via helpers) and that others are involved appropriately.

Consulted: Should be asked for input and/or needs to be brought in.

Helper: Available to help do part of the work.

Approver: Signs off on decisions before they’re final. May be the Owner or Manager, though might also be the executive director or board chair.

We adapted this model from the “DARCI” model taught in some programs, which stands for: 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 (e.g., creating a detailed project budget) into a square hole (the artistic director who is a creative genius but a disaster with numbers). When delegating work, be sure to consider who actually 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 repeatedly 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 talk more about this and other performance issues in Chapter 8.)

Prioritization. Make sure your staff member knows where the project falls relative to her other priorities. You've likely had the experience of assigning a project, expecting it to be finished or at least well underway a week later, checking back in, and discovering 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 as well, if you truly mean it – 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 definitely be wrapped up by August.")

Agreeing on How to Move Forward

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

The repeat-back. Time and time again, we see managers who think they have been crystal clear about their expectations shocked to discover that their staff members have 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 at the beginning.

The best way to prevent “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 to repeat back to you what they’ve taken their 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 quick e-mail summarizing the assignment, including expected outcomes and next steps. This might feel awkward at first, but you can even blame your own fallible memory by saying something like, “You know how I sometimes change my mind about a project without realizing it? To make sure that doesn’t happen, 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 on the same page, so you’ll now have an opportunity to clarify.

See page 34 for a sample e-mail repeat-back.

The plan. The quick verbal summary and the five-minute e-mail are simply less formal versions of what can become a more extensive plan on more complicated projects. The level of 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, you should ask your staff member to create a written plan so that the two of you are on the same page about how she

intends to move forward. This plan will be the staff member’s tool for juggling the work’s many moving pieces, and it should include information about each step, interim deadlines, and notes on MOCHA-type stakeholders (*see sidebar on page 19*). 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 backwards, she may spot early steps (like securing a venue) which could otherwise have slipped until too late.

Project Planning: The Five S’s

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

1. **Success**. What are the desired outcomes of the project?
2. **Stakeholders**. Who else needs to be involved, and how? Use MOCHA as a tool to think through who needs to be involved in what.
3. **Stages**. Are there key dates by when certain phases of work must be complete? For instance, there might be a planning stage, a rehearsal stage, and an execution stage.
4. **Streams**. What are the main categories of work? What should be the MOCHA for each stream?
5. **Steps**. What are the specific, detailed steps that need to happen within each stream of the project?

See page 35 for a sample project plan.

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 hard 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 of the back and forth is a plan that is better than either you or your staff member might have developed on your own.

Step 2: Stay Engaged

Once there has been significant discussion about the expectations and the plan of attack, many managers assume that the actual work will be almost as a matter-of-course. They are then often surprised by the "implementation gap," where what happens in practice looks very different from what they expected. In fact, the number one 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 feel for 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 avoid any implementation gap and so that you can serve as a better resource to your staff.

The number one way managers fail at delegating is by not staying involved to check on progress.

There are three main ways to get your hands dirty and ensure your staff is making progress: checking in with staff directly, reviewing interim work, and seeing the work for yourself firsthand.

Checking in with staff directly

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

Regardless of the forum, in addition to serving as a resource 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, to discuss steps around a particularly tough issue (“How are you approaching the issue of diversity on the panels?”), and to report on RSVPs and speaker confirmations.

In formulating these questions, think critically 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. (But do this in a tone that won’t make your staffer feel you lack confidence in her.) Remember, your job as a manager is to make sure you, your team, and the organization get results. For instance, in the example of the conference, you might ask, “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 interim work

It 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. In many cases, discussing a “slice” of a project before the staff member gets too far saves tremendous energy and frustration down the road.

In addition to reviewing either partial or more complete products, managers can review reports on progress. Sometimes progress reports might be simple narrative updates from staff members, ideally covering topics that the manager and staff member have agreed upfront are most important. Managers can 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 position on a pending piece of legislation.

Seeing the work firsthand

The least common but perhaps most powerful way to see how things are really going is to directly observe the work in action. Staff members might be completely upfront 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 actually deliver an agreed-upon appeal can all offer valuable insights into how what is happening in reality compares to what has been outlined in the plan. Even taking a sample from something as simple as a stack of letters that a staff member is addressing to donors can lead to surprising insights about how a task is being completed. However you do it, seeing a sample of the work firsthand allows you to catch any disconnects before too much time goes by.

With work that’s happening in the field, seeing it firsthand is particularly important, since – unlike with, say, a report where you’ll see the final product – it’s possible to never actually see work that’s happening remotely. Since you can’t effectively manage a program without seeing what’s happening, find ways to see field work in action. If your organization runs training programs, sit in on some trainings. If you’re running a ballot initiative campaign in another state, make site visits to how things are being run on the ground. One executive director we know

One executive director was shocked by how different what was happening in the field was from what he had been assuming.

started sitting in (with permission) on randomly selected calls between his head of regional operations and the organization’s regional staff, and was shocked to discover how different what was happening in the field was from what he had been assuming.

Firsthand observation also helps you serve as a resource to your staff 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 you have the same fact base 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 example above, the executive director sat down with his head of regional operations so they could debrief the calls, acknowledge where things were off-track, and generate solutions.

Step 3: Create Accountability (and Learning)

We recently met with a manager who was incredibly frustrated. He had delegated the task of writing an important memo to one of his staff members. He set expectations appropriately and made sure the staff member understood them, and then reviewed a draft along the way to make sure it was on track. The end product produced by the staff member, though, was still missing a crucial ingredient. The manager’s reaction was

typical: “This just shows that you can’t delegate anything and expect it to get done right!”

While 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, assertive (but not hostile – see Chapter 9) way, share his reaction to it. By doing this, the manager would not only get the product he wanted, but perhaps more importantly he would also 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

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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.

Don’t Punish the Whole Class

Remember when you were in school and one student did something wrong but the teacher yelled at the whole class? We occasionally see managers make a similar mistake, 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.

In addition to reinforcing responsibilities, the accountability stage can produce lessons for the future. Even when things have gone well on a project, both you and your staffer have likely learned from the experience

and picked out things that could be done differently next time to get even better results. A write-up of these lessons – even as just a quick bulleted list – can be an invaluable resource to have on hand 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, to 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.

The Value of Debriefs

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... while those who didn't discuss and debrief hardly improved their time at all. (See Atul Gawande, "The Learning Curve," *The New Yorker*, January 28, 2002.)

Step 4: Adapt to Fit the Context

When assigning work to your 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 member's 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 (rarely the same person). Yet when assessing 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 for unexpected delays on the front end. Or you might have someone who simply hates putting plans in writing, but who 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 will still 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, 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 input and oversight from you. 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 what 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 set-up for your management team’s monthly meeting.

After weighing all these factors, you’ll want to decide on a general approach. Should you take a highly hands-on approach? Should you be moderately hands-on? Or should you be fairly hands-off? If your consideration of these factors leads you to determine that a particularly

Managing Sideways

What about overseeing a project or delegating work when you don’t have authority over the people involved? Actually, most of 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; and check in during the course of the work.

hands-on approach is called for, it can be helpful to let your employee know this upfront. 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.”

Allow yourself and your staff to work through a couple rounds of the delegation cycle to get the hang of it. 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.

See page 33 for a delegation worksheet.

Key Points

- Remember the basic rule of **guide more, do less**.
- Guiding well means setting clear expectations, staying engaged enough to ensure corrections get made along the way, and creating accountability on the back end.
- In setting expectations, you can avoid micromanagement by focusing on clear outcomes, and letting your staff member propose the best way to get there.
- 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 feel for 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.
- 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**

- Stephen R. Covey, “Delegation: Increasing P and PC” in *The 7 Habits of Highly Effective People: Powerful Lessons in Personal Change* (Free Press 2004 edition), pages 171-179.
- Atul 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, November-December 1999.
- Situational Leadership Theory, see http://en.wikipedia.org/wiki/Situational_leadership_theory and http://12manage.com/methods_blanchar_d_situational_leadership.html.

Tools

- Delegation worksheet
- Sample e-mail repeat-back
- Sample project plan

Delegation Worksheet

Setting your people up for success

I am assigning _____ the responsibility of _____.

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

Very hands-on Moderately involved Relatively hands-off

Step 1: Agree on expectations

1. What background and context does your staffer need to understand where the work is coming from and what you are trying to accomplish?

2. What would success look like? What are the ideal outcomes?

3. What are the constraints on process? What is the timeline? What samples or resources are available? How big a priority is this task relative to other work?

The MOCHA for this task is:

Manager	Owner	Consulted	Helper	Approver

4. What other input do you have?

5. 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 _____

Step 2: Stay engaged

1. With what frequency will you check in? What hard questions should you ask?

2. What specific products or activities will you want to review or see in action?

a draft or outline key data other _____

an interim piece of work rehearsals/walk-throughs _____

Step 3: Create accountability (and learning)

When and how will you debrief how things went?

Sample E-mail Repeat-back

From: Alice Lee
To: Jenny Ray
Sent: Tue Jul 29 16:05:56 2008
Subject: Newsletter production (repeat-back)

The e-mail repeat-back should be short and informal, and should not become a long, bureaucratic process.

Hi Jenny,
Here's what I took from our discussion about newsletter production:

Tasks (delegated 7/29/08)

1. Printing

- Look into printing options (several hundred copies, depending on cost)
- AL, JR to touch base on or before August 1 about results of initial search

2. Layout

- Look for people/companies who can do the layout (one possible lead: freelancer used by West Africa team to produce their Liberia report)
- Remember to make the newsletter usable—include samples?
- Touch base on this early and often

3. Editing

- As early as September 1, begin super-micro edit/proofreading of all articles

When your staff knows they'll need to do a repeat-back, they'll be far more likely to take notes and therefore to remember what you said.

4. Online Strategy

- Which parts should we put online – all? Articles only? Are there other options?
- Goal: Want a way to track not just how many, but who is reading the newsletter
- Come up with a few good options on this

Context:

Our reports contain useful information and right now we have no systematic way to share them beyond our contacts. Other orgs use newsletters successfully, both online & printed.

Budget:

Rough at this point – could cost \$10,000 but shouldn't cost \$40,000. ER will find out what was originally set aside in annual budget.

The final product should be:

Impressive, useful (including easy to use), and, ideally, viral

Timeline: TBD (ideally by Oct. 1)

Sample Project Plan					
Training for 2008 Fellows					
Stream	Steps	End product/ deliverable	Due Date	Stakeholder notes (MOCHA) ¹	Status/ notes
Overall	<i>Produce and deliver top-notch training</i>	Great trng! Avg. participant satisfaction of at least 9.2 (of 10)	Jan. 15	M = Dan, O = Sue C = John, Rachel, H = Teresa, A = Dan	In Process
	Make decision on whether to conduct training		Oct. 21		Done
	Dft presentation to John		Dec. 1		
	Final presentation to John		Dec. 15		
	Conduct training		Jan. 9		
	Evaluate training and do necessary follow-up		Jan. 15		
Research/ dev.					Done
	Review materials from last year's training		Oct. 15		Done
	Do additional research as needed		Oct. 22		Done

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

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

It is often helpful on larger projects to list key overall stages with deadlines upfront.

¹ Manager, Owner, Consulted, Helper, Approver

SECTION I – MANAGING THE WORK

	Make decision on whether to conduct training	Confirmation e-mail to JR	Oct. 23	Nina should also be C	Done
	Send background materials on training	Monkey article and chapter on managing up	Oct. 23	Teresa is O	Done
Content			Oct. 24		In Process
	Meeting to discuss content and next steps, including delegating specific pieces	Delegation worksheet on training	Oct. 28		
	Develop content for training: outline	Outline	Oct. 30		Pending (add mats from TL's group)
	Develop content for training: PowerPoint	Draft ppt. deck	Nov. 12		
	Develop worksheets and handouts	Revised outline and ppt. deck	Nov. 14		(See '07 training wkst)
	Send materials to DS		Nov. 17		Pending (key question re: audience)
	Get comments from DS		Nov. 21		
	Revise materials based on DS input		Nov. 26		Pending

	Finalize presentation and send to JR	Final deck and handouts	Dec. 15		Pending
Logistics/ execution			Jan. 15	Teresa = O for all logistics, Sue = M	Pending
	Set up call with JR to finalize logistics		Dec. 20		Pending
	Practice giving training to staff	Full run-through	Jan. 7		Pending
	Print out final materials		Jan. 8		Pending
	Save presentation on disk and bring to session		Jan. 8		Pending
	Set up debrief session		Jan. 5		Pending
	Conduct debrief of training w/ JR, DS, & RJ		Jan. 15		Pending

About The Management Center

The Management Center's mission is to make it easier for progressive nonprofit organizations to get great results. We do this by developing leaders' management skills through one-on-one coaching and, beginning in 2009, small group trainings. We ground our work in two core beliefs: that management is not an end in itself, but rather a tool to help people trying to do good do so more effectively; and that good management stems from a set of relatively straightforward and learnable practices that lead to great results when they become habits.

Founded in 2006 as a nonprofit private operating foundation, as of January 2009 The Management Center has worked with over thirty organizations. For more information, visit The Management Center's Web site at www.managementcenter.org.

If you like this book and are interested in additional copies or would like to learn more about our trainings, please email us at info@managementcenter.org.