

Figure 6.1: Delegation tool

DELEGATION TOOL		
Date:	Preceptee:	
Situation to be delegated		
Objective(s) <ul style="list-style-type: none"> • What do you want preceptee to do? 		
Critical steps to be used <ul style="list-style-type: none"> • What steps are necessary to complete the task or assignment? • When? 		
Background information <ul style="list-style-type: none"> • Facts known • Information needed • Concerns • Possible causes or reason(s) for the situation • Previous discussions • Consequences if the situation continues • Other 		
Alternatives <ul style="list-style-type: none"> • Possible actions • Possible solutions • Resources available • Constraints • Other 		
Summary notes		
Specific actions	Person responsible	By when
Follow-up <ul style="list-style-type: none"> • Date, time, place • Other 		

Figure 6.1: Delegation tool, cont'd

Review	
To what extent did you meet your objectives?	
What did you handle most effectively?	
What could you have used more effectively?	
What will you do differently next time?	
Delegation Worksheet	
Task Or Assignment	Possible Strategies
1. Describe the task or assignment <ul style="list-style-type: none"> • Be specific • Focus on facts, actions, issues • Avoid interfering with preceptee • Maintain or enhance self-esteem 	
2. Ask for obstacles for completing the task or assignment <ul style="list-style-type: none"> • Use open-ended questions • Listen attentively • Maintain or enhance self-esteem 	
3. Respond as needed <ul style="list-style-type: none"> • Stress that the task/ assignment must be completed • Address mutual benefits • Listen and respond with empathy • Maintain or enhance self-esteem 	
4. Discuss possible solutions <ul style="list-style-type: none"> • Use person's ideas, when appropriate • Listen and respond with empathy • Maintain or enhance self-esteem 	
5. Agree on specific action and follow-up <ul style="list-style-type: none"> • State who, what, when • Check for understanding • Listen and respond with empathy • Maintain or enhance self-esteem 	
6. Express appreciation for the person's willingness to handle the situation <ul style="list-style-type: none"> • Be sincere • End on a positive note • Maintain or enhance self-esteem 	