A Workshop on

Delegating in Order to Find and Protect Instructional Leadership Time

Delegation for School Leadership

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Notes Page: Why is Delegation Important?
### Worksheet: The Big Rocks

**Directions:** Jot down some notes in the chart below as the facilitator tells the story of the Big Rocks.

<table>
<thead>
<tr>
<th>Questions</th>
<th>Thoughts</th>
</tr>
</thead>
<tbody>
<tr>
<td>What are the big rocks for principals? For SAMs?</td>
<td></td>
</tr>
<tr>
<td>What are your expectations for using time well?</td>
<td></td>
</tr>
<tr>
<td>What sort of planning system will you use to make sure the principal gets to all his/her big rocks?</td>
<td></td>
</tr>
<tr>
<td>What could/should the principal delegate to you?</td>
<td></td>
</tr>
<tr>
<td>What could/should you delegate to others?</td>
<td></td>
</tr>
</tbody>
</table>

Delegation Pyramid

- Principal *must* do
- Principal *should* do, but someone else could do part of it
- Principal *could* do, but others could do it if given the opportunity
- Others *should* do, but principal can help in an emergency
- Others *must* do
## Information: What to Delegate

| Principal *must do* | ➢ Personnel issues  
➢ Teacher evaluation  
➢ Strategic decision making  
➢ Student behavior management: suspension or expulsion |
|---------------------|-------------------------------------------------|
| Principal *should do, but someone else could do part of it* | ➢ Reports, special requests (if skill level is there)  
➢ Budgeting  
➢ Projects with a short turnaround time |
| Principal *could do but others could do it if given the opportunity* | ➢ Representing school at meetings  
➢ Facilitating part of a faculty meeting  
➢ Functions principal dislikes (try to find someone who likes them)—this is not the same as giving people the “dirty work” |
| Others *should do, but principal can help in an emergency* | ➢ Routine decision making  
➢ Tasks that others are more qualified for than principal is  
➢ Routine student behavior management  
➢ Student supervision, non instructional areas of the school*  
➢ Student discipline, behavior management*  
➢ Supervision of non-teaching school staff*  
➢ School facilities: maintenance, scheduling, cleaning*  
➢ Interaction with parents on non-instructional matters* |
| Others *must do* | ➢ Assignments that add variety to routine work  
➢ Tasks that will increase the number of people who can perform critical assignments |

* Should have a designated *first responder* (other than the principal) for these tasks.
First Responder Self Assessment

**Directions:** Look at the five time-intensive management tasks listed in the left column, below. In the shaded columns, indicate how often the principal personally performs each task. In the far right column, indicate the designated first responder, if there is one.

Next, add up your scores and look at the key below the chart. What opportunities do you have to reduce the amount of time the principal spends on these tasks?

<table>
<thead>
<tr>
<th>Task</th>
<th>How often is the principal the first responder?</th>
<th>Name of the Designated First Responder</th>
</tr>
</thead>
<tbody>
<tr>
<td>Student supervision, non-instructional areas of the school</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Student discipline, behavior management</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Supervision of non-teaching school staff</td>
<td></td>
<td></td>
</tr>
<tr>
<td>School facilities: maintenance, scheduling, cleaning</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Interaction with parents on non-instructional matters</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Total points = ______________

13-15 points  Best! You are right where you need to be as SAM/Principal team.
9-12 points   Good! You are making progress.
0-8 points    Oh no! Rethink who is the first responder for these time-intensive management tasks.
### Exercise: What to Delegate

<table>
<thead>
<tr>
<th>Who Should Do It?</th>
<th>Examples</th>
<th>Who Decides?</th>
</tr>
</thead>
<tbody>
<tr>
<td>Principal <em>must</em> do</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Principal <em>should</em> do, but someone else could do part of it</td>
<td></td>
<td></td>
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<td></td>
<td></td>
</tr>
<tr>
<td>Others <em>must</em> do</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Information: Five Steps to Successful Delegation

**Step One: Planning**

1. Analyze tasks and identify one that would provide the principal with more time for instructional leadership. It is also helpful to consider whether completing the task will benefit the employee to whom it is delegated.
2. Determine goal(s).
3. Visualize results.
4. Consider needs (materials, policies, coaching, resources, etc.)
5. Determine time frame.
6. Choose the right person. Know workers’ skills and capacities; tap each one’s special creativity. Consider rotating tasks to keep staff motivated. Don’t always give one person the “hard’ stuff.
7. Decide if any others need to be involved.
8. Decide how to gain commitment.
9. Solicit input from faculty and staff by asking, “How can we manage this?”

**Step Two: Engaging**

11. Gain commitment.
12. Communicate the goal(s).
13. Communicate the expected results.
14. Give pertinent information, such as deadlines.
15. As needed, teach the person how to perform the task. Include explanation, demonstration, and “teach back,” as needed.
16. Ask for a plan of action.
17. Check for understanding and provide a chance for person to ask questions.
18. Arrange for a meeting to see how it is going.

**Step Three: Collaborating**

19. Review the goal and expected result.
20. Discuss the plan and ways to overcome any possible obstacles.
22. Discuss how/when monitoring will be done.
23. Schedule coaching sessions, if needed.
24. Establish milestone meetings.
**Step Four: Supporting**

25. Allow the employee the freedom to practice and get up to speed.
26. Check progress. Follow up in a positive manner.
27. Evaluate the need for coaching or other support.
28. Discuss obstacles and solutions.
29. Offer encouragement and support.
30. Create a relaxed and efficient environment. People make mistakes and produce less when supervision is too close and constant or too distant.
31. Be realistic and respectful of time involved.

**Step Five: Appreciating**

32. Show genuine interest in the results.
33. Give people every opportunity to do a good job and when they do, follow up with compliments.
   Give credit when credit is due.
34. Do not accept unfinished, inaccurate, or substandard work.
35. Accept your own accountability for unsatisfactory results.
36. Review the delegation process to see what could have been done better. Welcome suggestions and complaints.
Exercise: Five Steps to Successful Delegation

Directions: The principal is working on spending less time on bus and cafeteria supervision. The principal has decided to delegate this to various other staff. With your partner, discuss what your role would be in completing each of the delegation steps listed below.

- Planning
- Engaging
- Collaborating
- Supporting
- Appreciating

Use the information on the previous two pages as a guide and a checklist.
Worksheet: Delegation Self Assessment

How does your school and your principal/SAM team rate in delegation? Use this brief self assessment. It may be completed by the principal, the SAM, and others in the school. Comparing and discussing results may produce rich conversations about ways to improve delegation in your school.

Rate each item on a 1-5 scale:

<table>
<thead>
<tr>
<th>Items</th>
<th>Never</th>
<th>1</th>
<th>2</th>
<th>3</th>
<th>4</th>
<th>5</th>
</tr>
</thead>
<tbody>
<tr>
<td>The principal and SAM are very clear about the SAM’s role in performing various tasks.</td>
<td></td>
<td>1</td>
<td>2</td>
<td>3</td>
<td>4</td>
<td>5</td>
</tr>
<tr>
<td>The principal and SAM are very clear about the SAM’s role in delegating tasks to others.</td>
<td></td>
<td>1</td>
<td>2</td>
<td>3</td>
<td>4</td>
<td>5</td>
</tr>
<tr>
<td>The school faculty and staff understand the SAM’s role in various tasks, including delegation.</td>
<td></td>
<td>1</td>
<td>2</td>
<td>3</td>
<td>4</td>
<td>5</td>
</tr>
<tr>
<td>The principal and SAM work collaboratively on goal setting, problem solving, and productivity improvement activities.</td>
<td></td>
<td>1</td>
<td>2</td>
<td>3</td>
<td>4</td>
<td>5</td>
</tr>
<tr>
<td>When the principal delegates work to the SAM, the SAM gets all the details needed to perform the task.</td>
<td></td>
<td>1</td>
<td>2</td>
<td>3</td>
<td>4</td>
<td>5</td>
</tr>
<tr>
<td>When work is delegated to others, they are briefed fully on the details.</td>
<td></td>
<td>1</td>
<td>2</td>
<td>3</td>
<td>4</td>
<td>5</td>
</tr>
<tr>
<td>At our school, we use delegation as one way to help people develop their skills.</td>
<td></td>
<td>1</td>
<td>2</td>
<td>3</td>
<td>4</td>
<td>5</td>
</tr>
<tr>
<td>Once a task is delegated, it stays delegated. (The principal does not step back in to do it himself/herself.)</td>
<td></td>
<td>1</td>
<td>2</td>
<td>3</td>
<td>4</td>
<td>5</td>
</tr>
<tr>
<td>When delegating work, we balance authority with need and experience.</td>
<td></td>
<td>1</td>
<td>2</td>
<td>3</td>
<td>4</td>
<td>5</td>
</tr>
<tr>
<td>We hold employees responsible for results.</td>
<td></td>
<td>1</td>
<td>2</td>
<td>3</td>
<td>4</td>
<td>5</td>
</tr>
<tr>
<td>We recognize and reward those who do a good job.</td>
<td></td>
<td>1</td>
<td>2</td>
<td>3</td>
<td>4</td>
<td>5</td>
</tr>
</tbody>
</table>