

Getting the *Right Things* Done

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Seen on a coffee mug:

"I want to be the kind of person my dog thinks I am."

How to Become the Kind of Person You Want to Be

"The ancient monastic tradition called a 'rule' offers a simple, compelling way to set boundaries. In monastic communities, a rule represents a voluntary commitment to do and not do particular things. It is a decision, made in a time of clarity, that helps guide choices the rest of the time. Rules turn intentions into specific commitments, commitments into actions, actions into habits and habits into a way of life." -- Jedd Medefind, *Washington Post*

"How we spend our days is, of course, how we spend our lives." -- Annie Dillard, *The Writing Life*

This handout and worksheet, which accompanies my talk at the link above, will help you create a personal values plan for yourself, to help you live out your values and become the kind of person you want to be.

You don't have to see the talk to use this worksheet.

In my work as an ordained pastor, I teach people in my religious tradition about a values planning process called a "rule of life," or more simply, "keeping a rule," that originated in Christian monastic communities. If you look up the terms "rule of life," or "keeping a rule," you will find that these terms are strongly associated with the practice of Christianity.

On my blog (annahavron.com) I call this a "personal framework" to distinguish it from the specifically western Christian practice of keeping a rule.

Just as you do not have to be Hindu to practice yoga, or to be Buddhist to practice meditation, you do not have to be Christian to practice keeping a rule of life.

I'll be using the terms "rule of life," "personal framework," and "values plan" interchangeably in this handout. It all means the same thing: writing down a reality-based personal code of conduct for yourself, and writing down a simple schedule to help you act on it.

Writing values-related decisions down, which people could read and review regularly, has been practiced by Western monastic communities for over a thousand years, to help them to live out their values. It was also done by the Rev. Dr. Martin Luther King, Jr., and the SCLC protesters during the civil rights movement of the 20th century, to help them live out their commitment to creating change through nonviolence. It was also done by Benjamin Franklin, who drew on Cato and Cicero for his. It also works for ordinary people like me, and others I know who do not make the news but who nonetheless want to make our values real in our lives, and in the world.

This handout is a starter kit for writing out your own values plan.

But why would you want to?

Don't we just *know* our own values? Do we really need to write things down about how we want to live them out?

Values, Like Goals and Boundaries, Are Both Invisible and Real

Values, like boundaries, are both invisible, and real.

We feel real effects when our values or boundaries are violated, ranging from a mild sense of irritation to full-blown PTSD, depending on the severity of the events.

When we fail to live up to our own values (which we all do sometimes, we're human!), the sense of disappointment or frustration with ourselves is also sharply real.

And when we *do* make the effort to act on our values, when we take actions in line with our values, when we live out in real life and in real time what we say is important to us -- anything from keeping a gratitude journal, to working to protect civil rights -- that's very real too, with real effects in your life *and* in the lives of others.

Living out your values comes with a palpable sense of integrity, meaning, and fulfillment.

And: it changes things in this world. It makes other things real.

Usually when people talk about the human condition, they talk about negative things about being human.

But striving to live well — wanting to grow your strengths, develop your character, use your gifts, grow into your hopes for yourself, and contribute something to the world around you through living out your values — is also part of the human condition.

The Usefulness of Values Plans Just Keeps Getting Rediscovered

This is not a new idea. It is a very old one, which keeps getting rediscovered.

The values plans known as “rules of life” in the Christian tradition originated with the rise of monasticism from the desert mothers and fathers in the third and fourth centuries CE. The best known is **the Rule of Benedict**, written around 530-540. The Rule of Benedict has subsequently guided Benedictine and other intentional Christian communities for 1,500 years. It was written for ordinary people, combining theoretical principles (e.g. reflections on classical Christian virtues such as charity, humility, faithfulness) with practical guidelines (e.g. when and how to clean the communal kitchen).

In the 18th century, a young George Washington was assigned the homework of copying out “Rules of Civility” (<https://www.mountvernon.org/george-washington/rules-of-civility>), which were widely circulated.

