

# Delegation Planner

A practical tool for nonprofit leaders

Many nonprofit leaders don't struggle with delegation because they don't trust their teams. They struggle because delegation often feels risky, unclear, or like more work up front.

Over time, leaders begin carrying responsibilities that were never meant to live with them long-term. This planner is designed to help you slow that process down, clarify what truly needs to stay with you, and intentionally transfer ownership in a way that strengthens both people and systems.

## How to use the Delegation Planner:

Use this planner when:

- You feel overloaded but can't quite name why
- You're the default problem-solver for too many things
- Work keeps routing back to you, even after you delegate
- You want to build leadership capacity without creating risk

This is not about offloading tasks. It's about transferring ownership thoughtfully.

## Step 1: Identify the Work

List the responsibilities, decisions, or tasks currently sitting with you that could potentially be delegated.

- Ongoing operational tasks
- Decision-making authority
- Project leadership
- Relationship management
- Specialized or technical work
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## Step 2: Clarify What Must Stay With You

Not everything should be delegated—and that's okay.

For each item you listed, ask:

- Does this require my role, authority, or accountability?
- Would delegating this create unnecessary risk right now?
- Is this something only I can do—or just something I've always done?

### **Step 3: Define the Right Level of Delegation**

Delegation is not all-or-nothing. Decide what level of ownership makes sense.

- I retain decision authority; others execute
- Shared decision-making
- Full ownership with defined check-ins
- Temporary delegation for development or coverage

### **Step 4: Set Clear Expectations**

Before transferring responsibility, make the expectations explicit.

- What does success look like?
- What decisions can be made independently?
- What decisions require consultation?
- How often will we check in—and how?

### **Step 5: Name the Support Needed**

Delegation without support sets people up to fail.

- What training or context is needed?
- What resources or tools are required?
- What authority needs to be clearly communicated to others?

### **Step 6: Establish Feedback and Accountability**

Delegation is a process, not a handoff.

- How will progress be reviewed?
- How will feedback be shared?
- What would prompt recalibration?

## **Final reflection**

If work only moves when it routes through you, delegation hasn't really happened—it's just been delayed.

Strong organizations don't depend on one person carrying everything. They build clarity, capability, and trust so responsibility can live where it belongs.

