



WORK-LIFE
BALANCE



Atlas



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Exercise #1

Read each statement and then check the box to the right that indicates the degree to which you agree or disagree with it

1. I feel like I have little or no control over my work life.					
2. I hardly have time for my hobbies or interests outside of work.					
3. My loved ones frequently complain that I don't spend enough time with them.					
4. I often feel anxious or upset because of what is happening at work.					
5. I never use all my vacation days.					
6. I eat lunch at my desk.					
7. I often work all day with hardly any breaks.					
8. Most days, I feel overwhelmed and overcommitted.					
9. Most of the time, I feel exhausted.					
10. I feel guilty when I can't find time to do something – for work or outside of work.					

(continues on the next page)

Exercise #1 (continued)

11. I never say <i>no</i> when asked to take on a new task at work.					
12. I frequently think about work even when I'm not working.					
13. I usually work longer hours than my schedule dictates.					
14. When I have an obligation outside of work that I need to do during my normal work hours, I fear I'm slacking off.					
15. I procrastinate.					
16. I feel as though I could be working much faster and more efficiently.					
17. I hardly have enough time to sleep, exercise, or take care of myself otherwise.					
18. I feel like I need to work harder and longer in order to prove myself at work.					
19. My life feels disorganized and frantic.					
20. I feel like in order to accomplish anything, I have to do it all by myself.					

(continues on the next page)

Scoring Guide for Exercise #1

Count the number of times you checked boxes in each of the following columns.

Response	Number of Times You Checked It		
Strongly Agree		}	Add the Strongly Agree and Agree numbers together to total:
Agree			
Neither Agree Nor Disagree			
Disagree		}	Add the Strongly Disagree and Disagree numbers together to total: _____
Strongly Disagree			

Results:

My Strongly Agree and Agree total is much larger than my Strongly Disagree and Disagree Total – It’s quite possible that you overwork yourself. Let’s dive head first into this work-life balance workshop and see if there are things you can do to improve this situation.

My Strongly Disagree and Disagree total is much larger than my Strongly Agree and Agree Total – You seem to have a good handle on your work life, and you’re not feeling overwhelmed by the responsibilities of the job. So, thanks for attending but I may not have much helpful advice to offer you. On the other hand, you’ll be a great contributor of additional ideas during this workshop!

My two totals are rather close to one another – You seem to be somewhat balanced. Good job! There’s still some room for improvement, however, so as our workshop continues, focus on those specific areas where you checked “Disagree” or “Strongly Disagree.”

WHAT DOES “MUCH LARGER” MEAN? *The answer to this question depends on how many times you checked **NEITHER AGREE NOR DISAGREE**. If you never checked that box, then a score of 17 or more would be considered much larger than a score of 7 or less. But that ratio changes if you checked **NEITHER AGREE NOR DISAGREE** for one or more items. For example, suppose you checked the center box four times. That means that there are sixteen items left. In that case, a score of 10 would be considered much larger than a score of 6.*

Exercise #2

Rank order the following items 1 on up, reflecting how much time you spend on that activity over the average year (or as close as possible to what you might consider an “average” year on each one). 1 = I spend the **most** time on this. Highest Number You Use = I spend the **least** time on this. For any of the following that you don’t do at all, simply rate it “0.”

- | | |
|-----------------------------------|--|
| _____ Teaching Majors | _____ Personal Hygiene/Grooming |
| _____ Teaching Non-Majors | _____ Leisure/Hobbies |
| _____ Advising Students | _____ Spending Quality Time with Family |
| _____ Developing/Revising Courses | _____ Volunteering |
| _____ Conducting Research | _____ Taking Care of Myself/Relaxing/Recouping |
| _____ Writing Up Research Results | _____ Commuting |
| _____ Writing Grant Proposals | _____ Home Maintenance |
| _____ Doing “Administrative Work” | _____ Spiritual Life |
| _____ Email | _____ Health and Fitness |
| _____ Meetings | _____ Sleep |

Exercise #3

Now rank order those same times on the basis of how much time you *wish you spent* on that activity over the average year (or as close as possible to what you might consider an “average” year on each one). 1 = I **wish I spent** the **most** time on this. Highest Number You Use = I **wish I spent** the **least** time on this. As in Exercise #2, for any of the following that you don’t do at all, simply rate it “0.”

- | | |
|-----------------------------------|--|
| _____ Teaching Majors | _____ Personal Hygiene/Grooming |
| _____ Teaching Non-Majors | _____ Leisure/Hobbies |
| _____ Advising Students | _____ Spending Quality Time with Family |
| _____ Developing/Revising Courses | _____ Volunteering |
| _____ Conducting Research | _____ Taking Care of Myself/Relaxing/Recouping |
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| _____ Writing Grant Proposals | _____ Home Maintenance |
| _____ Doing “Administrative Work” | _____ Spiritual Life |
| _____ Email | _____ Health and Fitness |
| _____ Meetings | _____ Sleep |

Exercise #4

Grade yourself on your current status in Exercises #1 - #3 and draw conclusions from them. **IMPORTANT:** You haven't "failed" if you give yourself a low grade. You've simply identified the fact that you need to learn how to do better in this area. Fortunately, this workshop is about how you can do that.

Based on Exercise #1, my current state of work/life balance seems:

- A. Excellent**
- B. Good**
- C. Satisfactory**
- D. In Need of Improvement**
- F. Poor**

Based on Exercises #2 and #3, I'd probably be more satisfied and fulfilled if I could do **less** of these things (don't feel obliged to fill in every blank):

1. _____
2. _____
3. _____
4. _____
5. _____

and do **more** of these things:

1. _____
2. _____
3. _____
4. _____
5. _____

Exercise #5

Distinguishing “Work” From “Non-Work”

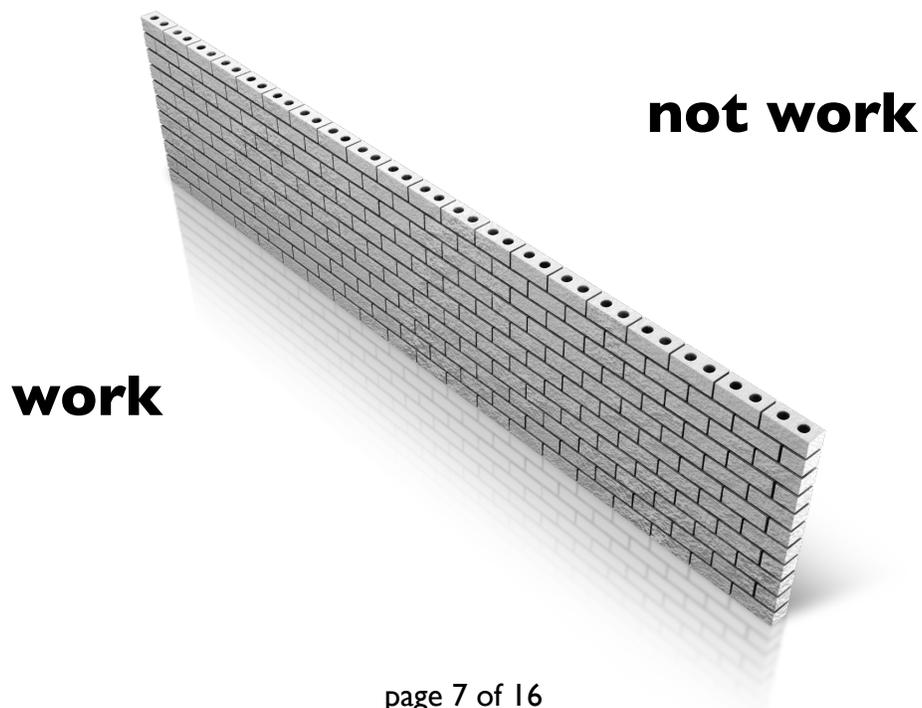
What is “work” and what is “not work” for you? Try to come up with at least five examples of each.

Part A. I consider these things to be work:

1. _____
2. _____
3. _____
4. _____
5. _____

Part B. I consider these things *not* to be work:

1. _____
2. _____
3. _____
4. _____
5. _____



Exercise #6

Why is it hard for you to say *no*? Circle the appropriate numbers and then total your score.

1. I feel guilty when I say <i>no</i> .	1	2	3	4	5
2. I don't like being perceived as rude, impolite, or uncooperative.	1	2	3	4	5
3. When I'm put on the spot, I can't think of a good reason for saying <i>no</i> .	1	2	3	4	5
4. I hate being perceived as the bad guy (or a bad person).	1	2	3	4	5
5. I like to make everyone happy.	1	2	3	4	5
6. I don't like being thought of as someone who doesn't work hard.	1	2	3	4	5
7. I like being regarded as a "lifesaver" or "hero."	1	2	3	4	5
8. I don't like doing things that risk my job because any job is better than no job at all.	1	2	3	4	5
9. I'm afraid of disappointing other people.	1	2	3	4	5
10. I like being the "go to person." I pride myself on being dependable.	1	2	3	4	5

Common Reasons Why People Find It Hard to Say No

According to Kerry Ann Rockquemore, President and CEO of the National Center for Faculty Development & Diversity

Technical Errors

- You literally don't know how to say "no" in a manner appropriate to the context.
- "Yes" is your default response (and you feel must have an extraordinary reason to say "no").
- You have no idea how much time "yes" takes.
- You haven't recognized the connection between the time required to fulfill "yes" commitments and the time you feel you're missing for truly important activities.
- You don't have a clear and consistent filter to help you decide when to say "yes" and when to say "no."