Benjamin Franklin made himself a “Plan of Conduct” (https://www.ftrain.com/franklin_improving_self), written in terms of developing character and cultivating virtues.

If you are interested in Stoicism, you might also hear the term “virtues.” This concept is similar to the ancient Greek concept of arete (ἀρετή), which translates to “excellence,” particularly meaning excellence in fulfilling your own potential.

And -- just as using writing to manage projects boils down to keeping a calendar and to-do lists – using writing to help you manage your personhood, the kind of person you want to be in the world, essentially comes down to keeping a code of conduct; and keeping a routine, a schedule of actions to take that are aligned with it.

If we think of planting daffodil bulbs in a flower pot as a project, something that can be started and finished, we can think of growing into our values as persons as something more like gardening, as a whole: adopting a set of *practices*, that are seasonal, cyclical.

Why It's Useful to Write Down a Values Plan

Good ideas and intentions that only live in your head usually don't get very far. But when you write down your intentions into some kind of plan, it's far more likely you'll make your good intentions real.

Writing down a list of groceries makes it more likely you will have food in your house, that you want to eat.

Writing down meeting times and events in your calendar makes it more likely you'll show up on time for your commitments.

Writing down a budget plan, and recording in writing where your money actually goes, makes it more likely you'll be able to save money.

It is incredibly helpful to write down your thoughts about what you want to do. It works with projects: we write things down on calendars and to-do lists, to get them done.

It works with budgets: it was eye-opening for me when I wrote down a list of our \$ubscription services 🧾 on a spreadsheet.

And, it works with values.

If you write down a values plan - if you write down a personal code of conduct for yourself, plus a simple routine, a schedule, to do some actions that make your values real in the world -- you are much more likely to live in alignment with what you believe is most important.

Just as a grocery list helps you get the food you want to eat into your house, a values plan helps you live out your values.

You Would Think That Monks Would NOT Have To Write Out Their Values ...

...but perhaps one reason they can live out those counter-cultural values, is because they do.

It's one thing to have a rich wisdom tradition to draw on.

It's quite another thing to take a thousand, or two thousand, or six thousand year old tradition, and figure how you -- in your short human life -- will actually live that out.

I believe it is *as important*, if not more so, to write down your values commitments -- outside of your head! -- and write yourself a little plan of how you will live them out, as it is to write your other commitments down in a calendar and a to-do list.

This is how you not only can get things done, but get the *right things* done. The things that, when you look back on what is hopefully a long and fulfilling life, will make you feel that you lived your life well.

How It Works

Let's think first about managing projects, which is something most people are more familiar with.

How does a calendar and a to-do list work to help you turn your ideas in real things, in the real world?

First, you write the stuff down that you want to get done, in your calendar and your to-do lists.

Then, you actually do some of the things you wrote down: you record the video, you show up at the doctor's appointment, you buy some daffodil bulbs.

But other things you wrote down, do not get done. (It's still the real world, right?)

Perhaps one day the dog was sick, and you had to take him to the vet. Perhaps you got an urgent email from a colleague and you had to put a project on the back burner this week.

So in order for a calendar and a to-do list *to actually work* in this dynamic, ever-changing world, *you have to review and revise them*.

The same is true if you're keeping a rule or a personal framework for yourself.

First, you write stuff down that you want to live out, to practice in real life, into a code of conduct for yourself; and into a routine, a schedule.

Then, you actually do some of the actions and practices you wrote down: you practice patience when your toddler has a meltdown; you write in your journal in the morning before you check messages on your phone; you show up with your trusty rake for the volunteer spring cleaning day of the nature trail.

But other things you wrote down, do not get done. Here comes reality again!

Perhaps one night you had insomnia, and could not award yourself the Patient Parent Trophy the next day. Perhaps you rolled out of bed, phone in hand, before realizing you meant to write down your own thoughts first, before blasting your newly awakened mind with the opinions of strangers.

So, in order for a values plan to work, just like with a calendar, you have to review and revise it regularly.

Write down some things about your values, the kind of person you strive to be in this world.

Write down a few actions and practices you can do to live those out, and a little schedule for yourself to follow.

Do some of the things. Fail to do some of the other things. (We're all human.)

Review it regularly.

What worked? What didn't? What might you try next?

Revise as needed, so that it is reality-based, and remains relevant to how you actually live.

Repeat.

This is how you make your values real in your life, and in this world.

Example: A Values Plan for a Gardener

You can get at your values by looking at the roles you live out in your life, right now.

Consider your roles in life: Most people have several. What are yours? Are you a manager, sister, citizen, grandfather, builder, activist, parent, Buddhist, gardener?

We get at our values, we get at how we want to live out our roles, by asking this question: What kind of (manager, parent, gardener) do you want to be?

Perhaps you want to be the kind of parent who listens. Or you want to be the kind of manager who fosters leadership in the people who report to you. Or you want to be the kind of citizen who votes.

Perhaps one of your roles that's important to you, is being a gardener.

If you're a gardener, *what kind* of gardener do you want to be? What effect do you want to have on the world through your gardening?

There are all kinds of gardeners in this world. What kind do you want to be? What, to you, makes someone an excellent gardener?

You can also get at your values, the ones you can live out, by **considering your relationships with various life areas**.

We are all in relationship, in one way or another, with life areas like money, technology, the natural world, other people, our selves, and that ultimate aspect some of us might think of as God / Life in the most expansive sense.

With our relationships to various life areas, we can ask these questions: What place do you want (money, technology) to have in your life? How do you want to shape your relationship with (your self; others)?

For example: let's say you are considering your role as a gardener, and you are also considering your relationship to the natural world.

What kind of gardener do you want to be? Let's say you've decided that you want to be the kind of gardener whose garden collaborates with the natural world, rather than fights it.

So you might decide, for your values plan, or your rule of life, that you will shape your relationship to the natural world by the ways that you garden.

So, what actions will you take to live that value out? And when will you act?

Perhaps you decide that next spring, you will add some local plants that the local wildlife can thrive with.

Perhaps you decide that every fall, you will let the garden bed stay messy and weedy to shelter birds and insects over the winter.

Now you have a code of conduct and a schedule, to help you live out your values as a gardener.

You've taken a values-related stance — "I want my garden to collaborate with the natural world rather than fight with it" — and you've identified a couple of actions you can take: "I'll add some wildlife-friendly local plants, and in the fall, I'll let the garden look messy to human eyes, but friendly for birds and insects seeking food and shelter over the winter."

When will you add some native plants to your garden? *Next spring.*

What will you do, now, *each fall* in your garden? NOTHING! (Yay!) Your previously energetic garden work, your doing things, will become a practice of *not doing*, in the fall, in your garden. You will let the weeds that the birds have planted, stay there over the winter. You will take on the challenging contemplative practice of *letting the garden be*, and letting the birds and insects manage it to their liking over the fall and winter.

You now have a personal gardening code of conduct, and a schedule.

It's short and sweet.

But it is there.

And it *will* make a difference.

On the next page, you'll find a worksheet you can fill out, if you like, to make your own values plan, or rule of life, or personal framework – or whatever you wish to call it.

Whatever you choose to call your values plan, I encourage you to:

- Write it down.
- Review it regularly.
- Revise as needed.

Worksheet for Creating Your Own Values Plan

The Roles and Values You Live Out

Write down three roles in your life that are powerful for you, that you most closely identify with, and that you want to live out well.

Here are some prompts to get you started:

- *Family and friends* - friend, mother, father, parent, child, aunt, uncle, spouse, sibling, grandparent, godparent, cousin, ...?
- *Wider community roles* - citizen, online community member, neighbor, a member of a faith community, coach, volunteer, mentor, voter, activist, a member of an affiliative community,...?
- *Work-related roles* (paid or unpaid; this is about your work in the world) -- artist, gardener, nurse practitioner, developer, librarian, carpenter, writer, artisan, manager, electrician, caregiver, engineer, teacher, cook, designer, firefighter, barista, home-maker, business owner, lawyer,...?

All of these roles can be lived out ethically... or not. Lived out with excellence... or not.

What roles do you want to look back on at the end of your life, and feel that you have lived them well?

Write down three roles that are important to you, here:

Role 1: _____

Role 2: _____

Role 3: _____

Next, for each of these three roles, you'll write down something about how you want to live out that role.

What actions could you take, to make your hope for that role, your aspiration for that role, real in the world?

It can help to think of role models for these. Think of others in that role, whom you admire. Let's say one of your roles at work is to be a manager, and you want to be a good manager.

If you know a manager you admire, what do they do that makes them admirable?

What actions and behaviors make someone an *excellent* manager, someone whose example inspires you?

Sometimes we can get at this by thinking about anti-role models, negative examples. What makes someone a manager you *don't* want to emulate? What did they do, and what didn't they do? What would be some opposite, and aspirational things to do?

What are your role models — or anti-role models — doing, or not doing?

Take the three roles you listed above, and write something down about the way you want to live that role out, the kind of person you want to be, through that role.

Then write down ONE action or practice that will help you live that value out.

Examples:

- "I want to be the kind of parent who listens."
 - *One action:* "I will practice asking my children open-ended questions to see what they think, instead of immediately telling them what I think."
- "I want to be the kind of gardener who has a bird-friendly garden."
 - *One action:* "I will learn more about which plants I can add that birds can use for food or shelter."

Role 1: "I want to be the kind of _____ who

_____."

What's ONE action, or practice, that you might commit to, to help you do this?

Role 2: "I want to be the kind of _____ who

_____.”

What’s ONE action, or practice, that you might commit to, to help you do this?

Role 3: “I want to be the kind of _____ who

_____.”

What’s ONE action, or practice, that you might commit to, to help you do this?

Your Values in Relationship to Life Areas

Consider your relationships to various life areas, for example: the natural world; your health; your money; technology; being online; God/Life in the most expansive sense; your home and possessions; your community,...?

What place do you want your various life areas to have, in your mind and heart, and on your schedule? How will you shape your relationship to them?

Write down three life areas, that you want to manage more intentionally:

Life Area 1: _____

Life Area 2: _____

Life Area 3: _____

Now, for each of the three, write down an action or a practice. Write down how you could shape your relationship to that life area.

Examples:

- “I will shape my relationship with technology by taking a screen-free Saturday each week.”
- “I will shape my relationship with money by choosing a cause I believe in, and donating to it as regularly as I pay my bills.”
- “I will shape my relationship with my self, my inner life, by making time to journal in the evening.”

Write down three reasonable actions you could take, in relation to the life areas you wrote down above:

Life Area 1: “I could shape my relationship with _____ by _____.”

Life Area 2: “I could shape my relationship with _____ by _____.”

Life Area 3: “I could shape my relationship with _____ by _____.”

Don’t worry if you find some overlap here between your roles in life, and how you interact with various life areas.

That’s good!

It means as you ask yourself questions about your priorities in different ways, *that some priorities keep showing up.*

That’s really useful to know!

Accountability: To Whom Do You Listen?

We all have to figure out how we, as individuals, will live out our values. How will you hold yourself accountable for living out your values?

To whom do you listen?

Who can hold up a vision of excellence for you?

Who can tell you when you're being too hard on yourself?

Who can suggest new challenges or reframe things for you, when you feel stuck? How will you know when you are off track? How will you know when you are being unrealistic?

Where will you find encouragement, inspiration, and community in living out your values?

Which books, friends, podcasts, mentors, role models, spiritual directors, counselors, family members, small groups, faith or philosophical traditions, or other intentional communities, might help you keep your rule (or personal framework)?

Write down three resources you can draw on for encouragement, guidance, course correction, and inspiration, here:

Resource 1: _____

Resource 2: _____

Resource 3: _____

Hopefully by thinking through some roles in your life, and some of the ways you would like to shape your relationships to various life areas, you have a sense of some actions you can take to live out your values.

And, by writing these things down, you have just created a written code of conduct for yourself.

You identify some roles in your life, and areas of life that are important to you, to manage with intention.

You identify some possible values-related actions and practices you can do.

You identify resources you can draw on, to help you stay committed to living out your values.

The next step is to make it do-able; to make it actionable.

Making Your Values Plan Actionable

For a rule of life, or personal framework, the whole idea is to put your values into *action*.

In order to do that, you want to be sure your actions are, well, actionable. For most of us, that means — unless it is a practice you are already doing — *starting small*. And by that I mean: *small*.

It is better to do something really small, that you do regularly, than to plan something more ambitious that you never actually live out.

Lots of small actions grow; and lots of impressive plans sit uncreated.

Think seeds in a garden, versus unused blueprints in an archive.

Start *small*.

If you find that you're not actually doing it, revise your plan to something *ridiculously* small. Or, you might wish to choose a different action to practice with.

Actions You Can Realistically Commit To Taking

Actions and practices are do-able when they are clear, concrete, and reasonable. Correspondingly, the test for what it means for something to be “clear, concrete, and reasonable” for you, is that *you are actually able to do it*, on a regular basis.

So this means you don't want to write down actions that are too ambitious, or too vague. Some examples:

Let's say you want to meditate regularly, but you don't really have a meditation practice. (Yet.)

Too vague:

“I will meditate every day.”

Too ambitious:

“I will meditate for 45 minutes a day.”

Clear, concrete, and reasonable:

- “I’ll set a timer before I leave to pick up the kids, and meditate for 5 minutes.”
- “I’ll start *ridiculously* small by taking one mindful breath each day.”

Here’s another. Let’s say you want to shape your relationship with the natural world by starting to consciously reduce your consumption.

Too vague:

“I will buy less stuff.”

Too ambitious:

“I will buy nothing new over the next year.”

Clear, concrete, and reasonable:

- “When I want to buy something new, I will give myself a 24 hour waiting period first.”
- “When I want to buy something new, I will ‘shop the house’ first.”

Creating a Schedule to Live Out Your Values-Based Actions and Practices

How might you live out your values, in regular actions and routines?

Some actions and practices can be done according to a routine.

Actions and practices like going for walks, journaling, and attending religious services, can be done daily, weekly, seasonally.

Other actions and practices are NOT incorporated into your routines, but are triggered by circumstances.

For example: planning to wait for 24 hours before buying something new; planning to count to ten when you become aware that you are losing your patience.

Pick Three Actions...

By now, you should have a list of ideas for possible actions you can take, to help you become the kind of person you want to be in the world.

Check out what you wrote about how you want to live out some of your roles, and about how you might shape your relationships to some life areas.

Choose three actions that are:

- Clear, concrete and reasonable
- Resonate for you (you're excited to try them!)
- At different intervals (don't burden yourself by picking three things you're doing daily, for example)

Pick three.

Your Values Plan (Rule of Life, Personal Framework)

Now, you make a schedule, a routine for yourself. You have three actions, related to your values. When will you do them?

Below, write down your three actions, and how often you will do them:

"I am committing to the following three actions or practices:

Action or practice #1)

If it's something that can be scheduled, write down how often you will do it:

I will do this: __ daily __ weekly __ seasonally (how often is "seasonally" in this case – every other week, monthly, quarterly, annually...?)

(Example: "Once a week, on Friday nights, I will turn off my phone, and won't turn it on again until noon on Saturday.")

If it's something that cannot be scheduled, write down what circumstances will prompt you to carry out this action:

When _____, I will: _____

(Example: "When I feel myself losing patience, I will take three deep breaths.")

Action or practice #2)

If it's something that can be scheduled, write down how often you will do it:

I will do this: ___ daily ___ weekly ___ seasonally (how often?)

