Administrative Tasks Checklist

This form lists tasks often managed or performed by managers for their groups. Empowered teams take on at least some of these tasks, and some teams have taken over all of them. Use the table to communicate to your team how you want these tasks managed. The column headings mean:

|  |  |  |
| --- | --- | --- |
| A | = | The team takes it over as soon as possible. |
| 6 | = | The team takes it over within six months. |
| 2 | = | The team takes it over in six months to two years. |
| M | = | You as the manager or team leader will do the task indefinitely. |
| N | = | Not applicable to this team. |

In general, the more complex a task and more training required to do it, the later it should be turned over to the team.

This is just a tool for you and the team, so feel free to modify items any way you want to. There are blank rows at the end of the table for you to add items if you wish. If you are not sure how you want a task handled, leave the row blank.

**Please note:** Tasks with gray boxes in their rows require specialized training and/or should be transferred only after the team is well established. So boxes in gray should not be used **unless** members of the team are already doing that task. Otherwise, use only the white boxes.

| **Task** | **A** | **6** | **2** | **M** | **N** |
| --- | --- | --- | --- | --- | --- |
| **Meetings** |
| Facilitation |  |  |  |  |  |
| Scribing |  |  |  |  |  |
| Reporting actions to manager |  |  |  |  |  |
| **Production** |
| Scheduling routine work |  |  |  |  |  |
| Project or work management |
|  Scheduling/timelines |  |  |  |  |  |
|  Budgeting |  |  |  |  |  |
|  Tracking progress/costs |  |  |  |  |  |
|  Reporting progress/costs |  |  |  |  |  |
| Equipment |
|  Selection |  |  |  |  |  |
|  Purchasing |  |  |  |  |  |
|  Maintenance |  |  |  |  |  |
|  Repair |  |  |  |  |  |
| Work supplies  |
|  Determining needs |  |  |  |  |  |
|  Tracking inventory |  |  |  |  |  |
|  Ordering |  |  |  |  |  |
| Quality |
|  Tracking |  |  |  |  |  |
|  Analyzing problems |  |  |  |  |  |
|  Correcting problems |  |  |  |  |  |
| Housekeeping (arranging or doing) |  |  |  |  |  |
| **Personnel** |
| Hiring |
|  Identifying needs |  |  |  |  |  |
|  Writing job descriptions |  |  |  |  |  |
|  Coordinating with Human Resources |  |  |  |  |  |
|  Reviewing resumes |  |  |  |  |  |
|  Interviewing candidates |  |  |  |  |  |
|  Talking with references |  |  |  |  |  |
|  Making final decisions |  |  |  |  |  |
| Training |
|  New members |
|  Technical skills |  |  |  |  |  |
|  Teaming and interpersonal skills |  |  |  |  |  |
|  Ongoing |
|  Identifying needed training |  |  |  |  |  |
|  Purchasing/arranging |  |  |  |  |  |
| Scheduling |
|  Work times |  |  |  |  |  |
|  Breaks |  |  |  |  |  |
|  Vacations |  |  |  |  |  |
| Time-keeping/attendance |  |  |  |  |  |
| Performance |
|  Providing input to manager |  |  |  |  |  |
|  Skill testing |  |  |  |  |  |
|  Appraisals |  |  |  |  |  |
| Discipline |
|  Informal mediation |  |  |  |  |  |
|  Formal mediation |  |  |  |  |  |
|  Oral counseling |  |  |  |  |  |
|  Written counseling |  |  |  |  |  |
|  Coordination with HR |  |  |  |  |  |
|  Decisions to terminate |  |  |  |  |  |
| Compensation |
|  Achievement rewards  |  |  |  |  |  |
|  Formal bonuses |  |  |  |  |  |
|  Base pay |  |  |  |  |  |
| **Liaison** |
| Internal customers |  |  |  |  |  |
| External customers |  |  |  |  |  |
| Other divisions/teams |  |  |  |  |  |
| Suppliers |  |  |  |  |  |
| Upper management |  |  |  |  |  |
| **Financials** |
| Budgeting |  |  |  |  |  |
| Reporting results |  |  |  |  |  |
| Analyzing reports |  |  |  |  |  |
| **Other** |
|  |  |  |  |  |  |
|  |  |  |  |  |  |