What it is

A tool for helping lighten one's overall workload

What it can do

This tool can assist you to:

o   Help others deal with work overload

o   Teach others a tool that they can use to maintain a manageable workload

o   Manage your own workload

When to use it

When someone is feeling chronically overwhelmed by the amount of work they face.

How it works

This tool is available online at: stproject.org/resources/tools-for-transformation

Option 1   Fill out the following Load Reduction and Load Rebalancing worksheets. *Read the instructions carefully.*

Option 2   Give others the worksheets with whatever contextual information is appropriate.

Option 3   Use the worksheets in a coaching process. It is very powerful to guide someone verbally through the steps of Load Management.

Additional considerations

o   The key element is the formula itself. Trying to reduce one's load can feel overwhelming.

$$\text{LOAD} = \frac{\textbf{GOALS}}{\textbf{RESOURCES} \times \textbf{TIMEFRAME} \times \textbf{EFFICIENCY}}$$

o   Breaking the challenge down into 4 possible, complementary strategies is very helpful to most people.

o   The same formula can be applied to helping teams or organizations deal with collective overload.

"There is never enough time to do everything,
but there is always enough time to do the most important thing."

– Brian Tracy

Do you feel like you have too much to do?

It may not be your imagination. Many of you reading this simply have too much to do, and it's not going to be solved by better time management. You may actually need to take steps to lighten your load.

Load is the sum total of all that we are responsible for – our commitments to both work and our family, home and community.

This simple but powerful tool is designed to help you reduce your workload.

Step 1 **Review the Load Management Formula:**

$$\text{LOAD} = \frac{\text{GOALS}}{\text{RESOURCES} \times \text{TIMEFRAME} \times \text{EFFICIENCY}}$$

Step 2 **Consider which of the four elements (or which combination of elements) you might adjust to lessen your overall load:**

1. Add resources (other people, support, etc.)
2. Extend timeframes and deadlines
3. Improve efficiency
4. Reduce goals (actually aim to do less)

Step 3 **Review and consider the following strategies.**

STRATEGY 1: ADD RESOURCES

This is one of the most effective ways to create significant load reductions with one action. This might look like:

• Delegating some of your responsibilities to an existing staff person(s)

• Making a new hire to take over some of your responsibilities

• Outsourcing some of your responsibilities

• Hiring or engaging support personnel to assist you

*"I'm going to choose how to spend the day,
rather than having the day choose to spend me."*
Anonymous

STRATEGY 2: EXTEND TIMEFRAMES

This strategy does not always apply, but is always an option to consider. For example:

• Pushing back the date of a major conference or meeting you are planning

• Extending the due date for a project

• Slowing the pace of a project by re-planning the number of months/years it will take

STRATEGY 3: IMPROVE EFFICIENCY

How efficiently do you make use of your time and resources? What opportunities are there to reduce your overall load by becoming more efficient? For example:

• Improve your system for processing and tracking incoming information and requests

• Better time management and prioritization

• Improve use of technology

• Better planning

STRATEGY 4: REDUCE GOALS

We are often reluctant to go here, as there may be disappointment or pain involved – for ourselves and others. We may have to reduce and renegotiate expectations with our boards, our staffs, our members, our clients or customers, or even our loved ones. But when needed load reductions cannot be achieved by other means, we may need to find the courage to scale back what we had planned in the name of actual capacity, sustainability, quality of life, or performance quality.

This might include such moves as:

• Cancelling a planned project

• Ending an existing project

• Exiting boards, committees, coalitions, networks, etc.

> *"One of the symptoms of an approaching nervous breakdown is the belief that one's work is terribly important."*
>
> – Bertrand Russell, mathematician, philosopher, anti-war activist

Load Reduction Worksheet

Step 1   Determine the percent reduction you wish to accomplish in your workload.

- Let this be your most sober, thoughtful assessment.

- Do not set this target merely based on what you think is possible.

- Let this number reflect what you really want for your life!

> **My overall reduction target is _____%.**

Step 2   Determine where this reduction will come from.

- When we think about trying to make significant load reductions, our mind immediately generates lists of reasons of how impossible it will be.

- Challenge yourself with the following exercise:

    o Imagine you have just consulted with a medical doctor, who has diagnosed you with a serious, possibly fatal, case of **leader-itis**.[1]

    o Seriously, play along with this exercise! Imagine you *had* to achieve your percentage load reduction within a year. No choice about it – it has to happen. Now, devote all your creativity to determining *how* you are going to accomplish this.

    o Review the load reduction strategies and determine how you will use some or all of them to achieve your target load reduction.

> **Reduce goals**   _____%
>
> **Add resources**   _____%
>
> **Extend timeframes**   _____%
>
> **Increase efficiency**   _____%

    o Add detail to the plan using the chart on the following page.

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[1] **Leader-itis**: A common disease among leaders. Symptoms include a mistaken belief that you are indispensable, that what you do is terribly important to the future destiny of humanity and the cosmos, a tendency towards complaining about too much to do, withdrawal symptoms when not checking emails & text messages, and concern from your loved ones for your physical, emotional, and mental well-being.

Load Reduction Plan

Sketch out broad plans for how you will utilize some or all of the 4 Load Reduction Strategies to achieve your Target Load Reduction of _____%. **REMEMBER**: the percentages from the 4 Strategies should equal your total Target Load Reduction.

STRATEGY 1: ADD RESOURCES

I will reduce my load _____% by delegating, hiring or outsourcing the following:

STRATEGY 2: EXTEND TIMEFRAMES

I will reduce my load _____% by pushing back the following dates and deadlines, and/or slowing the pace of these projects:

STRATEGY 3: IMPROVE EFFICIENCY

I will reduce my load _____% by the following specific improvements in efficiency:

STRATEGY 4: REDUCE GOALS

I will reduce my load _____% by eliminating the following work:

LOAD REBALANCING PLAN

In addition to (or instead of) reducing your overall load, you may wish to look at rebalancing your mix of activities. Perhaps you can find ways to lessen or eliminate some aspects of your work that doesn't play to your strengths, that you find more draining than other aspects of your work, or that you simply don't like. And maybe you can shift your roles and work to spend more time engaged with activities that you find meaningful or joyful.

Activities I want to significantly reduce.

Activity #1_____

How I will accomplish this:

Activity #2_____

How I will accomplish this:

Activity #3_____

How I will accomplish this:

Activities I want to significantly increase.

Activity #1_____

How I will accomplish this:

Activity #2_____

How I will accomplish this:

Activity #3_____

How I will accomplish this: