The Practical Leader

Improving the Schools of Today

Inventing the Schools of Tomorrow

RESEARCH INTO PRACTICE

Balancing Personal and Professional Responsibilities

In A Nutshell

Finding the balance between personal and professional responsibilities is a struggle for many people but especially for school leaders. Principals find balance to be a struggle because of the complexity of their job, the extended school day, and the expectations from both senior leadership in their district and from families and community (Whitaker, 1996). The idea that school leaders are available any time, any day of the week adds additional stress (Presser, 2005). While the importance of work-life balance is well documented, there is no single strategy or approach that works for everyone.

Summary of Findings

Principals have incredibly complex jobs and a schedule that routinely extends beyond a regular school day. Adding to the complexity, the schedule is often dictated by other people and unexpected events. These factors are related to principal burnout and increased conflict in a principal's personal life (Whitaker, 1996).

Decades ago work-life balance was seen as a women's problem (Hall & Richter, 1989) but that is no longer the case. Millennial employees, born between 1980 and 1995, are more attentive to the importance of work-life balance than prior generations and cite the lack of balance as a reason to leave their position or not seek advancement (PricewaterhouseCoopers, 2013). Technology adds to the stress and makes it harder to maintain boundaries between personal and professional lives. The concept of the 24/7 workplace, and 24/7 accessibility, adds greater stress on leaders and those they care about (Presser, 2005).

A study of over 44,000 employees across the United States found that all employees want greater flexibility in their schedule and greater ability to balance personal and professional responsibilities (PriceWaterhouseCoopers, 2013). Studies specifically about school principals found a similar pattern but noted that many principals, particularly those in smaller schools or where there is no assistant, struggled most with maintaining balance (Eckman, 2004; Hausman, et.al, 2001; Pounder & Merrill, 2001; Whitaker, 1996)

The Importance of Balance

Work-life balance doesn't necessarily mean there is an equal division between the two. Individual interests, goals, obligations and commitments mean that the balance is more fluid and shifts over time. But the evidence is clear that work-life balance positively impacts individuals as well as the organizations where they work. Here's a summary of the benefits (University of Buffalo, n.d.).

Benefits for the Individual	Benefits for the Organization
• Work-life balance contributes to a healthier life. • Stress is reduced when there is balance. • Relationships improve both on the job and away from the job. • Work, as well as personal life, is more satisfying.	• There is increased productivity and commitment at work. • Teamwork and communication is improved. • Overall organizational stress is reduced. • The collective morale improves.

Seeking Balance

Almost everyone recognizes the importance of work-life balance. The issue for most is how to create the balance. Unfortunately, the literature has not found a single set of strategies that works for every individual. But fortunately, the literature does provides a comprehensive set of tools and strategies that individuals can consider as they seek the balance appropriate for them.

Understand Yourself

In order to achieve work-life balance you need to think about yourself, your patterns, and your aspirations. Values and beliefs shape our actions and impact our personal set of life experiences. Here are some suggestions for understanding yourself.

- *Define what "greater balance" means for you*. What would it look like if it was achieved? Who else should be part of the conversation about work-life balance? (Chakravarty, 2011)
- *Think about what you value*. Being clear about your values is one key to establishing balance, or at least understanding why you don't have balance. A conflict in values can create stress and disrupt the balance we seek. For example, you may value getting to work early but also value spending a little time with your spouse, children or significant other before your day begins. Perhaps you value finishing your work before you leave for the day, but also value attending your children's after-school activities or being available to help with childcare or household chores.(Graham, 2002)
- *Identify your patterns*. Think about how you organize your day. What things always get accomplished and what things deferred? What choices do you make about sleep, diet and exercise? Do you schedule breakfast meetings or do you reserve that time for transitioning from personal time to work? (Graham, 2002)
- *Understand your natural work day rhythms*. People have their own natural rhythms. Identify your rhythms and patterns during the day. Some people prefer an unstructured start to the day, others prefer to jump right into their work. Figure out your rhythms and structure your work around those natural patterns. Pay attention to your patterns over the day (see Research Brief on Decision-Making Fatigue) assuring adequate breaks and time to rejuvenate. (Chakravarty, 2011; Uscher, 2011)

Set Realistic Goals and Expectations

Finding work-life balance is about setting priorities and managing time (Graham, 2002; Uscher, 2011). Our perceptions, attitudes and assumptions often shape the expectations we have for ourselves. Here are some suggestions for setting realistic goals.

