

Decide what to delegate.

Decide who to delegate to.

Interview to assess willingness.

Addition responsibility needed.

Additional authority needed.

Provide resource.

Additional training and experience needed (dates).

Decide target date for full acceptance.

Set standards.

Review job descriptions.

Monitor progress (stewardship interviews).

Give support and recognition.

Name:
 Task Delegated:
 Target date for Completion:

Peter Harding.
 Completion of monthly financial report
 5th October.

Sub - Tasks	Additional authority needed	Plan for additional Training / Experience	Others to be notified	Date	Action
1. Review last 3 financial reports to establish format / style etc.	Password needed to access / use reports. ER to contact IT for password – needs approval from Finance Director	Discuss previous reports with ER – Q&A session.	Finance Director IT	By June 30th	ER PH
2. Collect data from finance staff in all departments .		PH to meet all staff in person.	Finance staff in all departments.	By 2 nd of each month	ER PH
3. Enter data into spreadsheet .		One to one training on data categories / structure of spreadsheet.	IT training staff TJ Trained by end of June	On 3 rd of each month	PH TJ
4. Run automatic reports		One to one training on reports – software capabilities.	IT training staff TJ Trained by end of June	On 3 rd of each month	PH TJ
5. Write conclusions / recommendations and complete cohesive report.	Seek approval for final report from ER prior to submission to board.	Coaching by ER around style / conclusions / political awareness as needed.		By 5 th of each month	PH ER
Review dates	June 31 st July 5 th	July 20 th August 5 th	September 5 th		

Name:

Task Delegated:

Target date for Completion:

Sub - Tasks	Additional authority needed	Plan for additional Training / Experience	Others to be notified	Date	Action
Review dates					