



**Manage Your
Time and Energy:
A Path to Personal
Sustainability**

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LEARNING OBJECTIVES

- **Increased self-awareness** about how you are spending your time currently and identifying the factors that are hindering personal sustainability.
- **Understanding energy management:** the four core energy needs: physical, emotional, mental and spiritual and their connection to personal sustainability.
- **Understanding time management** and its role in supporting Energy Management: Learn strategies and tactics for better personal organization.
- With input from peers, **identify a plan** with a set of personal practices to help sustain you in your work.

PART ONE: SELF DISCOVERY

Name 1 to 3 of your time management challenges.

Be very specific about the challenge and clearly identify *why* it's a challenge; what is the negative impact that this challenge is having on *you* (not on others).

An ambient angst pervades our society—there's a sense that somehow there's probably something we should be doing that we're not, which creates a tension for which there is no resolution from which there is no rest.
--David Allen

1. _____

Negative impact on me: _____

2. _____

Negative impact on me: _____

3. _____

Negative impact on me: _____

Decoding Cultural Messages

In Pairs: Switch notebooks with a partner and interview them using these questions. Write their responses in their notebook so they have their notes for later.

1. What does productive mean to you?

2. How did your family/those you grew up with talk about time?

3. When you are self-critical for “bad” time management, what is the specific issue?

4. What does “good” time management mean to you?

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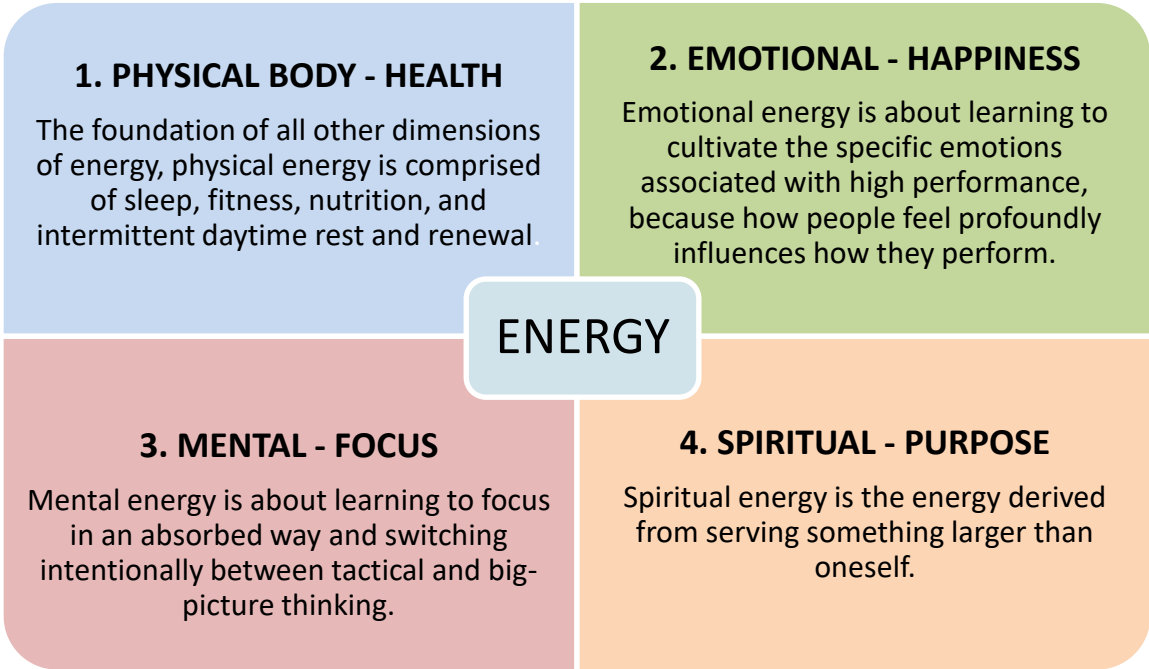
5. Think of a time you had a good time management week or month. What made it so?

6. What did you specifically do that contributed to having a good time management experience?

PART TWO: ENERGY MANAGEMENT

Definition:

Energy management is the capacity to work; it comes from four main wellsprings in human beings: the physical body, emotions, mind, and spirit. Energy diminishes from over OR under use.



To Build Capacity-Push Limits

“We're at our best when we move between expending energy and intermittently renewing our four core energy needs: physical, emotional, mental, and spiritual. When you're intent on supplying fuel in each dimension of energy, you're creating happier people that will affect your organization's success.”

From The Energy Project

Energy Self-Reflection

Mark (X) the statements below that are true for you.

BODY	
	I don't regularly get at least seven to eight hours of sleep, and I often wake up feeling tired.
	I frequently skip breakfast, or I settle for something that isn't nutritious.
	I don't work out enough (meaning cardiovascular training at least three times a week and strength training at least once a week).
	I don't take regular breaks during the day to truly renew and recharge, or I often eat lunch at my desk, if I eat it at all.
EMOTIONS	
	I frequently find myself feeling irritable, impatient, or anxious at work, especially when work is demanding.
	I don't have enough time with my family and loved ones, and when I'm with them, I'm not always really with them.
	I have too little time for the activities that I most deeply enjoy.
	I don't stop frequently enough to express my appreciation to others or to savor my accomplishments and blessings.
MIND	
	I have difficulty focusing on one thing at a time, and I am easily distracted during the day, especially by e-mail.
	I spend much of my day reacting to immediate crises and demands rather than focusing on activities with longer-term value and high leverage.
	I don't take enough time for reflection, strategizing, and creative thinking.
	I work in the evenings or on weekends, and I almost never take an e-mail-free vacation.
SPIRITUAL	
	I don't spend enough time at work doing what I do best and enjoy most.
	There are significant gaps between what I say is most important to me in my life and how I actually allocate my time and energy.
	My decisions at work are more often influenced by external demands than by a strong, clear sense of my own purpose.
	I don't invest enough time and energy in making a positive difference to others or to the world.

SCORING	
How is your overall energy?	Total number of statements checked:
<i>Guide to scores:</i>	<i>0–3: Excellent energy management skills</i> <i>4–6: Reasonable energy management skills</i> <i>7–10: Significant energy management deficits</i> <i>11–16: A full-fledged energy management crisis</i>
WHAT DO YOU NEED TO WORK ON?	
Number of checks in each category:	Body:
	Emotion:
	Mind:
	Spirit:
<i>Guide to scores:</i>	<i>0: Excellent energy management skills</i> <i>1: Strong energy management skills</i> <i>2: Significant deficits</i> <i>3: Poor energy management skills</i> <i>4: A full-fledged energy crisis</i>

My Priority Energy Area(s):

KEY IDEAS

1. Mind and Body Are One

Full engagement relies on drawing on four separate but related sources of energy:

Balancing stress and recovery is critical not just in competitive sports, but also in managing energy in all facets of our lives. When we expend energy, we draw down our reservoir. When we recover energy, we fill it back up. Too much energy expenditure without sufficient recovery eventually leads to burnout and breakdown.

The Power of Full Engagement

PHYSICAL CAPACITY	EMOTIONAL CAPACITY	MENTAL CAPACITY	SPIRITUAL CAPACITY
Strength Endurance Flexibility Resilience	Emotional flexibility is the ability to move freely and flexibly along wide spectrum of emotions, not responding rigidly or defensively. Emotional resilience is the capacity to bounce back after experiences of disappointment, frustration, loss.	Mental endurance is the ability to sustain focus and concertation over time. Mental flexibility is the capacity to move between the rational and intuitive and to embrace multiple points of view.	Spiritual endurance is the commitment to one's deeply held values, even when it involves sacrifice. Spiritual flexibility is the tolerance and respect for values and beliefs that are different.

Most people “underspend” on Physical and Spiritual and “overspend” on Emotional and Mental

2. Power of Renewal: Think Like a Violinist

“Unlike machines, human beings are designed to pulse regularly between spending and renewing energy. While machines can run on one source of energy, people have four core energy needs: physical, emotional, mental, and spiritual.” -- Tony Schwartz, *The Energy Project*



You get more accomplished by working intensely for short periods and then refueling than you do by working continuously over a long period of time. None of us can operate continuously at peak levels for very long.

Tips:

- ✓ Do your most challenging and important work as soon as possible after you wake up, when you have the most energy. (If your highest energy is in the evenings, and you have flexibility, save your hardest work for then.)
- ✓ Focus in the most absorbed way possible when you are working and then take a break at least every 90 minutes to refuel your energy reservoir. Any activity — like deep breathing, reading a novel, talking with a friend or taking a run — can be effective. The key is choosing something you find restorative.
- ✓ Always have lunch, preferably away from your desk.
- ✓ If you can, take a nap no longer than 20 to 30 minutes between 1 and 4 p.m. It will give you a surge of energy — and potential productivity — for the rest of the afternoon. If a nap isn't possible, simply closing your eyes for a few minutes can still be a source of modest renewal.

The Rhythm of Great Performance

(Excerpted from *Life@Work* by Tony Schwartz, 2/27/15)

Among a dozen feelings including “happy,” “competent,” “hassled” and “worried,” “fatigued” was far and away the one most strongly correlated to specific times of day.

Interestingly, most respondents in the study experienced the highest level of negative emotions in the mornings, but also the most energy and the greatest feelings of competence. Energy and competence peaked around noon, and then both declined steadily until bedtime.

In short, the longer subjects were awake, the more fatigued they became and the more incompetent they felt.

But there is an antidote to fatigue and its impact on competence. Not surprisingly, it's rest. Among 16 potential daily activities — including eating, praying, relaxing and exercising — napping had far and away the biggest impact on reducing fatigue.

3. Tactical Mode vs. Creative Mode



We need to be able to move freely and flexibly between two modes of thinking *Tactical* mode and *Creative* mode. Tactical mode is to analyze, simplify and categorize. The creative process is the capacity to see more broadly (the big picture) the parts and the whole. Tactical mode is where we were trained in formal education it is where we spend most of our time at work and we have come to believe that it is the most productive time. However, tactical mode stifles creativity.

Tips:

✓ **Tactical Mode**

When you are working towards and explicitly defined goal. This is where you process the known and come to clear conclusions. This is a good time to be at your desk or on your computer. Often requires highly focused uninterrupted time.

✓ **Creative Mode**

Big picture mode relies on imagination and intuition. The mode that is comfortable with uncertainty, paradox and ambiguity. Where we tend to have insights. Creativity happens when our minds are left to wander; walking, listening to music, exercising, or day dreaming. Requires spaciousness!

4. Positive Energy Rituals

Highly specific routines for managing energy are the key to full engagement and sustained high performance.

We care for others. We care deeply about our causes, for our vision, values and mission. We care about our work, our impact, and how power and resources are used and allocated for the most vulnerable and powerless. We choose to have impact because we care.

Self-care is not about self-indulgence. It's about self-preservation.

-- Audre Lorde

The habits of social justice—and indeed, of contemporary living—to abandon, deny, or repress self-needs in sacrifice to the collective mission only serve to deny movements of their most important resource—the “people part” of people power. It is counter to our principles to treat people as replaceable parts, and yet we willingly work as if they are.

Self-care is foundation to our power, our resilience, our creativity, our health, and our collective impact.

The phrase “self-care” sets up a paradigm of selfishness that must be broken in order for people to actually practice self-care. You cannot care for others if you have not cared for yourself. There is a difference between self and selfish. Selfish is caring for yourself *at the expense of others*.

A Note about Habits and Practices

Habit: A recurrent, often unconscious, pattern of behavior that is acquired through frequent repetition. Habit is a pattern of activity, behavior or thoughts triggered by a specific stimulus.

Habits are things we do unconsciously. Habits are automatic.

Practice: A repetitive internally driven *action, behavior or thought initiated by a conscious, intentional decision*, practiced for explicit benefit, improved over time (gets better and better with lots of practice);

HOW TO PRACTICE:

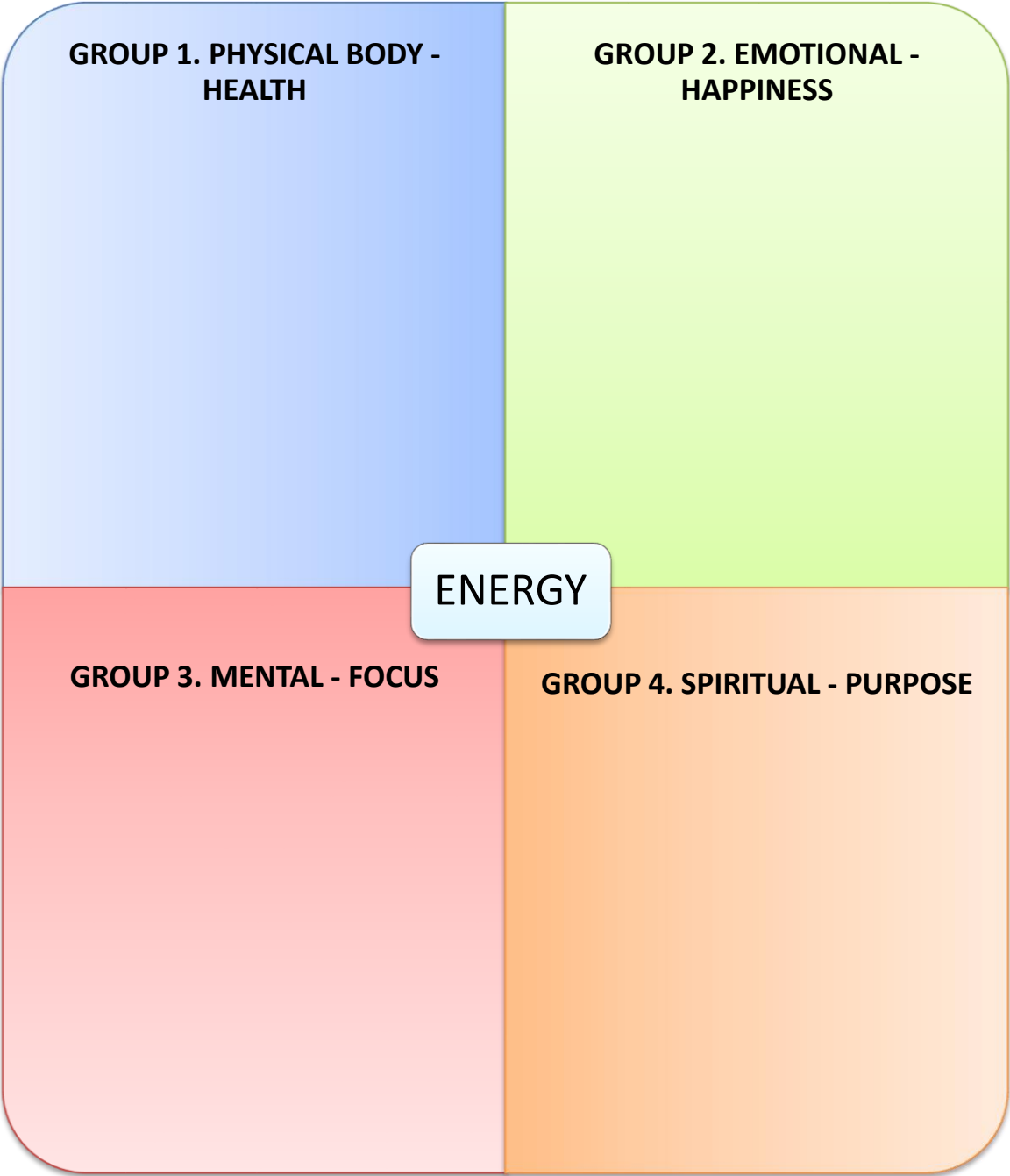
1. SHOW UP CONSISTENTLY, AND
2. DO THE *RIGHT* WORK

“We are wired for habits because we have a high need for certainty. Habits provide consistency and certainty. The problem is that we don’t always develop productive and healthy habits. Often our habits are unproductive or even harmful to us. If you think you’re building a habit when you’re really developing a practice, you will eventually reach a point where you feel frustrated that things aren’t “locking in”-

-- Renee Fishman, <http://mymeadowreport.com/>

GROUP EXERCISE

- 1. Choose the core energy that you have prioritized for action and go to that “quadrant”
- 2. With the group, brainstorm a list of tactics and practices to build capacity in that area.
- 3. Group gallery walk and debrief.



LUNCHTIME CHALLENGE

1. You have 1 hour for lunch
2. Spend no more than 8 minutes on your phone/laptop
3. Eat for 30 minutes (do not combine eating time with phone time)
4. Walk for 20 minutes (do not combine walking time with phone time)

**A COMFORT
ZONE IS A
BEAUTIFUL
PLACE BUT
NOTHING EVER
GROWS THERE**



...PRACTICE IT TAKES

PART THREE: TIME MANAGEMENT

Definition:

Time management is the process of organizing and planning how much time you spend on specific activities.



Time Management Self-Reflection

	Strongly Disagree	Disagree	Agree	Strongly Agree
I have conflicting priorities.	1	2	3	4
I'm afraid that I'm not paying enough attention to really important things.	1	2	3	4
I feel like I am not spending my time on the right things.	1	2	3	4
I am overcommitted.	1	2	3	4
I don't have clear, well-defined goals.	1	2	3	4
I feel like things are falling through the cracks.	1	2	3	4
I don't keep up with my workload.	1	2	3	4
I have too many things on my mind.	1	2	3	4
I'm not in control of my calendar.	1	2	3	4
I don't have a good way to track all of my things to do.	1	2	3	4
I have a hard time finding things when I need them.	1	2	3	4
My email is out of control and not well managed.	1	2	3	4

Mark the statements that you circled agree or strongly agree AND which cause you the most anxiety.

KEY IDEAS

1. Mind Like Water

“Your mind is a great place to have ideas, but a terrible place to store them. “

--David Allen, Getting Things Done

“A metaphor from the martial arts to convey the idea of a mind that is highly focused in the here and now, yet flexible enough to deal with the bigger strategic picture, reflect on the higher issues that we consider truly meaningful, and therefore keep our actions consistent with core values and crucial goals.



Imagine throwing a pebble into a still pond. How does the water respond? The answer is, totally appropriately to the force and mass of the input; then it returns to calm. It doesn't overreact or underreact.”

2. Managing Actions

- ✓ You don't manage time and wind up with more – **Everyone has the same amount!**
- ✓ You don't manage information overload. **You make choices about what to focus on.**
- ✓ You don't manage priorities, you *have* them. **You make choices about what to do next!**

4 STEP PROCESS

The key to managing all your “stuff” is managing your *actions*. Follow this 4 part system. Do NOT do these steps at the same time!

Step 1. Capture

Inventory all the “open loops” which are the things that are not resolved and are tugging at our attention, causing stress, distraction, anxiety or worry. When you are capturing, do NOT process. Just get the items out of your mind and into your system.

Go to the Capture Sheet and list all your open loops:

- Commitments
- Errands/chores
- People to respond to
- Projects to be completed or started
- Ideas

Step 2. Process

Process does NOT mean spend time on. It means sorting the list to determine what category of item so you know how to take action on the. Here are the choices:

One set of items can be dealt with right now:

- ✓ If it will take 2 minutes or less, do it now and be done with it.
- ✓ Is this really for someone else to take action on? Forward it to them.
- ✓ Trash
- ✓ Reference file/folder

This other set of items will be processed using these TAGS.

- ✓ **NEXT ACTION:** clearly defined, tangible visible action (we’ll return to this in step 3)
- ✓ If there is NO clear next action, put it in one of these places:
 - **SOMEDAY/MAYBE:** Ideas that might turn into actions or projects, but you’re not sure yet. And, you don’t want to lose them, so you tag them as such.
 - **WAITING** for someone else to take action so that you can take yours.
- ✓ **CALENDAR:** If there is a set/specific time that it needs to happen, add it to your calendar. Reserve calendar tags for items that have a set appointment or deadline, not an arbitrary date that you hope to complete it by.

✓ **PROJECT:** Projects are comprised of many next actions. Be sure that your projects list has clearly defined outcomes that are stated in the past tense (what finished looks like). When you process a project, take a moment to identify the next items within that project. Examples:

✓ Workshop delivered

- Schedule date and location
- Create workshop announcement
- Add to website
- Develop facilitator agenda
- Create materials
- Create PPT
- Create evaluation sheet
- Send staff person the set-up and supply needs
- Deliver workshop

Almost every project could be done better, and an infinite quantity of information is now available that could make that happen.

-- David Allen

✓ Conference attended

✓ Meeting completed

✓ Proposal written

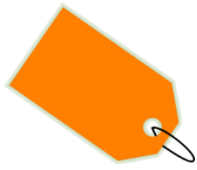
✓ Program designed

✓ Cabinets organized

✓ House clean

✓ Vacation planned

Go back to your list on the prior page and sort the capture items using these TAGS:



- **Next Action**
- **Project**
- **Someday/Maybe**
- **Calendar for Specific Time**
- **Waiting for Someone**

Step 3. Next Action Processing


The key to stress free time management is trusting that you have captured all the actions that need to get done, and you're mind knows that you can adhere to your system. This is where you decide WHEN to take action on all of your items that are tagged Next Action. This is **GTD: Get Things Done**

Go back to the list again, and for each **NEXT ACTION**, indicate when you want to take action:



- **Today:** You will do this action today.
- **Upcoming:** You will do this action with 5-7 days
- **Later:** You will do this action any time after 1 week from now.