- *Check out assumptions about your work*. Talk with your supervisor about priorities and balance. Help your supervisor understand the right balance for your life and how that balance can be achieved. We often set our unrealistic standards for our own performance. Good supervisors know the importance of work-life balance and how a lack of balance can negatively impact an individual's work and the health of the entire organization. (Chakravarty, 2011; Hall & Richter, 1989)
- *Talk with your family or significant other* about priorities and schedules. Much of the stress about work-life balance is a result of tension with those we care about the most. Talking about the issues and being open to finding solutions helps lessen the stress. (Graham, 2002)
- *Include time for yourself* and your own personal interests among your goals. Be sure to allow time for adequate sleep and exercise. (Mayo Clinic, 2012)

Managing Work-Life Balance
Even with realistic goals and an understanding of your own values, managing work-life balance can be a challenge. Here's advice from others about work-life balance.

- *Build time for yourself into your schedule*. When you plan your week include time for exercise, for hobbies or activities, for family and friends. Actually add it to the schedule just like any other professional commitment. Most importantly "be proactive about scheduling" (Stack, 2010). When leaders don't take care of themselves and recognize the need for balance it negatively impacts the whole organization. (Mayo Clinic, 2012)
- *Make boundaries clear*. Negotiate, and legitimize, boundaries between work and your personal life. Be really clear about when you are available for work activities and the time your preserve for family and personal time. Take control of your day and week. There may be times during the day when your door is closed and you're working on projects, other times when you are available. The same is true for your personal and family time. Give yourself permission to delay responding to texts or email (Chakravarty, 2011)
- *Identify a mentor, coach or friend with whom you can talk*. Being a leader, particularly in a small school can be an isolated job. There's evidence that leaders need someone with whom they can talk, and share problems, including frustrations about work-life balance. The person must be someone you trust and there is some evidence that a person outside of education, who doesn't share the same expectations, can be the best listener. (Lord, Atkinson & Mitchell, 2008)
- *Pay attention to sleep, exercise and diet*. Busy people often neglect sleep, exercise and may not eat regularly, or make unhealthy choices about what they eat. Be attentive to the need for adequate sleep, and build time for exercise, even a walk around the outside of the school, into your schedule. Don't grab lunch "on the run" or eat while working on other things. Instead take short mental breaks, eat a healthy snack and drink plenty of water (Mayo Clinic, 2012; Uscher, 2011).
- *Talk with your partner*. The quality of your personal relationships impacts everyone around you. Talk openly with your partner about work-life balance, about priorities, about scheduling, and about how to support one another. (Graham, 2002)
- *Stop doing some things*. Analyze your schedule and your activities. Identify things that you don't need to do, or don't need to do as frequently. Give yourself permission to drop them from your routine. (Anderson, 2013; Mayo Clinic, 2012)
- *Delegate and/or divide work*. Often a leader thinks they must do everything or respond to every request. They often worry about losing control. There are often others in your school who can do some of the work. Some people enjoy the opportunity to learn a new task or perhaps they aspire to being a school leader and want some experience with leadership tasks. Become comfortable delegating tasks or subdividing the work among several people. (Anderson, 2013; Mayo Clinic, 2012)

Communicate, Communicate, Communicate
While planning is helpful to work-life balance, even more helpful is communication with your supervisor and with your spouse or significant other. In the absence of communication others are left to form their own opinions and make their own judgments. Here are some other communication tips from the University of Maine (Graham, 2002).

- Hold family meetings to talk about schedules and priorities.
- Keep both weekly and monthly schedules that include time for your priorities including exercise, family activities and personal interests.
- Be willing to revise your plans when there are conflicts or change is needed.
- Understand what you can control and what you can't.
- Keep a sense of humor.
- Remember that effective work-life balance is not a static event, developed one time, but a process that evolves and changes over time.

Summary

Finding work-life balance is a personal journey. It's important to understand yourself, your own values and goals, your own need for boundaries and balance, and your tolerance for the negative consequences of failing to seek balance.

Online Resources

Study of Millennial Workers – PriceWaterhouseCoopers (2013)
http://tinyurl.com/lxy9vpl
This article describes the millennial worker, often called Generation Y, and their needs for work-life balance.

Balancing Work and Family – J. Graham (2002)
http://umaine.edu/publications/4186e/
This helpful bulletin from the University of Maine Extension Service discusses a set of strategies for addressing work-life balance.

Work-Life Balance: Tips to Reclaim Control – Mayo Clinic Staff (2012)
http://www.mayoclinic.org/work-life-balance/art-20048134
These tips from the Mayo Clinic can guide decisions about work-life balance.

5 Tips for Better Work-Life Balance – J. Uscher (2011)
http://www.webmd.com/health-insurance/protect-health-13/balance-life
This article from webMD discusses specific strategies for achieving work-life balance.

Time Management: Tips to Reduce Stress and Improve Productivity
Mayo Clinic Staff (2012)
http://aasa.org/SchoolAdministratorArticle.aspx?id=10668
This article offers twelve tips for improving productivity and addressing work-life balance.

Balancing Your Professional and Personal Life
http://www.asid.org/content/balancing-your-professional-and-personal-life
This article from the American Society of Interior Designers provides a technique for prioritizing tasks.

Balancing Life and Personal Commitments
http://tinyurl.com/ly4z8rt
This brochure from the University of Buffalo discusses the benefits of work-life balance for both the employer and the employee.

Work-Life Balance: 5 Ways to Turn It From the Ultimate Oxymoron Into a Real Plan – A. Anderson (2013)
https://tinyurl.com/n73pw3b
This article from Forbes magazine offers five ideas for dealing with work-life balance.

Mentoring and Coaching for Professionals: A Study of the Research Evidence – P. Lord, M. Atkinso, H. Mitchell (2008)
https://www.nfer.ac.uk/nfer/publications/MCM01/MCM01.pdf
This report from the National Foundation for Educational Research reports on the value of mentoring and coaching for professionals like school principals.

Working Out a Balance – D. Chakravarty (2011)
https://tinyurl.com/ncxw5s8
This *Business Today* article offers tips that can be immediately used to improve work-life balance.

RESEARCH INTO PRACTICE

Lost Luster: Redesigning the Principalship – D. Pounder & R. Merrill (2001).
http://aasa.org/SchoolAdministratorArticle.aspx?id=10668
This article talks about the impact of work-life balance on the pool of applicants seeking positions as school leaders.

Other Research Briefs
Two other Research Briefs prepared for Oregon GEAR UP principals address related issues. They include time management strategies and decision fatigue.

Time Management - http://gearup.ous.edu/sites/default/files/Research-Briefs/researchbrieftimemanagement.pdf

Decision-Making Fatigue - http://gearup.ous.edu/sites/default/files/Research-Briefs/ResearchBriefDecisionFatigue.pdf

Print Resources

Brooks, R. & Goldstein, S. (2004). *The Power of Resilience: Achieving Balance, Confidence, and Personal Strength in Your Life*. New York: McGraw-Hill.

Presser, H. (2005). *Working in a 24/7 Economy: Challenges for American Families*. New York: Russell Sage Foundation.

Stack, L. (2010). *Super Competent: The Six Ways to Perform at Your Productive Best*. Hoboken, NJ: John Wiley & Sons.

References

Eckman, E. (2004). Similarities and Differences in Role Conflict, Role Commitment, and Job Satisfaction for Female and Male High School Principals. Educational *Administration Quarterly, 40*(3), 366-387.

Hall, D. & Richter, J. (1989), Balancing Work Life and Home Life: What Can Organizations Do to Help? *The Academy of Management Executive, 2*(3), 213-223.

Hausman, C., Nebeker, A., McCreary, J. & Donaldson, G. (2001). The Worklife of the Assistant Principal. *Journal of Educational Administration, 40*(2), 136-157.

Whitaker, K. (1996). Exploring Causes of Principal Burnout. *Journal of Educational Administration, 34*(1), 60-71.