

Y'S
MEN
INTERNATIONAL



Workshop on Delegation

Trainer's Manual



Instructions for the use of the
DELEGATION TRAINER'S MANUAL

This material is intended for use in providing training to Club, District, Regional and Area Officers. When the words “Region” or “Regional” are used, the trainer should change to “Club,” “District” or “Area,” whichever is appropriate for the training workshop.

Instructions to the trainer are in **bold** type and bracketed in parentheses (). All other words represent what the trainer should *say*.

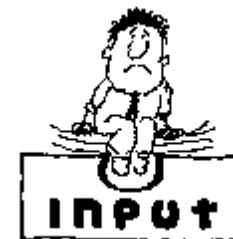
The trainer should change the spoken words so that they fit his/her “conversational” method of speaking. Everyone says things differently so the trainer should change the words to allow himself/herself to feel natural.

The actual amount of training time is dependent upon the number and types of people involved in the training session. The trainer can control the time to some degree by allowing more or less time for group participation in the discussions.

Above all, the trainer should read the material a number of times to ensure familiarity during the presentation. The less “reading” the trainer does, the better the training.

Supplies—the following list includes equipment and materials the trainer should have. If anything is *not* going to be provided by the “host” organisation, the trainer should bring it with him/her.

- flip chart (large pad of paper, preferably on an easel or stand)
- coloured marking pens (different colours will provide variety and help keep interest)
- masking tape (the flip chart paper will be fastened to the wall to allow viewing during the training session)



YOUR INPUT REQUESTED

If you have any suggestions on the content of this manual—or ideas for additional sections—please contact IHQ or send an email to ...

ihq@ysmen.org



We are grateful to Alan Wallington of the Kingswood Y's Men's Club, England, for his help in preparing this manual for electronic distribution.

WHY LEADERS SHOULD DELEGATE

WHY LEADERS SHOULD NOT DELEGATE

THE SIX STEPS OF DELEGATION

Figure 4

THE SIX STEPS OF DELEGATION

Selecting the job

Selecting the person

Preparing & Motivating

Turning over the work

Encouraging Independence

Maintaining Control

Figure 5

ROUTINE	INNOVATIVE

Figure 6

DELEGATION

One of the long-standing definitions of management is: “Managing consists of planning, organising, directing (or coordinating) and controlling.” **(Trainer: Have flip chart paper as in Figure 1.)** These, of course, are not the only duties of a manager; some others are team building, scheduling, rewarding, motivating, selecting/hiring, to name a few.

All of these (and many others that you might mention) are important, each being *the* most important at certain times. But let’s stay with the four functions in that old definition.

Nothing can be done *well* without proper planning at the beginning. You *must* be organised if you want to get more done in less time. You must *clearly* direct those people that are to do all or parts of the work. And you must have *some* type of control so that you know the work is getting done.

Something that crosses all of these is “delegating.” **(Trainer: Have flip chart paper as in Figure 2.)** To make sure we’re all beginning at the same place, tell me what *you* mean when you say you’re “delegating to that person.”

(Trainer: Get about five comments from the people. It’s not necessary to write these comments on the flip chart paper. We’re just trying to get the people involved in discussion.)

“Delegate” is defined in the dictionary as “to commit powers or functions to another as agent or deputy.” **(Trainer: Have flip chart paper as in Figure 3.)** When you delegate something to somebody, you are appointing that person as your personal representative—to act as *you*.

Whatever that person does is the same as *you* doing it. If the person does an excellent job, much of the credit goes to you. If the person does a poor job or nothing at all, *you* have failed. *Your* reputation is dependent upon your delegate!

For the next couple of hours, we’ll talk about: **(Trainer: Have flip chart paper as in Figure 4.)**

- why leaders need to delegate;
- why leaders do *not* delegate;
- the six steps of delegation;
- and we’ll do a few exercises.

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So, first of all, why *do* leaders need to delegate? In your office in Y’sdom, do you delegate? Why?

(Trainer: As the people give reasons for leaders to delegate, write them on the flip chart paper. Tape the paper on the wall where it can be seen during the rest of the training session.)

