THE GREAT BALANCING ACT:

MAINTAINING A WORK/LIFE BALANCE

INSTRUCTOR GUIDE

1-DAY COURSE

HRDQ®

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Instructional Design and Learning Philosophy

We are committed to providing the best core skills content possible for Instructor-Led Training (ILT). The following principles are applied in the development of programs:

Sound Instructional Design

All course content is developed using a variety of research techniques. These include:

- Brainstorming sessions with target audience
- Library research
- Online research
- Customer research (focus groups, surveys, etc.)
- Subject Matter Experts (SME)
- Interviews with trainers

Expert instructional designers create imaginative and innovative solutions for your training needs through the development of powerful instructional elements. These include:

- Learning objectives — effective tools for managing, monitoring and evaluating training
- Meaningfulness — connects the topic to the students' past, present and future
- Appropriate organization of essential ideas — helps students focus on what they need to know in order to learn
- Modeling techniques — demonstrate to students how to act and solve problems
- Active application — the cornerstone to learning — helps students immediately apply what they have learned to a real-life situation
- Consistency — creates consistent instructions and design to help students learn and retain new information
- Accelerated learning techniques — create interactive, hands-on involvement to accommodate different learning styles

Application of Adult Learning Styles

Adults learn best by incorporating their personal experiences with training and by applying what they learn to real-life situations. Our experienced instructional designers incorporate a variety of accelerated learning techniques, role-plays, simulations, discussions and lectures within each course. This ensures that the learning will appeal to all learning styles and will be retained.

Chapter One: The Foundation of Balance

Type of Activity	Segment	Time
	Ice breaker	15
	What is balance?	10
	Self-assessment: Are you out of balance?	5
	Signs of a shaky foundation	10
	Benefits of a balanced approach	5
	Identifying pressure points	25
	Balance management strategies	10
	Activity: Build the foundation of your house	20

Course timing (cont.)

Chapter Two: Systems and Structures That Support Balance

Type of Activity	Segment	Time
	Where does your road lead?	20
	What's in a SMART goal?	20
	Setting priorities	10
	Come alive, take a risk	20
	Delegation: Be in two places at the same time	15
	Create an organizational control center	10
	Minimizing tainted time	10
	Planning for the unexpected	10
	Activity: Building the exterior of your house	20

Reading

Written Exercise

Facilitation

Group Activity

Course timing (cont.)

Chapter Three: Internal Strategies That Support Balance

Type of Activity	Segment	Time
	Understanding perceptions and emotions	20
	Decoding emotions	15
	Analyzing reactions: The RENEW model	20
	Conserve emotional energy	10
	Saying "no" diplomatically	15
	Take a five-minute vacation	15
	Building a support network	10
	Activity: Building the interior of your house	20

Reading

Written Exercise

Facilitation

Group Activity

Contents

Course objectives

Successful completion of this course will increase your knowledge and ability to:

Determine your current state-of-life balance

Understand causes of imbalance

Identify strategies to find work/life balance

Recognize ways to nurture yourself and your job

Conserve emotional energy by insulating and protecting against "drafts"

Identify and create goals that will form your personal foundation

Prioritize the tasks and activities that are most important to meeting your goals

Say "no" and set boundaries diplomatically
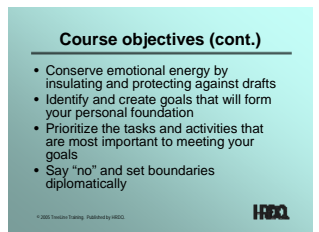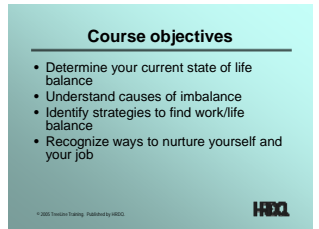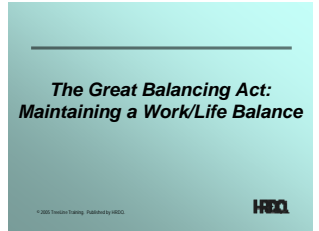
Chapter**One**

THE FOUNDATION OF BALANCE
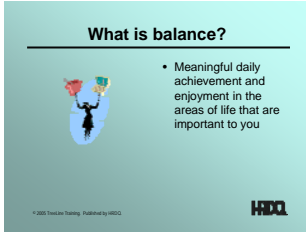
The statistics on this page come from various studies: The National Partnership for Women & Families Family Matters Survey, 1998; E Galinsky, The 1997 National Study of the Changing Workforce, Families and Work Institute; S.J. Heymann, The Widening Gap: Why American Working Families are in Jeopardy and What Can Be Done About It, 2000.In a study of "best companies to work for," those companies rated in the top 100 returned 36% more over ten years than the S&P 500.

Activity: Have participants fill in the blank: "Balance is …" Then have them share their answers with each other. One definition of balance: Meaningful daily achievement and enjoyment in each of four areas of life: Work, family, friends and self. Work/life balance is about effectively managing the juggling act between paid work and the other activities that are important to people. It's not about saying that work is wrong or bad, but that work shouldn't completely crowd out the other things that matter to people such as time with family, participation in community activities, voluntary work, personal development, leisure and recreation. The "right" balance is a very personal thing and will change for each person at different times of his or her life. For some people the issue is being able to get into work or find more work rather than having too much work.

What is balance?

Situation	Percentage
Americans who report that time pressures on working families are getting worse, not better	64%
Working fathers and working mothers who report they don't have enough time with their children	70%
Number of working women reporting they had to cut back their work schedule at least one day out of seven to meet caregiving obligations	24%
Percentage of women who report they have no flexibility in determining the start and end times of their workday	59%
Percentage of men who report they have no flexibility in determining the start and end times of their workday	38%
Percentage of women who reported they "do not have any say" about decisions regarding their work	52%
Percentage of men who reported they "do not have any say" about decisions regarding their work	39%
Percentage of employees who reported feeling overworked often or very often in the past three months	28%
Percentage of employees who reported feeling overworked at least sometimes in the past three months	54%

Balance is _____

_____

_____

2

Are you out of balance?

Instructions: Read each statement and mark it True or False for you.

1. If I'm not accomplishing something with my time, I feel like I'm wasting it.	❑ True	❑ False
2. I can't spend time on myself without feeling guilty that my family or job needs my attention more.	❑ True	❑ False
3. I never feel energized by the activities of my life, only tired.	❑ True	❑ False
4. I have every hour of my week accounted for. I have no time when nothing is scheduled.	❑ True	❑ False
5. I can't remember the last time I felt completely rested, calm and reenergized for the next day's challenges.	❑ True	❑ False
6. Having an unexpected day to myself — free from responsibilities to others — makes me anxious.	❑ True	❑ False
7. I tend to think of myself only in terms of responsibilities to others. I've lost a sense of who I am as an individual.	❑ True	❑ False
8. I feel resentful at times towards my spouse, children or employer because my needs always seem to be last on the list.	❑ True	❑ False
9. I can't remember what I once did for fun.	❑ True	❑ False
10. My typical week leaves me so exhausted that finding a way to have some time to myself only seems like another burden.	❑ True	❑ False

Are you out of balance?

Activity: Allow several minutes for participants to complete the self-assessment. Each "True" response is a red flag that your life is out of balance and you need more personal downtime in your life. Making time for yourself isn't only necessary for your own well-being; it has a direct positive impact on those around you.

Signs of a shaky foundation

Physical

Feel sleepy – even after rest

Often sick

Weight loss/weight gain

Difficulty sleeping through the night

_____

Behavioral

Negative emotions

Withdrawal/isolation

Rejecting help

Declining work performance

Substance abuse

Consistent lack of professionalism

_____

Emotional

Feelings of meaninglessness

Negative

Irritable

Forgetful

Anxious

Resentful

_____

Costs of a shaky foundation

When employees experience imbalance, it is more than just the individual that pays the price. The organization experiences:

Lack	**work environment**
Low	**of results**
Lack of	**turnover**
Unresolved	**mistakes**
Chaotic and negative	**training**
Insufficient	**support**
Frequent	**conflicts**
High	**morale**

Obviously, out-of-balance employees have a negative impact in the workplace.

Activity: Have participants match up the words on the left-hand column with the words on the right-hand column. Answers:

Lack of results

Low morale

Lack of support

Unresolved conflicts

Chaotic and negative work environment

Insufficient training

Frequent mistakes

High turnover

Likewise, employees who feel balanced create positive benefits in the workplace (and for themselves).

Benefits of a balanced approach

Benefits to the organization	Benefits to the individual
Measured increases in individual productivity, accountability and commitment	More value and balance in your daily life
Better teamwork and communication	Better understanding of what your best individual work/life balance is
Improved morale	Increased productivity
Less negative organizational stress	Improved relationships both on and off the job
	Reduced stress

Contributing factors to imbalance: What stresses you out?

Everybody will experience most of these issues at some point in their work careers, but if you are experiencing three or more simultaneously, or experiencing one of them consistently, there is a good chance that you are on your way to feeling the signs of imbalance or burnout.

Working against resistance

Lack of resources

Personal factors

Denial of basic needs, for example breaks, lunches, creativity or privacy

Lack of review, evaluation, feedback or celebration

Lack of clear or realistic goals

Insufficient training

Inability to set boundaries

_____

_____

_____

What stresses you out?

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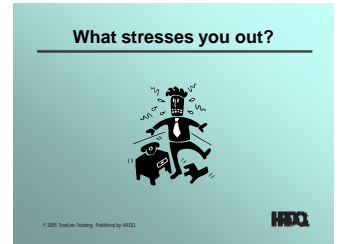
We've listed typical situations that create stress in the workplace, and added space for participants to add some of their own. Have participants share their own thoughts; most likely you will hear "bad boss," poor relationships, conflict, etc. and all sorts of stuff having to do with people.

Identifying pressure points

Write your answers to the following questions on sticky notes and post them under the corresponding chart paper
- The top five things that give you the greatest sense of meaning
- What frustrates you most in your current situation
- Factors that are likely to be difficult now or in the future

Since most imbalance issues stem from too much stress at work, we're going to spend some time analyzing your current work environment, and take steps to minimize or fix its negative effects.

Activity: Have participants answer the questions under Step one and Step two in their workbooks (continues on the next page). Then, post chart paper around the room with the following questions listed at the top of each (one question per page of chart paper): "The top five things that give you the greatest meaning in what you do," "What frustrates you most about your current situation," "Factors that are likely to be difficult now or in the future."

Ask participants to record their answers on sticky notes and place them on the corresponding chart paper. After all have finished, read off all the answers. Note similarities and differences.

Identifying pressure points

Step one:

Write down what attracted you to your current job or profession.

_____

_____

_____

List the things about it that you find fulfilling now.

_____

_____

_____

What do you want to achieve? What do you think is important in doing your job well?

_____

_____

_____

Identify and write down the top five things that give you the greatest sense of meaning in what you do.

_____

_____

_____

Identifying pressure points (cont.)

Step two:

What frustrates you most about your current situation?

_____

_____

_____

List factors that are currently difficult or are likely to be difficult in the future.

_____

_____

_____

Step three:

Look at the list of things that give you a sense of meaning. For each item, look at the list of frustrations and see if any of these things threaten the item. While many of the frustrations on your list may be significant, the ones that interfere with the meaning list are your pressure points.

Things that are meaningful	Frustrations
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____

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The example set by top managers creates a corporate culture that can make or break work/life programs. "A culture can be very subtle," says Joseph Gibbons, a Brooklyn-based consultant in human capital management at FutureWork Institute, a workforce consultancy. "It might be a manager who is permitted to roar at others, but it can also be a feeling of subtle competition in the culture — that 28-year-old who is putting in 60 hours a week and got the promotion. Senior-level modeling of work/life balance may be a key issue here."

There is some indication that employees view long hours as a prerequisite for advancement on the job. In a recent FutureWork Institute survey of almost 6,000 people, "only 9 percent identified themselves as fast-trackers," Gibbons says, "but 29 percent of senior managers identified themselves as fast-trackers, and that tells the whole story. These people are setting the cultural standard."

The relevant questions are: If we increase our investment, what will be the impact on employee behavior in terms of turnover, engagement and commitment to the organization? Then, if we enhance those factors, what will be the customer and bottom-line impact?"

Balance management strategies

Before you implement any formal programs, make certain top management supports them with their words and actions.

Your tool kit

Telecommuting

Flexible scheduling

> Alternate work schedules

> Compressed workweeks

> Paid time-off plans

> Part-time work

> Job-sharing

Sabbatical leave

Extended maternity/paternity leave

Dependent care/elder care

Phased retirement

Concierge services

Managing your program

Involve employees

Communicate your policies

Assess the effectiveness of your programs

> Conduct employee attitude services

> Require exit interviews

Effective balance management strategies	Ineffective balance management strategies
Puts energy into areas that can be controlled	Leaves many things to fate or chance
Prioritizes and plans for the future	Takes on tasks that cannot be completed or creates overwhelming plans for the future
Sets aside time for unexpected events	Leaves things to last minute despite the consequences
Consistently assesses perceptions	Views climate as a threat
Considers alternative strategies	Is set in approach and lets problems accumulate
Finds strategies to actively reduce stress	Reactionary responses to stressful situations
Understands personal needs and takes care of self	Views others' needs as priorities
Seeks help and support	Withdraws and rejects help

Use this page as a summary/springboard for the rest of the program.

Activity: Build the foundation of your house. Have participants get into their groups of four to build the foundation of their house. Remind participants that it would be a good idea to spend a few minutes sketching out what they think their house will look like before they begin (they can use the blank page that follows this one). Begin the house/balance analogy by helping participants see the connection between taking the time to plan their house so it will turn out the way they want it to, and taking the time to plan their lives so they will turn out the way they want.

Allow 20-30 minutes.

Debrief by asking questions like, "What makes a good foundation for a house?" Help participants make a correlation between their house/foundation and creating balance in their own lives. For example, adding strong rebar to your foundation is like having a solid group of people (friends or family) you can count on to support you in your work or life goals. Or providing a strong foundation is like providing a variety of work/life balance options and programs on which to build a balanced workforce.