Executive Report:
The Art of Delegating: Create a More Productive Lab Environment
A Note from the Publisher

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Thank you for ordering “Executive Report: The Art of Delegating: Create a More Productive Lab Environment” from the Principal Investigators Association Library. This resource is designed to help you better understand— and make the most of—your lab team through proper delegation of specific tasks that may help lead to a more productive and successful research environment.

Bryan G. Helwig, PhD, served as co-author of this report. He has been a postdoctoral research associate and is currently a research physiologist/principal investigator in environmental pathophysiology while pursuing a masters in management at Harvard University. He has managed both academic and government research labs and additionally is experienced in strategic planning in the scientific environment. Recently, he received funding for two studies on aspects of heat stroke and heat strain and has published numerous abstracts and articles on related biomedical processes.

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Best Regards,

Leslie Norins, MD, PhD
Founder
Principal Investigators Association
9990 Coconut Road, Suite 316
Bonita Springs, FL 34135
Phone: (800) 303-0129
info@principalinvestigators.org
Table of Contents

A Note from the Publisher ............................................................................................................3
Overview.......................................................................................................................................7
Chapter I: Delegation Concept: Reap Countless Benefits..............................................................9
Chapter II: Follow 9 Steps to Delegate Successfully.....................................................................13
Chapter III: Delegate Effectively to Each Type of Lab Team Member.........................................19
Appendix A: Lab Personnel Structure Diagrams........................................................................23
Appendix B: Sample Assignment Sheet.....................................................................................25
Overview

The art of delegating goes hand-in-hand with the art of leadership. If you can master the art of delegating, you’ll achieve greater success in your lab, as well as personal career success. Further, you’ll help your lab workers reach greater successes in their own careers.

The art of delegating contains three main components that are critical:

1. You must have internal collaboration, creating an environment in which the PI and staff scientist work together.
2. You must cultivate a “team” mentality, ensuring that all laboratory members participate to shape the project at hand.
3. You must have an evaluation component, involving the PI as well as the lab members. The evaluation is continuous throughout the project, and then again after the project’s completion.

Ultimately, effective delegation should create a team atmosphere that exploits the talents of your lab staff member, leading to a more productive and successful research environment. Delegating effectively prevents rushing to meet deadlines, ensures timely data collection and frees up your time to do the other things that are on your plate every day.

When you don’t delegate properly, your lab workers may feel workloads are unequal and their work isn’t recognized properly. They may also develop feelings of jealousy and internal competitiveness.

All this can lead to a splintered and even hostile laboratory environment. On the other hand, successful delegation essentially enhances laboratory productivity.
Chapter I: Delegation Concept: Reap Countless Benefits

Delegating helps to cultivate your team’s expertise and develop leadership skills.

A typical lab structure involves personnel in a vertical hierarchy, which isn’t conducive to delegating (see Appendix A — Traditional Lab Structure diagram).

The PI has multiple responsibilities, overseeing all other lab employees. Beneath the PI is the lab coordinator, who is typically the “go-to person” and is often overloaded with responsibilities and tasks. The lab coordinator oversees the project leaders, who are project-driven. The project leaders oversee the technicians, post-docs, grad students and other scientists, who are all results-driven.

Instead of this vertical hierarchy, delegating artfully creates a “flat” lab environment, in which the PI is at the center of spokes on a wheel — each spoke relating to a staff member (see Appendix A — Flat Lab Structure diagram).

Your lab team consists of highly talented and motivated individuals who are seeking autonomy and recognition. If you aren’t delegating, you’re missing out on using those talents. You’re also creating a lackluster work environment for your staff with little employee enrichment.

Self Reflection: Do You Delegate?

For some PIs, self reflection on their leadership skills is difficult. But you can determine whether you delegate effectively by asking yourself a few key questions.

Do you:

• Overload the “go-to” person — usually the lab coordinator?
• Assume that your lab members will speak up?
• Believe that failure means the team member is unable to do his job?
• Underuse new lab members, fearing that they don’t have the necessary experience?
• Rush to meet deadlines, resulting in cutting close or missed deadlines?
• Worry about ethical issues?

If you identify with any of these questions, you’re not delegating effectively. Further, you might be micromanaging your staff and not acting as a leader.
Become a Leader to Delegate Artfully

You must become a leader — not a “manager” — to delegate effectively. The term “manager” often has negative connotations, implying a dominating, hierarchal supervisory role.

Conversely, a leader is:

• Empowering, encouraging and energizing
• A listener and approachable, with an “open-door policy”
• Emotionally intelligent
• Forward-thinking yet reflective
• Assertive when needed.

Lab team members are looking to you for leadership, and committed lab employees will become more productive. As a PI, you must get your scientists to “believe” in the project and understand its significance. This is critical to keeping your staff engaged and enthused about their work — especially the tasks you delegate to them.

If your scientists are passionate about the work, assigning tasks becomes easy because they’re already invested in the research. Delegating effectively also relies on staff members feeling recognized, acknowledged and appreciated for their efforts.

Build the 4 Cornerstones to Delegating

Effective delegation takes commitment. And after you’ve decided to become a leader and you’ve gotten your team invested, you can begin to build the four cornerstones of effective work assignment:

1. **Know your institute’s expectations.** If you — as a PI — don’t understand your institute’s expectations in terms of grants, manuscripts, committees, internal deadlines, reports, teaching and service-to-science, you won’t be able to effectively delegate to others. You must understand these expectations yourself to know what to expect from your lab team.

2. **Have a vision for the laboratory — and communicate it clearly.** Most PIs have a vision for their lab, but few make it a point to articulate that vision and write it down. You must clearly communicate this vision to your team members by documenting it and ensuring each worker thoroughly understands the purpose of your work.
3. **Determine your action plan and include goals.** You can take the action plan and goals directly from the grant proposals and project objectives that you’re writing on a regular basis. Ensure that the goals are attainable because this will maintain your team’s focus.

4. **Build in a feedback loop.** Solicit and consider feedback from your lab members during every step of the project. Because effective delegation is a process that evolves continuously over time, you need this feedback loop to keep improving and growing. ■
Chapter II: Follow 9 Steps to Delegate Successfully

After you've established the four cornerstones, you can embark on the nine steps to effective delegation:

1. Identify what you can and can't delegate
2. Select the right scientist(s)
3. Delegate entire tasks
4. Specify end points and due dates
5. Specify responsibility
6. Ensure understanding
7. Maintain a feedback loop
8. Address concerns in real time
9. Evaluate and reward.

1. Identify What You Can Delegate

Decide what tasks or responsibilities you can or can’t delegate. You shouldn’t appoint anything that requires your specific expertise. Also don’t assign anything related to seniority or authority issues and patents or exclusive knowledge. You’ll likely also not delegate tasks involving regulatory guidelines like the Health Insurance Portability and Accountability Act (HIPAA) and patient privacy.

Consider delegating anything else, including issues that another scientist can handle just as well as you or better. As you delegate more to your lab team, you’ll begin to find that each team member will become more knowledgeable and capable of dealing with a wide variety of issues.

2. Select the Right Scientist(s)

Take time to get to know your lab team members, so you can choose the right scientist for the given task. To delegate the right tasks to the right employee, you must know each team member’s strengths and weaknesses, as well as where and how each scientist can contribute in your lab. Also consider other unique insights that your staff members can offer to promote your lab and move it forward.

Another part of this delegation aspect is challenging your scientists. Never underestimate their potential. You should essentially overestimate what each team member can achieve, always giving the scientist a little more than you think he can handle.
Further, expect the team member to succeed. Remember that you’re working with talented and motivated scientists who will often surprise you with what they can do — if you give them the opportunity.

**Strategy:** Delegating effectively also involves sharing the fun — meaning that you should allow each team member a chance to participate in the fun projects and tasks like surgery. If you allow everyone to share the fun tasks, they will be more willing to help out with the tasks that aren’t quite so fun.

Keep the workload equitable as well. This doesn’t mean you have to give every scientist in your lab the same number of tasks. Instead, an equitable workload means that you’re giving each team member what he can handle. To do this, you must know your lab workers well and have a good understanding of their individual capabilities.