So, basically, we delegate for two reasons: 1) we need help if we’re going to do jobs properly; and 2) we need to provide opportunities for leadership growth for our future leaders. Of these two, providing opportunities for leadership growth is perhaps the more important.



Everyone has worked with or known someone who does not delegate—a person who tries to do all the work him/herself. Sometimes this works out fine, but not very often.

And when it does *not* work, that person usually says something like “There’s just too much work,” or “You can’t expect one person to do all of this,” not realising that the fault does not lie with the work but with the worker!



Why do you think some people act this way? Why do some people *refuse* to delegate part of the work—or maybe not even *think* about delegating?

(Trainer: List reasons on the flip chart. Following are some that might be mentioned. If they are not, you should write them on the chart for future discussion. After everybody has their reasons listed, tape the paper on the wall for further discussion later.)

- Those serving under us won’t be able to handle the assignment;
- We fear competition from those under us;
- We are afraid of losing credit and recognition;
- We are afraid our weaknesses may be exposed;
- We believe we won’t have the time to turn over the work and provide the necessary training.



Do you think these are valid reasons for *not* delegating? Can you think of situations when we would be hesitant or fearful about delegating tasks? Have you ever been in a position where somebody did not delegate because he/she thought that the delegate would not be able to do the job? Or that the delegate might be “competition” for promotion? Let’s pair off and take five minutes to identify a situation where one of these things existed.

(Trainer: Have the people divide into groups of two persons. Allow each group to develop its own situation. At the end of five minutes, pick pairs to share their situations for discussion. Ask “How did you feel about the situation?” “Did your discussion follow-up provide insight for wishing delegation had been done earlier or better?”)

Let’s move on to our third major topic: the six steps of delegating. The first step is to

SELECT THE JOB TO BE DELEGATED.

(Trainer: Have flip chart paper as shown in figure 5. Tape it on the wall.)

Before you can delegate, you need to identify just what it is that you want done. Basically, we have two types of jobs: 1) routine, repetitive; and 2) innovative, creative. Both types are very important, but often require different types of people. Actually, there are *no* jobs that are totally routine or totally innovative; all jobs have some of both characteristics. But one characteristic usually dominates.

For example, the job of Regional Treasurer is one that has existed for as long as your Region has existed. Most procedures, forms and tasks are well defined. Records of past performance are available to some degree.

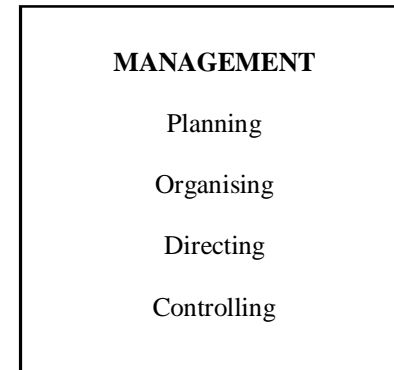


Figure 1

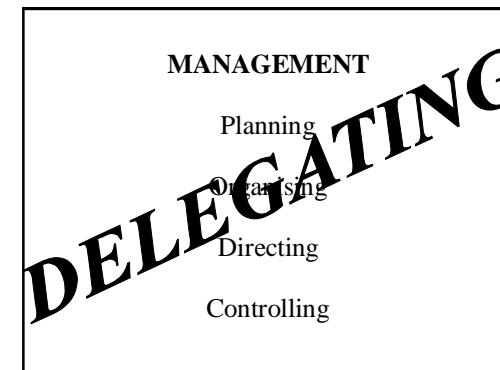


Figure 2

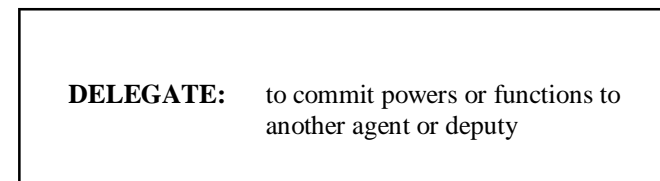


Figure 3

- Time period (e.g., month of May);
- Number and types of Club Officers;
- Possible locations;
- Topics or agenda;
- Amount of money available to be spent;
- Degree of participation by the RD.

After the teams have discussed their requirements for about 15 minutes, ask two of them to read their lists out loud—and write them on the flip chart paper. Then ask the other teams whether they have anything to add—and write any additions on the flip chart. When there are no more additions, ask if there are any disagreements. Ask whether anyone thinks that *too much* information has been provided by the RD—does all of this information take too much *away* from the freedom and innovation of the RSD?

Select two people from the group to take the parts of RD and RSD. These two people should act out the situation in which the “RD” is asking the “RSD” to accept responsibility for planning and conducting the training workshop—*delegating* this responsibility to the “RSD.” When they are done with their discussion, ask the remainder of the people to make a critique of the method in which the “RD” delegated the job to the “RSD.”)

The fifth step in the process, to

ENCOURAGE INDEPENDENCE,

becomes commonplace to you as time passes. Although you’ve advised the delegate that you are available for support and advice as required, you must try to step back and allow him/her to grow into the job by doing it and experiencing success. An important point to remember is that the delegate won’t do the job the same way that you would do it. And, very possibly, the

delegate won’t do the job as *well* as you would do it. You *must* be prepared to accept differences in both the method and the quality of the delegate’s work. But, certainly, there’s also the possibility that the delegate’s work will be *better* than yours. And that will make you a *very* good leader and manager!

The sixth step in the art of delegating is to

MAINTAIN CONTROL.

Here is where those “mid-points” that you and the delegate defined earlier will be of great help. You don’t have to wait until the end of the year or the end of the project to find out how the delegate is doing. You either ask for a report or you talk to the delegate at the time of each of those mid-points. If the delegate is doing an adequate job, you will know by the accomplishment of each of those mid-points. If the mid-points have *not* been reached, you’ll know early enough so that help can be provided.

As a team leader at the Club, Region, Area or other level of our organisation, you are still responsible for what happens. If difficulty is evidenced in the assigned role, you must step in and assist where appropriate. Remember, effective delegation aids progress, builds morale and inspires initiative.

* * * *

As we close this session on delegating, let this quote from Andrew Carnegie serve as a model for you:

“The great manager is the man who knows how to surround himself with men much abler than himself.”

(Of course, with some leaders, that’s easy to do!)

But there is *always* a way to do things better. A very innovative person can find improvements, ways to get things done better and faster. If last year’s RT did a good job, however, the next year’s RT can probably do exactly the same things and everyone will be satisfied.

But suppose, as Regional Director, you want your Region to do more with the Alexander Scholarship Fund programme than just raise



money. You want your Region to actively seek and encourage young people to undertake careers as YMCA staff members. This is new! How will your delegate get out the publicity to prospective young people? How will your delegate convince these people that YMCA work can be a rewarding career? Here we have a great need for creativity and innovation. And you need a person as ASF Regional Service Director who can come up with these new ideas—because there is no history or past records for him/her to follow.

Let’s identify some routine and innovative jobs. In your Clubs or Districts or Regions, what jobs are routine and what jobs are innovative?

(Trainer: Have flip chart paper as in Figure 6. As the people name the jobs, write them in the proper column. Tape the paper on the wall.)

But let’s go back to the job of Regional Treasurer. The first question might be: do you have a formal job description? Are the previous RT records and books available?

Perhaps you and the former Treasurer have taken the time to write down procedures and duties as conducted by the former RT. Maybe, as the RD Elect for a year, you have had plenty of time to look over the formal job descriptions of all Regional Officers. After attending Regional Board meetings for the past year (and maybe some from previous years when you were District Governor or held other Regional positions), you know what the Treasurer has done in the past. So, by whatever method, you now have a good description of just what the job is that you’re trying to delegate.

The second step in the process of delegation is to

SELECT THE PROPER PERSON FOR THE JOB.

Remember, we talked about two types of job—routine and innovative. One of the main foundations of personnel policy in every type of business is “match the person with the job.” For an innovative job you need an innovative person—one who can come up with new ideas (not all of which will be good, of course). For more routine jobs creativity isn’t as much of a requirement, but new ideas and new ways of doing old things are certainly desirable.



Now let’s assume that you are either going to appoint the Regional Treasurer or you are on the nominating committee. How would you identify the right person for this job?

(Trainer: As the people state their ideas, write them on the flip chart. Some ideas might be:

- people who have been Club or District Treasurers;
- a second term for last year's treasurer;
- people who have held other positions [DGs, RSDs, etc.];
- an accountant in one of the Clubs;
- a person who has been treasurer of another organisation;
- an enthusiastic, dedicated Y's Man who can learn the job.)

Now we have identified both the job and a person we think is qualified and can do a good job.

The third step in our process is to

PREPARE AND MOTIVATE THE DELEGATE.



I want you to pair off with the same person as before—and think of a time when somebody came to you and asked you to do a

job. Not just any person or any job—but someone who came and talked to you for a while, and you accepted the job with enthusiasm and really wanted to do a good job. You were excited and looked forward to the job and to working with the person who asked you. Each person in the pair should tell the other person about that time—and then the two of you should discuss it. The two of you together should then make a list of five things about those two situations—things that were important to your excitement, enthusiasm and desire to “get on with the job.”

(Trainer: The amount of time required for this exercise can vary widely. You will have to circulate among the pairs, watching to see when most of them have finished. You won't be able to wait for all of them to finish since that would leave the majority sitting there doing nothing but getting bored. When most have completed their lists, go around the room asking each pair to name one of the things on their list—and write them on the flip chart as they are named. Each pair should add something new to the list, not repeat what someone has already named. If everything on a pair's list is already on the board, they should say “Pass.” When everybody “passes,” your flip chart is complete. Then ask if anyone has a question about anything on the

A major point in all this is that the prospective delegate must be approached in a most positive manner if we want that person to accept. What can we say or how can we phrase our request to make the person feel wanted and important? What are the first two or three sentences that you might say?



(Trainer: Have a few people give their examples of the first few sentences that they would say when trying to convince somebody to accept the job as Regional

Treasurer. Don't write them on the flip chart, but ask the other people to comment.)

When the commitment is accepted, the next or fourth step is to

GO OVER THE WORK

and make sure that it is fully understood. This means identifying just what is to be done, when it is supposed to be completed and what is the final product. This delegate is going to be a “production” person for you. The delegate is going to “produce” a product or a service—and, to do this, must fully understand exactly what that product or service is. Here, of course, is where the formal job description would come in very handy.

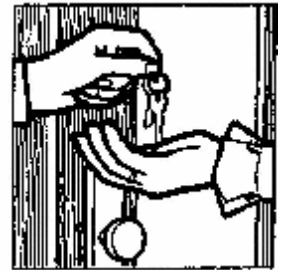
If the job is going to be a lengthy one (such as Regional Treasurer for your entire term as Regional Director—or chairperson of a large project), you will need to identify “mid-points” in the total job. In other words, break the total job into smaller parts. For each of these parts, you and the delegate should establish a schedule for accomplishment—so that both of you know when each of those smaller parts should be completed.

You may find this is the toughest and most time-consuming part of delegating. Now is the time to be patient and nurturing in your approach. Time spent now will pay off well in the long term.

With your knowledge of the task and the accompanying assistance of the former job holder, begin to provide the delegate with the procedures and tasks of the new role. Go over the records and discuss them. Bear in mind that these procedures may be somewhat foreign and could require periodic clarification. Patience, once again, is a key issue here. The approach of “patience and piecemeal” until the task is

second nature to the delegate will aid him/her in assuming those newly-acquired responsibilities.

Once you are convinced that the delegate can take on the role comfortably, step back and let him/her fly! Be sure to keep the two-way channels of communication open in case there are questions or concerns. However, as the delegate's level of confidence increases, make it evident that you trust him/her and feel sure that he/she can handle the task without frequent monitoring.



Let's take a little more time on this “going over the work and making sure it's understood.” Here's a situation. You have accepted the position of Regional Service Director for Leadership Training. The major duty in your new job, as explained by the Regional Director, is to plan and conduct the Regional training workshop for Club Officers. What do you need from the RD in order to do this job?

(Trainer: Have the group pair off in teams of two people. Each pair is to discuss the situation and come up with a list of bits of information, authority, etc. that is required from the RD so that the training workshop will be a success. Some might be:

