



Setting limits at work and in your personal life

Reflection guide

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Overview

- Identify the challenges and benefits to setting limits at work and personal life
- Assess personal strengths and vulnerabilities of your delegation style
- Develop assertive communication techniques to manage time more effectively
- Create strategies for setting limits and delegating at work and personal life

Key takeaways



Main points:



Learning insights:



What areas do I need to improve on?



My action plan:

There's too much on my plate

Most people today have far too much "on their plates." In order to effectively manage your lives and avoid overload and/or stress-related illness, it is critical for you to establish boundaries and to share the workload with colleagues, if possible, and household/family responsibilities with other family members. The purpose of this session is to inform you about the importance of setting limits in your life and delegating those tasks that can be delegated. To help you identify areas that cause work and personal life responsibility "plates" to overflow, indicate one task for each "plate" that you would like to say "no" to or delegate.

I would like to get the following tasks off my "plates":

- Work
- Family
- Home
- Social

What is one idea that I can use from today's workshop that will help me set limits, delegate, and remove one thing off my plate?

Barriers to delegation

If you have trouble delegating, the following reasons may be the cause. Please place a check next to the factor(s) that are true for you.

- Perfectionism: "I'm the only one who can do this task, and I know how it has to be done perfectly." In the current business climate, people are very concerned about having things done just right.
- Guilt: "I feel guilty about asking someone else to do something that I've always been in charge of. Other people are busy, too, and I feel guilty about adding to their load. I'm the one who's supposed to do it."
- Fear of criticism: "If I delegate, I might be criticized for not doing the work myself or for giving it to another person who may not do a good job. I feel responsible for whomever I delegate to and for what that person produces."
- Fear of telling others what to do: "I've never been comfortable asserting myself; it's so hard to assign tasks to others. It makes me feel bossy."
- Unclear understanding of the job and what it entails, so it would be difficult to delegate pieces of it: "I might not fully understand what is required of me. Then if I delegate, the job might not be done correctly. That will reflect on me."
- Unfounded concerns that it will take too much time to explain how to do a task: "It's so much easier just to do the task myself because it takes too much time and effort to show someone else what to do."
- Fear of being outperformed, particularly if it is by an employee I supervise.
- Difficulties with letting go and giving up control: "I feel a lot of ownership for things that I've created, started, or been responsible for. I just can't give that up - it's a real part of me and who I am!"

How to set limits

- Be honest with others about your workload
- Use assertiveness skills and nonverbal language
- Be brief when providing an explanation
- Offer a compromise or alternative time when appropriate
- Learn to say "no" instead of "maybe"
- Let others know if you are on a deadline and unable to provide assistance
- Use the 2+1+1 technique: two positive statements of interest in providing assistance, followed by a negative statement regarding your limitations, followed by a positive statement of the conditions under which you can provide assistance.
- Use do not disturb features on your voicemail and email

- Ask “Is my attendance required vs. optional for this meeting?”
- Consult you manager when you workload becomes difficult to manage
- Separate from work at the end of the workday

Setting limits when you work from home

Know your manager's expectations. Talk with your manager regularly about work expectations and know what is needed in terms of work output. Whether you are already tele-working and want to adjust your schedule for better balance or are just getting started, up-to-date information about your team's goals and your manager's expectations for you are essential. Set up a regular meeting with your manager to ensure that you stay current with team needs.

Determine when you'll be "on duty" and when you'll be "off duty." Take the time to analyze your schedule to determine when your manager, team, and customers need to interact with you the most. When should your workday start and when should it end? Is it important to have weekends that are generally off duty? Will there be times when you're not working but are available for urgent questions? If you have the flexibility to take breaks from work during "normal" work hours, for example, to go to the gym at lunch a couple of times a week, how will you shift your workday to make up that time?

Talk with your manager about your weekly schedule. Prepare a draft of how you would like to set up or adjust your schedule and discuss it with your manager. Negotiate a plan that allows you time to recharge and come back to work energized. Reassure your manager that you are still committed to your job and that you of course, expect to flex your schedule like the rest of the team when there is a work crunch.

Let co-workers or clients know when you will be available. A regularly updated voice-mail message is even more essential when you work from home. An example would be a voice message that says, "Hi, you've reached Mary. I am in the office today, but I will not be available to return calls until 11:30 a.m. If you need immediate assistance, please call Account Services at 624-6475." This lets people know that you're there; you're just not available at the moment they called. You could also use an electronic calendar that others may access, send out a weekly schedule, or issue email reminders about when you'll be "out of the office."

Talk about and agree on some ground rules with managers and co-workers. These could include expectations about how soon email and voice-mail messages will be answered, how frequently you will communicate with managers and co-workers to

update them on your progress on shared work, and how you can be contacted in case of urgent work issues. Agree on these ground rules with your manager and co-workers - and possibly your clients -- so you all have the same understanding of when you will be available, how quickly you will respond to different kinds of messages, and how those rules might apply in situations that are urgent.

Use technology wisely. Use voice mail and email to your advantage. As long as co-workers and clients feel sure that you will respond in a timely manner, you can decide to allow yourself blocks of uninterrupted time to focus on important work. You might come up with a special signal as a way of alerting you to an especially urgent request. Sometimes it can seem like emails, voice mails, texts, and instant messages are controlling your life, but if you can make a conscious effort to use these technologies wisely, they will work for you.

Create signals that indicate to family members or others in your home when you are working and when you're not. Some people close their "office" door when they are working as a signal to family members that they aren't to be disturbed. Others may post a schedule in a common area or talk to family members about the coming workday.

Create as much separation between work and home as you can. Have a dedicated workspace in which you only do work. If possible, make it an area that's away from the common areas of your home. Install a separate phone line for work calls that you can turn off in the rest of your home after work, and if you have an office door, close it when you are not working so you can't easily hear the phone.

Take scheduled breaks. Just because you're at home doesn't mean that you shouldn't stop for lunch or a break; leave your work area and eat in another part of your house or go for a walk.

Delegation

Good tasks to delegate (for managers)

- Tasks you do over and over
- Less-than-essential tasks that require skills you don't currently have
- Tasks that don't have immediate deadlines
- Tasks that an employee has shown a particular interest in
- Tasks that prepare employees for positions the company will need to fill
- Tasks that fill gaps in employees' present capabilities

What are the benefits of delegation for the delegator?

What are the benefits of delegation for the delegate?

Are there some situations or times when delegation is neither possible nor appropriate?

Delegation model

Prepare

- What do you want to delegate?
- Why?
- Who?

Plan

- Meet with delegate
- Explain task & check for understanding
- Create action plan

Discuss

- Review plan
- Identify challenges and solutions
- Give ownership & express confidence

Audit

- Monitor delegate's progress, no hovering
- Provide productive feedback

Appreciate

- Acknowledge efforts and results
- Recognize & reward performance

Summary tips for effective delegation

- Delegate to people who can accept the responsibility
- Match delegated tasks to talents and interests. Build confidence by giving easy projects first
- When appropriate, delegate the full task
- Remember to invest time in training him/her since they may not do the task as well as you
- Encourage the person to solve problems as they arise, but be available for coaching.
- Establish measurable and concrete objectives
- Define the limits of authority that go with the delegated task
- Set up mutually agreed-upon deadlines
- Develop a system for checking in. Keep a record of tasks and people you delegate to help monitor

Steps for delegating at home

These tips are especially useful for delegating in your personal and family life. The strategies, when modified, work well with roommates and spouses.

D Determine that all people can help with household chores and family responsibilities. It's necessary to enlist the cooperation of everyone and to acknowledge that all need to help. Families that participate in sharing household chores and other responsibilities tend to be strong and connected.

E Evaluate the jobs that need to be done and assign responsibilities or let people choose. What needs to be done? Who is the best person to do it? These decisions can be made during family or roommate meetings. Some tasks can be assigned; others can be selected. Rotate the less-appealing chores.

