

## Delegating While Working Remotely

By Ed O'Neil, PhD, MPA

It is my experience that all good leaders are good delegators. This makes sense as, at its heart, leadership means working through others. But every leader can get better at delegating. Effective delegation leverages both the effectiveness of the person delegating and the one getting to test their leadership in new ways. Working at a distance creates challenges in delegating practices, but it can be done just as effectively.

Here are some thoughts on fine-tuning your delegation skills, even when done over Zoom.

1. **Start with a development plan for staff** — We previously discussed [supporting professional development at a distance](#) and made the case for everyone having a **plan for professional development**. Delegation is so much easier on both sides if you, as the leader, are committed to supporting direct reports through development goal setting and coaching. The delegation is not a work transfer, it is an activity that stretches staff to new levels of ability and achievement. If there is no development plan, now is an ideal time to set a learning goal for improvement.
2. **Know them, know you** — Once you have a plan for delegation, it is essential to review the **workstyle and preferences** of the person receiving the delegated work, the needs of the project or task, and your past experience with them related to delegation. Questions to consider:
  - Will they need more details about the particulars?
  - Do they like more freedom?
  - Are they creative or by the book?
  - Are they timely or a bit of a procrastinator?

These type of questions need to be discussed as you hand down the delegation. It is also important to juxtapose their style with yours. If you are both big picture people, attention to details needs to be called out. If they focus on the things and forget the people and you do the reverse, there might be conflict that will be easier if discussed ahead of time. If you both work quietly and independently, one or the other might start to wonder the status. In this case, a plan for updates should be discussed. Self and other knowledge, coupled with a discussion and plan to accommodate both parties, will go a long way to making the delegation successful. This is harder at a distance but can be achieved via well-focused Zoom one-on-

### About the Quick-Takes Series

This miniseries, part of the [Medicaid Leadership Exchange podcast](#), provides guidance to help Medicaid leaders during the COVID-19 crisis. The series, which includes companion videos and tip sheets, is developed in partnership with the National Association of Medicaid Directors and the Center for Health Care Strategies through support from the Robert Wood Johnson Foundation. For more information, visit [www.chcs.org/quicktakes](http://www.chcs.org/quicktakes).

ones before the undertaking starts and at strategic points over the course of the work. Do not forget to do an agenda for these sessions.

**3. Define the work** — Beyond the calibration of styles, there are the **details of the project or work** itself. A great deal of mischief in delegation crops up because this framework is not clearly and fully established at the outset. These are the core questions to address:

- What are the goals of the project?
- How does it fit with the larger organizational picture?
- What are the politics that might surround this work?
- What are the specific deliverables, timelines, and expectations of the project?
- What is the learning potential (tied to the development plan) of this project?
- How will it be evaluated?
- What resources are available?

It will be easy to overlook these when delegating at a distance, but don't.

**4. Define your role** — You have a **role in any delegation**, and it should be defined upfront. Not all delegations are the same and the level of your direct involvement will vary depending on the skill and maturity of the person receiving the delegation, the complexity and sensitivity of the task, and the context in which the work will be carried out. Most of these realities have changed in the past two months and will continue to be different as we go forward. This is also where you should think critically about what you need to keep you sane in the delegation. Communication, information, and participation in decision-making are all fungible and should, in part, be determined so you are comfortable. But don't be too comfortable, because part of the purpose of the delegation is to stretch staff, giving them more responsibility and independence. One helpful distinction here is that delegating a task is very different from delegating a responsibility, and you should be aware of the differences. A task delegation is a simple and direct delegation of a chore. For instance, "Will you call Bill and set up a follow-up discussion on the progress of our expansion working during COVID-19?" Delegating a responsibility is broader in its scope and independence. In this instance: "I want you to take the oversight responsibility for our COVID-19 coverage expansion. I'm available for questions of course and would like an update every two weeks."

**5. Remember to teach** — Do not forget that a major driver of a successful delegation is for both people involved to see it as a **learning opportunity**. In real time, use problem solving as the chance to teach larger issues. For instance, if a conflict arises, put it into the context of the larger political environment of the organization and teach how to resolve such a conflict in that setting. When delegating at a distance, you may be prone to miss non-verbal cues when a problem arises or when staff may be uncertain about an undertaking and needing a little more "teaching." The remedy is to ask more questions. But don't ask "Is this clear, or do you understand?" It is better to ask them to tell you what they see as the major barriers or the potential problems. This will keep them engaged and give you more useful information about their understanding and comfort in the situation or with the task. When the task or project is done, set aside an appropriate amount of time to review what was learned with the person who received the delegation. Before the meeting ask them to write down what they learned from the project in technical,

organizational, personal awareness, and leadership categories.

Working these techniques at a distance or in-person will make for easier and far more effective delegations. The more you practice them the more they will become second nature, and those on your team will also learn to push for these qualities every time they are on the receiving end.

## About Ed O'Neil

Ed O'Neil, PhD, MPA, is the owner of O'Neil & Associates, a management consulting and leadership development firm focused on change and renewal in the health care system. He was previously professor in the Departments of Family and Community Medicine, Preventive and Restorative Dental Sciences, and Social and Behavioral Sciences at the University of California, San Francisco, and director of the Center for the Health Professions, a training institute that he created in 1992. His work across three decades has focused on changing the US health care system through improved policy and leadership. To learn more, visit [www.oneil-and-associates.com](http://www.oneil-and-associates.com).

## About the National Association of Medicaid Directors

The National Association of Medicaid Directors supports Medicaid directors in administering the program in cost-effective, efficient, and visionary ways that enable the over 70 million Americans served by Medicaid to achieve their best health and to thrive in their communities. To learn more, visit [www.medicaiddirectors.org](http://www.medicaiddirectors.org).

## About the Medicaid Leadership Institute

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