Step 4. The Review

CAPTURE ONGOING 		
DAILY REVIEW 5-10 minutes/day	WEEKLY REVIEW 15 minutes/week	MONTHLY REVIEW 30 minutes a month
<p>Every morning and/or evening conduct a review:</p> <ol style="list-style-type: none"> 1. PROCESS new items that have accumulated in your capture. Now, your capture should be cleared out. 2. REVIEW items in UPCOMING and move items as needed. 3. Are there items left over from yesterday that were marked TODAY but you didn't get to? Review them and decide if they remain TODAY, or if you want to move them. 4. Get to work on all items marked TODAY. 	<p>Every week (e.g. Friday mornings) conduct a review:</p> <ol style="list-style-type: none"> 1. Do the DAILY REVIEW, <u>plus</u>: 2. Review WAITING and decide if a follow-up or reminder is needed, if so, add that action. 3. Review all the actions marked LATER and move items as needed. 4. Get to work on all items marked TODAY. 	<p>Every month (e.g. last Friday of the month) conduct a review:</p> <ol style="list-style-type: none"> 1. Do the DAILY AND WEEKLY, <u>plus</u>: 2. Review SOMEDAY / MAYBE for any new next actions. 3. Review PROJECTS for any new next actions, add action items as needed. 4. Get to work on all items marked TODAY.

- ✓ Make sure that your system is with you at all times so you can capture as soon as you note an "open loop" so that you can eliminate the distraction.
- ✓ You must trust that this evening or tomorrow morning you'll process that "stuff" into today, upcoming, or later.

YOUR SYSTEM

You'll need to decide on a system. It must be something that your mind will trust.

If your default mode is virtual, consider:

- ✓ Planner software
- ✓ Phone App (e.g. Asana, Trello, Wunderlist, etc.)
- ✓ Excel spreadsheet – in particular a google doc that you can access from multiple devices.

If your default mode is not virtual or if you are not sure, start with a simple notebook or paper planner.

MUST HAVE LISTS

No matter which system, it should have these separate lists:

1. CAPTURE

Brain dump of items not yet processed

2. NEXT ACTION – THREE SEPARATE LISTS:

TODAY

UPCOMING

LATER

3. PROJECTS

Clearly defined outcomes that are stated in the past tense.

4. SOMEDAY / MAYBE

Items for review that are potential actions at a later date.

5. WAITING

Items that are pending action from someone else.