Finally, you must gauge reactions and be empathetic. If you give one of your scientists a project and he draws back a little, you should recognize this and consider that maybe the team member is overloaded with work because you’ve given him too much to do.

### 3. Delegate Entire Experiments

Assigning entire tasks — not piece-mealing singular experiments of a protocol — helps to increase feelings of autonomy, contribution and recognition among your scientists. Delegate the whole experiment to one of your scientists.

**Example:** If your lab is doing an assay, don’t give the team member just two rounds of the assay when the project involves completing 20. Instead, give the scientist all 20 rounds. If you give her only a portion of the experimental protocol or project, you’re essentially telling her that you don’t trust her enough to give her the autonomy for completing the project.

### 4. Specify End Points and Due Dates

Give due dates that are firm, instead of the vague due dates common in science. Also, give the firm due dates so that your team understands the “bigger picture.”

Tell the scientist why you need the task completed by a specific date, and help him to understand how to prioritize the task. Explain that he can order and rearrange his other tasks to meet the deadline. Involve the team member in the planning for the tasks as well.

Also, build some flexibility into the due dates. Keep in mind that because science is unpredictable, a task that you might expect to take just two days to complete may end up taking two weeks.

### 5. Specify Responsibility

Clearly specify the “who, what, when, why and where” of the task or goal. Don’t indicate the expected result because your scientists will feel “obligated” to achieve the results at any cost.
Instead, explain the project’s goals. For example, your project might seek to determine the major cyanotic blood levels in diabetics. Specify the goals clearly.

The “why” part is extremely important because you need to continuously reinforce how your team members’ individual contributions fit into the bigger picture.

Another consideration here is whether your staff members are “listeners” or “readers,” which can greatly affect how they interpret what you’re telling them. Listeners absorb information from you talking to them, while readers may not interpret what you say even if you tell them over and over again — they must see it on paper in writing.

One method you can use that will help you to communicate effectively to both readers and listeners is to give your scientists “assignment sheets” for each major task or project. (See Appendix B for a sample assignment sheet.) The assignment sheet should include key information — the “who, what, when, why and where”:

- **Who** — Jackie
- **What** — Assay for inflammatory cytokine expression.
- **When** — The results are needed by 6 p.m. on Monday, April 11.
- **Where** — Where will you store the results (for example, reserved chambers or rooms)
- **Why** — The results will demonstrate the cytokines up-regulated during fever. This will help us address objective 1 concerning which cytokines act in a negative feedback during endotoxin challenge.

### 6. Ensure Understanding

You can delegate a task and explain the “who, what, when, why and where,” but you can’t then just walk away. You must ensure that your team understands:

- **Be visual** — use diagrams, sketches, charts and other visual illustrations to help them understand the tasks at hand and how they fit into the project goals.
- **Ask scientists to summarize the task**, putting the project in their own words, to determine whether their thinking matches what you’re trying to communicate.
- **Relate the project to the “big picture”** — make the scientist feel invested and help him to understand how he’s contributing to the bigger project. How does the team member’s task fit into the lab’s whole focus, the grant objectives or the protocol? How is the task critical to the project’s success?
- **Make sure team members understand the theory** — this is especially important for new lab members. Ensure that each team member understands the theory behind the project so you can more effectively troubleshoot the experiment.
7. Maintain a ‘Feedback Loop’

The feedback loop involves a communication exchange between you (the PI) and your laboratory team. You can’t delegate experiments and tasks, and then not open your office door for two weeks. You must keep the communication flowing freely.

As the PI, you must:

• Maintain an “open door policy” and be available
• Hold weekly lab meetings to cultivate a cohesive environment and track progress without micromanaging
• Devise a centralized lab tool like an electronic calendar, which informs staff members when their colleagues are going out of town, as well as highlight project end points and due dates.

8. Address Concerns in Real Time

No matter how effectively you delegate and lead, you will inevitably face problems. The best way to handle problems is to address concerns in real time. Don’t allow problems to build up because this will create a fractured environment in your lab. Remember that although building a cohesive environment in your lab takes a lot of effort and time, shattering it takes very little.

First and foremost, make it safe for your team members to fail. This may seem counterintuitive, but keep in mind that science is unpredictable and hypothesis-driven, so sometimes experiments might not work or take some time to troubleshoot. Allow leeway for this “failure.”

If you chastise one of your scientists for failing to meet a goal or expectation, he’ll feel as if everything that he does must work with no exceptions. This is a dangerous environment — particularly for a scientific lab.

Of course, you can’t always let your scientists off the hook for missed deadlines or poor performance, but you should reassess your expectations. Maybe you overloaded the team member or set the bar too high when you overestimated his abilities.

First, let the scientist explain why he missed a deadline or produced poor work. Base your reaction on this explanation, and be diplomatic but assertive.

Also, the scientist should maintain responsibility for the project. On the first instance of a problem, don’t immediately yank the project out of the scientist’s hands and give it to someone else. Doing so will harm the environment that you’ve built in your lab. If the missed deadline is a one-time occurrence, come to an agreement with the team member and maintain his responsibility for the project. If you’re dealing with multiple problems, missed deadlines and poor performance, that’s a different issue altogether.
9. Evaluate and Reward

You must evaluate results on a continuous basis. And don’t focus solely on what failed, but instead look at both what worked well and what did not. When you look at what worked, retracing the steps to how you got there, you can apply these steps to uncovering how to correct what failed or didn’t work well.

Always acknowledge contributions and reward your team. No matter how small the contribution, ensure that you provide some kind of acknowledgement. Of course, pay raises and authorship are the traditional, structured rewards, but they aren’t the only ones that go a long way.

A verbal acknowledgement like a simple “thank you” or bringing in lunch to the lab can also work as effective rewards. Your aim is to ensure that your team members feel appreciated and recognized for their work.
Chapter III:
Delegate Effectively to Each Type of Lab Team Member

You can use the cornerstones and nine steps to delegate effectively to your lab staff. But you can also employ specific methods for assigning tasks appropriately to each team member.

First, you must look at each person’s strengths and challenges. Although you'll have some unique situations based on your particular lab and staff, many lab positions contain uniform characteristics.

Don’t Overload Your Lab Coordinator

Your lab coordinator has many strengths and typically knows how to do everything, offering expertise in many areas. PIs tend to rely on these individuals heavily and often overload them.

You must define the lab coordinator’s role clearly — is she focusing on only day-to-day operations or research as well? How much freedom do you want to give her? Will she delegate to the project leaders and other scientists in the lab?

Trust and communication are also critical for your relationship with the lab coordinator. This person is handling the daily lab operations, so build a strong rapport with her and ensure that you’re sensitive to how hectic her workload is.

Relieve the Time Crunch From Your Project Leaders

Your project leaders are often post-docs, but sometimes they’re lab technicians or senior grad students. They are typically very motivated and have extensive bench experience. Their challenges are that some are willing to attain results at any cost and have limited leadership experience.

When delegating to your project leaders, most importantly you should lead by example. Mentor them regarding how to become effective leaders. Also, you should strive to relieve the “results-at-all-costs” pressure that often plagues project leaders. Give them plenty of lead time and keep lines of communication open. If at all possible, never rush the project.

Meet with the project leaders and other involved scientists to find out how they feel about the work and the atmosphere. This is a good way to gauge the project leader’s skills without “checking up” on him.

Provide Bench Scientists With Intellectual Challenges

Bench scientists typically are responsible for collecting the data and may have a bachelor’s degree or a more advanced degree. They are smart, enthusiastic and good at their jobs.
The biggest challenges for bench scientists are keeping them engaged and intellectually challenged. One good strategy for staving off boredom for them is to give them a new task or set of experiments to work on, or give them a new technique to learn. You can provide increasing amounts of responsibility as appropriate.

Your open door policy will also help to keep your bench scientists engaged. You can also schedule exclusive monthly meetings with them to gauge the lab atmosphere.

**Use Hands-on Learning for New Employees**

Although new employees are typically quite enthusiastic, they’re also rather nervous. Aside from this, your biggest challenge with delegating to new employees is that they have a limited skill set.

The best way to engage new employees is to get them involved with the lab tasks immediately — in the first week. Gradually delegate work to new employees, giving them smaller tasks and responsibilities that they can complete successfully and bolster their confidence.

This “stair-step” approach will help new employees to become engaged and handle increasingly challenging tasks. You can also have your project leaders delegate to the new lab members, which will help your project leaders to develop their skills.

**Achieve Equitable Workload Distribution**

To delegate fair and equitable workloads to your staff, you must understand each of your team member’s strengths, weaknesses and personalities.

Be clear when you’re delegating, and prioritize tasks for your staff. Explain why their contributions are important and why the particular task is a top priority. Also, stick to the philosophy that more experience equals more responsibility. But at the same time, don’t underestimate your junior scientists.

You should also develop “laboratory empathy,” meaning that you need to sense when you’re overloading team members with too much work. Look for “overload signs,” such as:

- Missed deadlines
- Poor performance
- Tension and stress
- Resistance to delegated tasks.
Balance Delegation and Assertiveness

Delegation and assertiveness may seem like two different leadership styles, but they do in fact blend together. You may find balancing the two elements difficult, but you can do it by inviting input into the experiments, particularly during the development stage.

You can use your team's day-to-day, hands-on knowledge to help shape the grant proposals and bigger-picture objectives that you're composing. Soliciting input on the front end doesn't undermine your leadership or assertiveness — your assertiveness comes in when you make the final decision.

Know the Difference Between Delegating and Micromanaging

PIs who don't understand the differences between delegating and micromanaging are usually those with dissatisfied team members. When you're delegating, you are:

- Clear
- Available
- Breaking projects into sections
- Providing goals and key due dates
- Tracking progress.

In comparison, when you're micromanaging, you are:

- Hovering
- Taking back a delegated task
- Asserting control over the project
- Not trusting your team.

If you find yourself doing any of these, you are beginning to micromanage. Take a step back, and allow your team the time and space they need to complete the project.

Overcome Your Delegation Fears

Micromanaging is often a practice of PIs who are too afraid to delegate. Also, science is critically dependent on “controls,” so the desire to control projects is somewhat natural for PIs.
The basic fear associated with delegating is the idea that giving others authority or autonomy equals loss of control. But this isn’t true. In fact, delegating makes both you, as a PI, and your lab much more effective.

If you’re experiencing delegation fears or having problems “letting go,” you can:

- **Delegate in small steps** — After you see that your team member successfully completes a small portion of a project, you’ll become less fearful in assigning larger tasks.

- **Train your staff to meet your criteria** — Use examples and clear explanations of why you want your staff to perform tasks in a certain way. If you have a specific method for doing certain tasks, train them on your way of doing things and indicate your legitimate reasons for the particular methods.

- **Let your scientists do the experiments** — You’ll drive yourself crazy if you can’t effectively delegate the tasks that your team members are qualified to do. Remember, delegating tasks will free up your time to do the many other things on your plate for the day.
Appendix A: Lab Personnel Structure Diagrams

Traditional Lab Structure

- Principal Investigator
  - Lab Coordinator
    - Project Leader
      - Technician(s)
      - Post-Doc(s)
      - Graduate Students
      - Other Scientists
    - Project Leader
      - Technician(s)
      - Post-Doc(s)
      - Graduate Students
      - Other Scientists
Flat Lab Structure

- Project Leader
- Post-Doc
- Graduate Students
- Principal Investigator
- Technician
- Lab Coordinator
- Other Scientists
Appendix B: Sample Assignment Sheet

<table>
<thead>
<tr>
<th>Scientist</th>
<th>Task</th>
<th>Due Date</th>
<th>Comments</th>
</tr>
</thead>
<tbody>
<tr>
<td>Kevin</td>
<td>IL-6 and RelA Immunohistochemistry of Rat Liver Sections, Group A</td>
<td>April 15, 5 p.m.</td>
<td>Results address objective #1 of grant and will be used in the manuscript to be submitted in early May.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Place results in P: Drive</td>
<td></td>
</tr>
<tr>
<td>Sophia</td>
<td>Add the variables of time and temperature into the in silico model of endotoxin challenge</td>
<td>April 22, 5 p.m.</td>
<td>Test results of in silico model against our known outcomes for Subjects #150 - #160.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Results will be integrated into model</td>
<td></td>
</tr>
</tbody>
</table>
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