If it's something that cannot be scheduled, write down what circumstances will prompt you to carry out this action:

When _____, I will: _____

Action or practice #3)

If it's something that can be scheduled, write down how often you will do it:

I will do this: ___ daily ___ weekly ___ seasonally (how often?)

If it's something that cannot be scheduled, write down what circumstances will prompt you to carry out this action:

When _____, I will: _____

Add in Any Values-Related Actions You ALREADY Take

Most people have values-related practices they already are doing.

Perhaps you attend a weekly meditation group, or keep a gratitude journal, or make it a point to get outdoors on a regular basis.

Add them. These activities are also part of your rule of life (or personal framework). The power in creating a values plan is that – like a calendar or task list – it is written down.

“I will continue my commitment to...

(Example: “I will continue my commitment to attend my weekly meditation group.”)

Commitment to Review

Now, write down how often you will review this document (I recommend aiming for once a week, and no less than once a month... and get yourself a favorite beverage to enjoy while you do this):

Commitment to Staying Accountable

Finally, write down how you plan to stay accountable in reviewing, adapting and keeping your rule (or personal framework). What support will you draw on to help you keep this real?

Now, you've got a code of conduct and a schedule: a plan to help yourself live into the values that are important to you.

Writing down your commitments about how you will put your values into action, is huge! Congratulations!

The Key to Making It Work

- You've written down a code of conduct for yourself; some ideas about how you can act on your values, based on your roles and relationships in life.
- You've written down three clear, concrete, reasonable (and perhaps ridiculously small) actions.
- You've specified either the schedule for doing them, or the circumstances that will prompt you to take the action.

The key to making it work is to

**review it regularly,
and revise it as needed.**

What worked? What didn't? What can you adjust? What can you try differently? What's next?

Be friendly, kind, and compassionate toward yourself. Be reality-based. And be persistent, be willing to hold yourself accountable for this, in the kindest way.

It is more valuable to do small things regularly, than to make big plans you don't act on. Small things can often surprise you with their effects.

I try to sit down with my rule of life weekly. Some months, it's every other week, or even once a month.

But I keep returning to it, I review it, I adapt it, and indeed, I am living my values out. Not perfectly; but more so than if I had not created a rule of life, a personal framework for myself.

It's my personal code of conduct and schedule, that I wrote down, which I can review and revise regularly.

I feel much happier with how I'm living my life since I began this practice.

I hope this practice of keeping a values plan will also be inspiring and useful for you.

Other Helpful Things to Write Down for Your Values Plan

A rule of life or a personal framework can also be your archive for general sources of inspiration and life lessons. (This is why I use a 3-ring binder for mine, and not a page or two.)

You might not want to review the whole thing each week **(but do review your code of conduct, and your schedule each time; and revise as needed)**.

What else might you want to have on hand to refer to?

Some ideas:

- personal policies / personal boundaries (one of mine is: "Wait 24 hours before responding to an upsetting text or email.")

- the text of any oaths you have sworn, like the Hippocratic oath or an oath of office; or vows you have taken (see: <https://www.annahavron.com/blog/dont-hold-a-job-hold-an-office-instead>) - these are miniature codes of conduct
- any other ethical commitments you have made to yourself, or others
- things you want to try someday
- inspirational quotes
- keep track of what drains you, and what energizes you
- write down a description of your ideal future
- life lessons
- a list of your talents and gifts and strengths

Try it out, experiment with it.

It is *yours*.

¹ Jedd Medefind, "Here's the Best Thing You Can Do for Your Life in 2017," *Washington Post*, December 30, 2016, sec. Acts of Faith Opinion, <https://www.washingtonpost.com/news/acts-of-faith/wp/2016/12/30/heres-the-best-thing-you-can-do-for-your-life-in-2017/>. Accessed June 27, 2018

² Annie Dillard, *The Writing Life*, 1. ed., 11. print (New York, NY: HarperPerennial, 1995).