L List the components of the tasks and chores. Take time to explain or train others. The time and effort you initially exert will pay off in the long run. However, this can be tricky with roommates and spouses. It's harder to tell other adults how to do things; children tend to be more willing to accept guidance.

E Engage the “delegate” in a positive way. Be clear about what the task is, your expectations, the time frames, and the degree of freedom the person has. Use assertive communication skills, and appreciate the other person's needs, schedule, preferences, etc.

G Give up your way of doing things and accept the ways of others. While it's generally admirable to have high standards, when delegating it's more useful to set more reasonable measures. The “I can do it better - I can do it faster” perfectionist approach makes others feel as if their contribution is not good enough. While you may fold the laundry in a way you feel is best, it's important to accept another person's ways if you want the help. Avoid negative statements such as: “If I knew you'd do it that way, I'd do it myself.” Sarcastic and angry comments make the other person defensive; they don't encourage cooperation.

A Appreciate the help and contribution of others. Most people respond to praise and gratitude. For example: “Sean, I'm so glad you helped with cleaning up the kitchen. Now we have more time to play your favorite game.” It's important for children to see that there's a pay-off for them. Doing household chores gives them an opportunity to develop ability, confidence, and self-esteem.

T Train others who will be doing the tasks. Part of the job of being parent is to teach children how to take care of themselves and their surroundings. This can get tricky with spouses, and roommates who don't appreciate having another adult tell them how to do the laundry, clean a room, do yard work, etc.

E Encourage participation by providing support and constructive feedback. Most delegation requires management. Once you've delegated a task, don't assume that it's completed. With children, it's helpful to make your expectations clear and then follow up. Your son might think that cleaning up his room means putting his clothes under his bed! You'll want to reinforce your definition of "clean," i.e., put the dirty clothes in the hamper, make the bed, put the books and toys on the shelf, etc. Be sure to let others know when they are accomplishing a task well.

Chores & tasks your children can do

All children, even preschoolers, can help out with household chores. Giving children responsibility at home helps to develop their capability, and it builds their self-esteem. As a parent, you want your child ultimately to be independent and self-sufficient. This process starts when children are little and continues as they grow into adulthood. The following is a list of age-specific chores:

3-4 years old: Children of this age need lots of reminders, training, and guidance.

- Dress self (put on pants, socks, shoes, sweater, shirt).
- Pick up and put away toys
- Empty wastepaper baskets
- Help set table, clear dishes
- Put dirty clothes in hamper
- Close drawers in room

5-6 years old: Children continue to need to be guided and reminded.

- Set and clear table and assist in meal preparation.
- Feed pet; clean out pet box, cage, etc.
- Help put away groceries
- Put away games, toys, books, and clothes
- Take out trash
- Water plants
- Make bed

7-8 years old - Children like to feel "grown up." Tasks should reflect this.

- Sweep floors and walks
- Help with grocery shopping
- Rake leaves; help with other yard work
- Walk dog
- Vacuum
- Wash, dry, and put away dishes; fill and empty dishwasher
- Help with parties, meals, etc.

9-10 years old - Children of this age are developing many capabilities. They are also beginning to see that some chores are no longer fun, so they may need reminders.

- Wash car
- Prepare simple meals
- Bathe dog
- Use washer and dryer with directions
- Fold and put away clean clothes and laundry
- Put out trash for garbage collector
- Water yard and plants
- Straighten up rooms and clean up bathroom
- Clean and organize drawers and closets

12 and over - Children of this age want to feel independent. Whenever possible, encourage them to select tasks and choose the time when they will do their chores. Rotate unpleasant tasks. Reinforce the importance of family cooperation.

- Shovel snow and mow lawn
- Iron; do laundry and wash clothes by hand, if necessary
- Wash floors and windows
- Purchase own clothing (allow more independence as child grows)
- Clean refrigerator
- Clean own room thoroughly (dust, vacuum, straighten up, change bed linens, etc.)
- Plan menus; prepare and serve meals
- Babysit for younger siblings
- Clean basement, closets, garage, attic, etc.