



# Delegation and Rostering

The importance of delegating tasks across a team and the use of rostering

- Action planner template
- Delegation vs. allocation
- Steps to successful delegation- when to delegate
- Rostering systems



## 4.5 Delegation

### Why this is important

Delegation is one of the most important management skills. As an employer or manager you can't do everything that needs to be done. It is critical that you have an effective team that is competent and confident to keep the business running – delegating and building skills helps to foster this type of working environment.

Delegation allows people to grow in the job by enabling them to gain experience to take on higher responsibilities. It also builds trust, contributes to retention, as people build skills, knowledge and responsibility levels, often leading to higher job satisfaction. It is a very helpful aid for succession planning, personal development - and seeking and encouraging promotion.

#### This fact sheet will cover:

- Delegation vs. task allocation
- The steps of successful delegation
- When to delegate
- Delegation hints

Effective delegation is crucial for effective succession.

### Delegation vs. task allocation

It is important to understand the difference between delegation and task allocation. Delegation isn't just a matter of telling someone else what to do. When you delegate you transfer the task, the responsibility and the authority for getting the job done to the expected standard.

Allocating tasks does not instill the same level of empowerment delegation does, but sometimes it is more applicable than delegation (see table below). Careful consideration of whether you are delegating or simply giving someone else a task to do is an important part of successful delegating.

Instructing someone to "Wait to be told" or "Do exactly what I say" or "Follow these instructions precisely" is giving someone instruction not delegation.

Task allocation	Delegation
Follow my instructions...	Please be responsible for...
Carry out the pasture walk ..... Then....put up break fences after the 5th post in paddock 21, and feed out x number of hay bales for supplement feed.  (Instructed what to do, when and how)	Pasture walk the farm to develop the feed wedge so that you can allocate the right paddocks to meet feed requirements for the ewes for next week.  (Responsibility for pasture management and allocation of feed)

To delegate you need to have provided the person with some freedom to carry out the task. There is a wide range of varying freedom that you can confer on the other person. The more experienced and reliable the other person is, then the more freedom you can give.

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## The steps of successful delegation

1.	Define the task - make sure you are clear on what you are delegating. Is it suitable to be delegated – will the person gain knowledge or experience by taking it on, or are you simply reallocating tasks?
2.	Select the individual - What are your reasons for delegating to this person? What are they going to get out of it? What are you going to get out of it?
3.	Assess ability and training needs - Is the person capable of doing the task? Do they understand what needs to be done? If not, you can't delegate – you will need to coach them through the task, providing support and feedback throughout.
4.	Explain the reasons -You must explain why the job or responsibility is being delegated. Why have you delegated it to them? What is its importance and relevance? Where does it fit in the overall scheme of things?
5.	State required results - What must be achieved? How will the task be measured? Make sure they know how you intend to decide that the job is being successfully done. How you will check on progress needs to be discussed and agreed with the other person from the outset. If you don't, they may feel you're interfering or that you do not trust them to complete the task.
6.	Consider resources required - Discuss and agree what is required to get the job done. Consider other people, location, premises, equipment, money, materials, other related activities and services.
7.	Agree deadlines - When must the job be finished? Or if it is ongoing, will there be review dates? Is the task complex? Will it be completed in parts or stages, what are the priorities?  You may need to confirm understanding. Clarify understanding by getting feedback from the other person. Ask open-ended questions; get them to reiterate what you have discussed. Do they understand what is required? Are they confident enough to go away and complete the task?
8.	Support and communicate - think about who else needs to know what's going on, and inform them. Do other team members need to be involved? Make sure the person you have delegated to considers this so they can see beyond the issue at hand. Do not leave the person to inform their own peers of their new responsibility, you need to be the one to let the team know.
9.	Feedback on results - it is essential to let the person know how they are doing, and whether they have achieved their aims. If they haven't, you must review with them why things did not go to plan, and deal with the problems. Address failures but don't forget to celebrate success!

Make sure that the team member knows that you want to know if any problems occur, and that you are available for any questions or guidance needed as the work progresses.

When you first start to delegate to someone, you may notice that he or she takes longer than you do to complete tasks. This is because you are an expert in the field and the person to whom you have delegated is still learning.

Be patient: if you have chosen the right person to delegate to, and you have delegated the task correctly, you will find that he or she quickly becomes competent and reliable.

## When to delegate

Delegation creates a win-win situation when done appropriately, however that does not mean that you can delegate just anything.

To determine when delegation is most appropriate there are five key questions you need to ask yourself:

1. Is there someone else who has (or can be given) the necessary information or expertise to complete the task? Essentially is this a task that someone else can do, or is it critical that you do it yourself?
2. Does the task provide an opportunity to grow and develop another person's skills?
3. Is this a task that will occur regularly, in a similar form, in the future? Should it become their responsibility?
4. Do you have enough time to delegate the job effectively? Time must be available for adequate training, for questions and answers, for opportunities to check progress, and for rework if that is necessary.
5. Is this a task that I should delegate? Or is it more appropriate that I do it?
6. Do I need to delegate? How busy is my schedule? Could I delegate more to work on my business instead of in it?



If you can answer "yes" to at least some of the above questions, then it could well be worth delegating this task.

You also need to consider timelines/deadlines. How much time is there available to do the task? Is there time to redo the task if it's not done properly the first time? What are the consequences of not completing the task on time?

## Delegation hints

- When delegating it is important to keep the process transparent
- Make sure everyone is clear on what is required of them – provide detail on what, who, when by, how it impacts on other tasks etc
- Set up a board somewhere all staff can easily see it
- Update it regularly
- Involve staff in the decision of who is responsible for what
- Relate delegation back to people's training and development plans
- Have a team catch up once a week to work out what needs to be done, how things are progressing and to reschedule or schedule new responsibilities and tasks.

(Refer to the Staff Planning 1.5 Job Analysis 1.6 and Time Management 4.4 Fact Sheets for more information)

## What are the benefits to me?

At first, delegation can feel like more hassle than it's worth, however by delegating effectively, you can hugely expand the amount of work that you can deliver.

Delegating allows you to:

- Increase motivation
- Increase efficiency
- Develop skills for both the team and individuals
- Better distribute work throughout your team.

## What do I do next?

- Step back from the everyday tasks and identify where delegation could be beneficial for both you and staff
- Look through your staff training plans and identify areas that people have expressed an interest in improving in – are there opportunities to delegate?
- Develop a process and involve staff in getting it up and running.

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## 4.6 Rostering Systems

### Planning the workload and the work breaks

#### Why this is important

Time off is very important to farm employees and ensures they are refreshed for the time that they are on the job. Rosters are as important for farms with one staff member as they are for farms with large numbers of employees. A roster allows people to plan their time off and get more value from the break.

Planned rosters indicate that a farm system is organised and efficiently run. They also help employees form a picture of what the reality of daily life on a farm will look like and therefore help clarify the employer's expectations of the employee.

#### This fact sheet will cover:

- What is a roster?
- What makes a roster successful?
- How to make a roster
- How far in advance should a roster be planned?
- Things to consider when making rosters

#### What is a roster?

A roster is a list or a plan that shows when people who work on a farm will be on duty. Rosters are typically used for two purposes:

- To schedule time off for staff and employers
- To schedule work tasks for individual staff members.

Keeping a record of rosters is also an effective means of maintaining records of holidays taken and time off for staff.

#### What makes a roster successful?

Rosters can be made in many different ways. While some farming businesses use very formal rosters, such as a computer-generated spreadsheet roster, other farms operate equally efficiently on less formal rostering systems, such as notes made on a year planner.

The key to the success of a roster lies in the planning and organisation that has gone into developing it and the commitment of management to making the roster work. Employees need to know that the roster is fair and that management will stick to the roster except in extenuating circumstances.

Good rosters are simple, easy to follow and also have flexibility in them so that they work to support the people involved in the business. This means that they provide a guide as to how the work will get done on the farm, but they are not set in concrete.

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Rosters plan the work that everyone knows is going to happen. However on farms there are often unplanned tasks that crop up each day. A successful roster will incorporate a plan to manage the unplanned tasks likely to arise from time to time. For example the roster may plan for one person to have flexibility in their workload so that they can cover unplanned events.

## Making a roster to allocate time off

Allocating time off involves using a year planner to ensure that staff have regular breaks, plus their entitlements to statutory holidays and annual leave. There are 11 statutory holidays in a year and farm employees are entitled to four weeks' annual leave per year (for more information on leave entitlements for employees (see Legal Responsibilities Fact Sheet 1.1).

## Making a roster to allocate work

The basis of a roster that allocates work is the staff planning process outlined in the Staff Planning Fact Sheet 1.5).

When using the staff planning process to develop rosters it is useful to break the farming year into work or seasonal periods. For example:

- Lambing/calving period
- Scanning/weaning period
- Summer period
- Scanning winter period.

Start with only one work period at a time and plan how the tasks that need to be done in that work period will be allocated.

## How far in advance should a roster be planned?

It is a matter of personal preference as to how far in advance a roster is planned. However, it is important for staff to be able to plan what they will do in their time off and a longer roster will help them do this. This means that it is better to plan the roster too much in advance rather than too little.

Most employers or managers have planned well in advance how they intend to run their farm. This means that it is possible to make the roster for a whole year well before the year starts and in this way help give the employee a clear picture as to what time off they can expect and when they can expect it.

Planning a year in advance makes it possible to ensure, at the start of the season, that statutory holidays and annual leave can be covered by other staff. This means that the employer knows the work will still get done and the employee knows they will get their fair allocation of time off.

Changes to the roster can easily be made once the initial plan is in place.

### Things to consider when making rosters:

- Personal circumstances of employees
- Personal preferences of employees. For example do they prefer weekends or weekdays off? Does it matter to them?
- Age of employees, as this may affect how much time off they need and when they would prefer to have it
- Amount of pay and responsibility level of employee
- The availability of casual and part time staff The farm system and associated work requirements of the system. For example moving stock, or feeding out to stock.

## Types of rosters

Rosters may be written in many different ways. The following is a list of ideas for rosters:

- Use a year planner pinned to the woolshed kitchen or office wall
- Write it on a calendar
- Use a whiteboard in the farm sheep and beef
- Write it by hand (or draw it) on a piece of paper
- Use a computer spreadsheet.

## Other tips

### What do I do next?

- Work through the staff planning process outlined in the Staff Planning Fact Sheet
- Plan time off for all staff for at least three months in advance
- Talk to staff about their preferences for time off.

- Use coloured pens to highlight people and/or duties and time off
- Photocopy rosters to ensure everyone has an up to date copy.

## What are the benefits to me?

Well-planned rosters will help employers manage the workload on farm, making the farm run efficiently. Rosters also help to keep staff happy.

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