OPTIONS: Get Started with a Paper Notebook or Excel

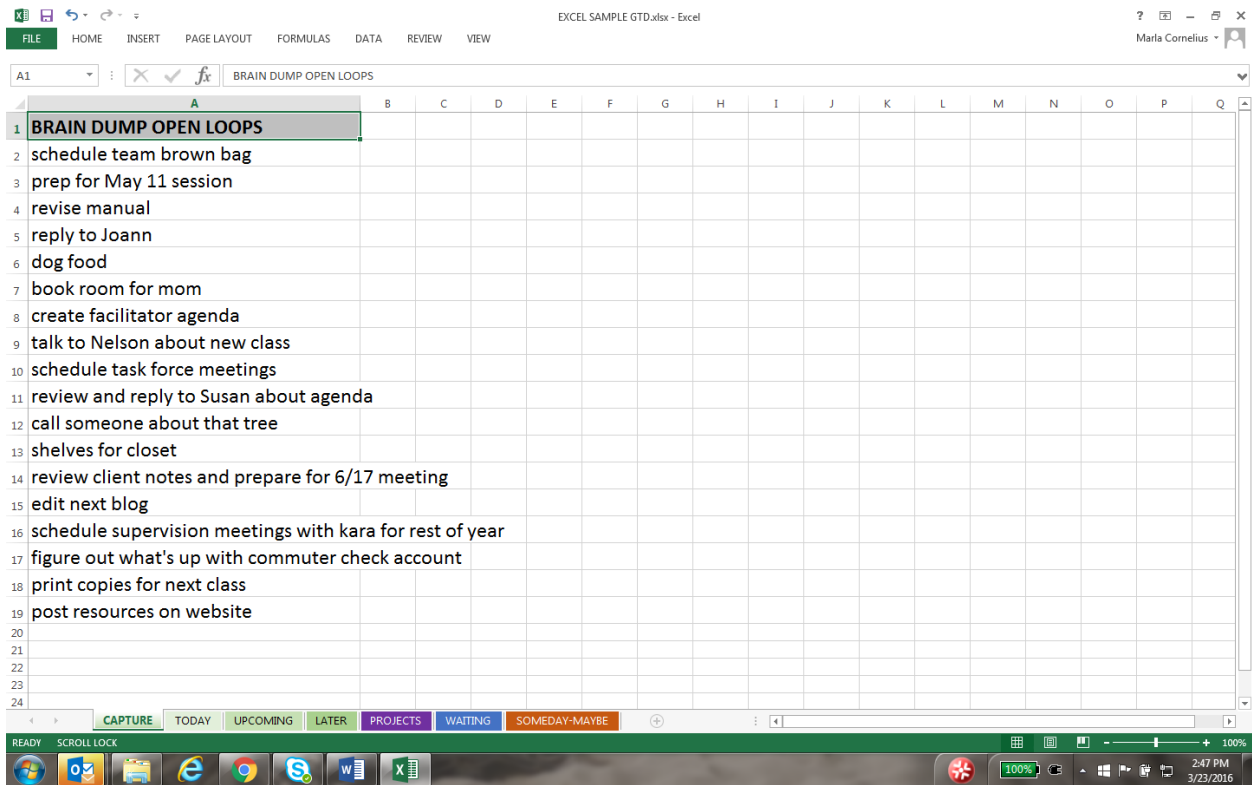


ACTION TABS:

TAB 1	CAPTURE
TAB 2	TODAY
TAB 3	UPCOMING
TAB 4	LATER

PROCESS TABS

TAB 5	PROJECTS
TAB 6	WAITING
TAB 7	SOMEDAY/MAYBE



PART FOUR: ACTION PLANNING

ENERGY MANAGEMENT		
Area	Goal	Strategy: Practice/Ritual
<i>Example: Body</i>	<i>Increase stamina</i>	<i>Walk 3 miles 3-4 times a week Nap 15 minutes daily in office/car/park</i>
<i>Example: Emotional</i>	<i>Increase resilience and connection</i>	<i>Create appreciations rituals for team Schedule lunches 1x month with team members</i>

TIME MANAGEMENT

Goal	Strategy: Practice/Ritual
<i>Example: Reduce overwhelm Example: Increase feelings of control</i>	<i>Create capture log Institute the daily/weekly/monthly reviews.</i>

RESOURCES

Books

Getting Things Done: The Art of Stress-free Productivity by David Allen

See also his website: www.gettingthingsdone.com

The Power of Full Engagement: Managing Energy, Not Time, Is the Key to High Performance and Personal Renewal by Jim Loehr and Tony Schwartz

See also their website: www.theenergyproject.com

Articles

Manage Your Energy, Not Your Time by Tony Schwartz and Catherine McCarthy

www.hbr.org/2007/10/manage-your-energy-not-your-time

Blogs on Wellness by Beth Kanter

www.bethkanter.org/wellness/

- The Secret Every Successful Nonprofit Leader Knows About Being Productive
- Does Your Nonprofit Have A Wellness Strategy for Staff? -

Nobody Cares How Hard You Work by Oliver Burkeman

www.99u.com/articles/51908/nobody-cares-how-hard-you-work

No Time to Think by Kate Murphy

www.nytimes.com/2014/07/27/sunday-review/no-time-to-think.html?_r=2

What is Time Management?

www.mindtools.com/pages/article/newHTE_00.htm

Optional Exercise: Project Planning

List three projects from your list above. Think of personal as well as professional projects that fit in this category.

Let your partner coach or act as your consultant to come up with the first 3 steps. Steps should take no more than 30 minutes. Make sure Step 1 is really the first step!

Important Project #1 _____

Step 1:

Step 2:

Step 3:

Important Project #2 _____

Step 1:

Step 2:

Step 3:

Important Project #3 _____

Step 1:

Step 2:

Step 3:

THANK YOU

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As Director of Operations and Miscellaneous Stuff at Sustainable Economies Law Center, Sue ensures the organization's office space and internal operations contribute to the wellbeing of staff, and the effectiveness of Sustainable Economies Law Center's programs.