Psychological Blocks

- You're a pleaser (i.e. you're more concerned about people liking you than you are about meeting your own goals).
- You're trying to be super-professor or superstar worker (i.e. trying to do a little of everything but not doing any one thing well).
- You're a perfectionist.
- You feel overly responsible for things that aren't entirely your responsibility.
- You believe everything will fall apart unless you do the work.
- You're overcompensating and/or trying to prove you belong.
- You always put other people's needs before your own.

How To Say No

Idea #1: Create an Informal "No Committee"

- Ask 2-3 colleagues to work with you as an informal "No Committee"
- Whenever you get a request to take on additional duties, don't commit immediately
- Take the request to your "No Committee"
- They are to either:
 - a. Recommend that you should agree, giving you reasons why
 - b. Recommend that you should say "no," giving you reasons why

Idea #2: Think in Terms of "Career Chapters"

- Think of your career as a book with many chapters
 - Each chapter has a theme or focal point, such as "The Assistant Professor Chapter" or the "Mid-Career Staff Member Chapter"
 - When new responsibilities are offered to you, ask yourself, "Does this assignment fit the theme of my current chapter?"
 - If it doesn't, say *no*

How To Say No (continued)

Idea #3: The “To Do” List and the “Said No” List

- Keep two lists:
 1. Things you have to do (this week or this month)
 2. Things you’ve turned down (this week or this month)
- Whenever you’re tempted to add something to your “to do” list, you have to add something to your “said no” list to keep them in balance
- At times that means moving an item from the “to do” list to the “said no” list

Idea #4: Script a “Positive” No

1. Never accept or decline immediately.
2. Don’t start saying *no* by apologizing.
3. Start by expressing gratitude for being considered.
4. Then say *no* and give a reason for your refusal.
5. Don’t lie.
6. Express disappointment for not being able to take on the opportunity. (*Here’s where you can apologize.*)
7. Then immediately repeat your gratitude for being considered.
8. Suggest someone else who has the ability to complete the task. [\neq “under the bus”]
9. End by saying something positive and forward-looking.
10. If the other person keeps insisting you take on the task, be repetitive.



Exercise #7

How assertive are you? Circle the appropriate numbers and then total your score.

1. I am able to say <i>no</i> when I don't want to do something.	1	2	3	4	5
2. I ask for help when I need it.	1	2	3	4	5
3. I question matters when I'm confused.	1	2	3	4	5
4. People who know me best would probably say that I express anger appropriately.	1	2	3	4	5
5. People who know me best would probably say that I express annoyance appropriately.	1	2	3	4	5
6. I offer my opinion when I disagree with others.	1	2	3	4	5
7. I look people in the eye when I'm talking to them.	1	2	3	4	5
8. I speak up regularly in meetings.	1	2	3	4	5
9. I believe that I speak with a generally confident manner.	1	2	3	4	5
10. In conversations with others, I defend my opinions to my own satisfaction.	1	2	3	4	5

Exercise #8

Finding the Right Timeframe

DIRECTIONS: All of us have different timeframes when it comes to integrating our life and work. On the continuum below, pinpoint where you personally would find the greatest relaxation and refreshment.

- A three-day weekend more frequently?
- An entire month or longer less frequently?
- Something in between?

I would prefer to have

**A three-day
weekend
every few
weeks.**

SOMETHING IN BETWEEN

**An entire
month or
more off
every few
years.**



HYPOTHETICAL CASE STUDY #1

Transforming Aggressiveness into Assertiveness

Cross N. Truculent reports to Pliant N. Tractable at Confrontational State University. Because of a series of budget cuts, everyone in Pliant's area has had to take on additional responsibilities. Because student recruitment and fundraising are important to this area, Pliant has assigned everyone in the office a number of activities that will require them to attend a few events on the weekend and in the evening during the coming year.

The next morning, Cross shows up in Pliant's office, tosses a print out of the work schedule for the coming month onto Pliant's desk, folds his/her arms, and leans angrily toward Pliant. "What the hell is this?"

"It's the new work schedule," Pliant replies. "We been talking about it at our meetings for the last few weeks. Since we couldn't replace Mark or Alexandra when they left, all of us have to take on a few more duties. And unfortunately, that means fundraising events in the evening every now and then and student recruitment events on a few weekends."

"Well, I'm not doing that," Cross declares categorically.

"Look, Cross, if each of us just does a few of these events ..."

Cross interrupts Pliant. "Show me in my contract where it says I have to work evenings and weekends."

"I doubt if any of our contracts says exactly ..." Pliant attempts to respond.

"I said, SHOW ME IN MY CONTRACT WHERE IT SAYS I HAVE TO WORK EVENINGS AND WEEKENDS," Cross responds again, raising his/her voice.

"All of our job descriptions say, 'And other duties as assigned,' Cross. This is just one more of those duties."

"Well, you're even more incompetent than I thought you were if you assumed you could just order me around like this." Cross tightens his/her folded arms, narrows his/her eyes, and leans back defiantly.

"There's no need to get personal, Cross, it's just that we ..."

"This IS personal, and you know it, Tractable," Cross replies. "I've got young children at home and, for what you're paying me, I can't afford extra child care simply because you won't do the job we're paying you for."

"I actually am doing the vast majority of these events by myself, Cross. There's just a few of them that I can't make or that require several people."

"Not my problem," Cross says, turning and starting to leave the office. "You can expect a formal grievance on your desk within an hour."

After reading this case, reflect on it (or discuss it in small groups), considering the following questions:

- 1. What did Cross N. Truculent say and do that is appropriately regarded as aggressive, not assertive?**
- 2. How could Cross N. Truculent have made his or her case assertively, but not aggressively?**
- 3. Would an assertive style probably be more effective in this case?**



HYPOTHETICAL CASE STUDY #2

Making Tough Choices

DIRECTIONS: If you regard your position as primarily that of a faculty member, read and reflect on case study #2.1. If you regard your position as primarily that of a staff member, read and reflect on case study #2.2.

Case Study #2.1

Dr. Anita Massage has been working as a faculty member in the Department of Neurological Arts Management for five years. This field is her passion, but she is going up for tenure next year and is starting to feel the pressure. Her department chair has also been urging her to work towards improving the results of her teaching evaluations, which have been satisfactory but not stellar, and there have been several student complaints that she seems disorganized, unprepared, and at times even sleepy during her classes. Additionally, she has been working part-time as an indoor cycling instructor both to keep herself in shape and to help pay off her \$40,000 in student loans.

What recommendations would you give to Anita that might help her achieve her career goals while also providing more balance in her life?

Case Study #2.2

Manny Peoples is a coordinator in the office of financial affairs. Due to severe budget cuts and lay-offs, Manny has had to take on duties and responsibilities that would normally be divided between three other full-time positions. His working extra hours to accomplish all of these tasks is getting in the way of being able to spend time with his small children at home. Meanwhile, his elderly mother has been coping with a long-term illness, and Manny has no other family nearby to help take care of her. For the past ten years, Manny has also been involved in the Rotary Club, and everyone tells him that he'd be a shoo-in for president next year. He gets great satisfaction from the Rotary Club and thinks that he's be a great president.

What recommendations would you give to Manny that might help him achieve his life goals while also providing more balance in his life?

HYPOTHETICAL CASE STUDY #3

Getting the Timing Right

Imagine that you're a dean and that two of your department chairs, Dale E. Problems and Sarah Tonin, have each come to you with a similar set of complaints: They're feeling overworked, their level of job satisfaction has plummeted, they're experiencing increasing anxiety and self-doubt, and their families are complaining that they "never see them" anymore. Each believe they need better work/life balance.

Dr. Problems says, "My days are just crazy. I seem to be working from the time I get up until the time I fall asleep, exhausted. I assumed that, as a department chair, I'd put in my required office hours from 8:00 until 5:00 and then my time would be my own. But it hasn't worked out that way. I need some relief from my responsibilities. Can you help me?"

Dr. Tonin says, "You know that, for me, my work has always come first. One of the reasons why I accepted this position as department chair is that I wanted to build up my retirement fund. I love to travel, and my plan is that, after I retire, I'm going to go see the world. But in the meantime, the work just seems to be eating me up. I need some relief from my responsibilities. Can you help me?"

While you're sympathetic to the concerns of both department chairs, your budget simply doesn't have the resources to hire additional assistant chairs or even to provide release time for other faculty members to assume some administrative duties of these two chairs. You do have a small fund of non-recurring funds that you could use to help, but you couldn't do anything more than allocate a maximum of ten thousand dollars for each chair on a one-time-only basis. How might you use these funds, coupled with advice of choosing the right time frame for work-life balance, to help Dr. Problems and Dr. Tonin, two highly valued chairs that you would hate to lose?

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WORK-LIFE BALANCE

Finding a work-life balance is good for both your physical and mental health. But many times, the heavy job responsibilities that academic leaders have steal their balance away. What can you do about it?

- Set boundaries with yourself and your work colleagues regarding emails, so that you can take care of work communications only while at work.
- Prioritize important tasks and do these tasks first each day. This way, the most important things always get done.
- To whatever extent you can, leave work at work. Doing so may be hard—it may not even be possible—but it actually makes you *more* efficient in the long run.
- Remember that you don't need to be perfect. Have you ever been on your way out of the office, only to turn back around because you thought of a way to make a email message or task perfect? Sometimes, it pays to remind yourself that you and your work are good enough.

