

A checklist for giving and receiving instructions/delegation

Explanatory notes

The second pillar of MBC is all about Mindful Collaboration, including when asking others to work for or with you. This applies as much to instructions to a third-party supplier of services as it does to delegation within our own team or organisation. Further, although the onus may be on the person requesting the work, the recipient of the request can also have a major role to play. The following checklist therefore looks at both perspectives. It is intended to be relevant both to third party instruction and internal delegation – although inevitably some aspects will only relate to one or the other. It is not intended to be a straitjacket or something that must be reviewed every time work is given out or received, but it is intended to be a helpful reminder of things to keep in mind. It is hopefully something that people might feel useful to keep nearby for reference. Member organisations may want to think about adapting it for their own context, and/or including it (or elements of it) in any codes of conduct or other guidance as to mindful working practices.

When giving out work

When giving out work, whether to a third-party supplier or internally, it might be useful to think of three things – Who, What and When. And remember that clarity will always help, and vagueness (eg “fairly urgent”) will rarely do so.

Who

- Do I know the person I am instructing, do I know their role and working patterns and any holiday leave they may have booked – would a telephone call, in place of or in addition to an email, be helpful?
- Is their organisation an MBC member – would it be appropriate to mention MBC?
- What is my relationship with the person and how might they feel about that – if I am in a relative position of power to them do I need to be more mindful of making sure of the points in this checklist rather than relying on them to challenge/push back?
- Does the supplier/does our team have a work allocation protocol in place that I should be following?
- Do I need to let anyone else know about the instructions? For example, if you are delegating to someone in another team would it be sensible to inform their manager, so they are aware of the request?
- Why am I asking this person – should I be thinking about getting someone else involved rather than always going to the same person?
- Could I be clear with the person that they are welcome to get assistance from other people, and are there other people I could signpost them to for assistance?
- If internal, should I be offering to supervise the work?
- If internal, do I know the person is experienced enough to prioritise between competing requirements and, if not, should I offer to assist with that?

What

- Have I been clear enough about what I want to be done?
- Have I made clear who it is for, the purpose for which I want the work to be done and where it fits into any bigger picture?



- Have I been clear as to the format I would like the output to be in – is it a phone call, an email, or a more formal document?
- Have I been clear as to the level of detail I expect and any guidance as to how long I think it should take?
- Do I want the person to come back to me to acknowledge the instruction and/or to give an estimate of how long they think it will take and when they will be able to do it?
- Have I invited them to come back to me with any questions or anything they do not understand?

When

- Avoid unnecessary delay in requesting work to be done.
- What time of day/point in the week am I giving this instruction, and do I need to explain why (e.g. if it is late in the day or at the end of the week)?
- Have I set out clearly when I need it done and is this deadline reasonable both in terms of how long the work is likely to take and when I actually require the work? Have I been honest with myself as to when I am realistically going to look at the work that is produced?
- Where possible have I offered the opportunity to discuss when the person/their team is able to do the work rather than impose a deadline?
- Have I given the person permission to push back if they do not feel able to do the work by the time requested or if the situation changes before they are able to do the work?
- Would I like to receive an update on progress from time to time and have I communicated that?
- If the timetable changes, inform the person.

Afterwards, provide feedback and, also, if the work was for a client, provide feedback from the client.

When receiving work (whether delegated internally or from a client)

In the moment

- How do I feel having received the instruction – is it causing me stress and is that stress then clouding my judgment – can I take a minute to breathe, calm a little and consider the instruction more mindfully?
- Do I need some help with that and/or with prioritising my workload?
- Would a telephone call be helpful to chat through/clarify any of the following rather than creating additional email traffic?

Who

- If it is from someone outside my organisation, is their organisation an MBC member – would it be appropriate to mention MBC?
- What is my relationship with the person and how do I feel about that – if I feel that they are in a relative position of power to me do I need to be more mindful of making sure of the points in this checklist and do I feel able to do that – if not could I benefit from support from my senior?
- Do we have a work allocation protocol in place that should have been followed?
- Do I need to let anyone else know about the instructions e.g. my line manager?
- From an initial review, am I likely to need the input of other people to deliver the work – if so who, and can I request that input in the meantime before I

focus on my part of the work? Can I timetable sensibly when I will need that other input (using this checklist as a guide perhaps)?

What

- Am I clear about what is being asked of me?
- Am I clear who it is for, the purpose for which they want the work to be done and where it fits into any bigger picture?
- Am I clear as to the format they would like the output to be in – is it a phone call, an email, or a more formal document?
- Am I clear as to the level of detail they expect, have they given any guidance as to how long they think it should take and does that correlate with my sense of that?
- Should I acknowledge the instruction and/or give an estimate of how long I think it will take and when I will be able to do it?

When

- Do I have a clear understanding of when the person wants the work to be done by?
- Can I realistically do that?
- Do I have planned leave that will hinder my doing so?
- Can I push back, do I need to get someone else to help, what would I need to juggle/defer to make this deadline achievable and is that realistic?
- If I am going to need to miss personal commitments, would the person requesting the work want/expect that, does the work justify that, can I make that call, and do I need to discuss this with someone?
- Would it help to schedule some time in my diary to do the work and/or a reminder to myself, and would it help to get the email out of my inbox in the meantime? How will I remind myself that it needs to be done?
- What assumptions am I making in terms of expectations, and would it help to check out those assumptions?
- If I do not feel able to do the work, whether at all or in the timescale requested, who do I need to talk to about that and what is the earliest I can do that to avoid creating a crisis down the line?

Afterwards, seek out feedback.