# **You Make the Difference Initiative**

Effective Delegation: System and Planning Sheet

Delegation System Reminder:

* Goal: Unleash the full potential of your volunteers by delegating based on proficiency and trust.
* Problem: Poor delegation burns people out and limits growth. Fear of mistakes causes leaders to hold too tightly.
* Solution: Use a simple system based on proficiency and authority levels.

Delegation Levels:

* Ask and Recommend: Volunteer asks before acting and recommends a course of action.
* Act and Report Immediately: Volunteer acts but must immediately report back.
* Act and Report Periodically: Volunteer acts independently and reports at regular intervals.
* Act on Own: Volunteer acts fully independently — no reporting required unless necessary

Proficiency Categories:

* Low Proficiency: Ask and Recommend.
* Some Proficiency: Act and Report Immediately.
* Good Proficiency: Act and Report Periodically.
* Excellent Proficiency: Act on Own.

Key Reminders:

* Delegate based on what they can already do well, not what you hope they’ll figure out.
* Review proficiency and delegation levels every 90 days.
* Move people up as they grow — or back if extra support is needed.
* Always aim for greater freedom for the volunteer while maintaining needed clarity for the organization.

Effective Delegation Planning Sheet

Volunteer Name: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Tasks to Delegate:

1. Task: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_  
   * Current Proficiency (Low / Some / Good / Excellent): \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_
   * Delegation Level (Ask and Recommend / Act and Report Immediately / Act and Report Periodically / Act on Own): \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_
   * Notes: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_
2. Task: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_  
   * Current Proficiency (Low / Some / Good / Excellent): \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_
   * Delegation Level (Ask and Recommend / Act and Report Immediately / Act and Report Periodically / Act on Own): \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_
   * Notes: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_
3. Task: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_  
   * Current Proficiency (Low / Some / Good / Excellent): \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_
   * Delegation Level (Ask and Recommend / Act and Report Immediately / Act and Report Periodically / Act on Own): \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_
   * Notes: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Next Review Date: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Leader Notes: