


Making Time for Research (and You): Using an “Intentionality Toolkit” to Achieve Your Goals and Mitigate Feelings of Overwhelm

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Abstract

Introduction: Academic, professional, and personal life are a lot to balance, and there is always more work to do than there are hours in the day. The Bullet Journal Method, the Weekly Meeting, and the Semester Plan, which come together as an “intentionality toolkit,” are three practices to help prioritize competing interests, mitigate feelings of overwhelm, and practice saying “no.”

Experience: Each method hosts its own distinct benefits: the Bullet Journal Method offers a strategy for managing your day-to-day tasks, the Weekly Meeting provides short-term planning and the opportunity to practice saying “no” to requests, and the Semester Plan helps break down long-term goals into smaller, achievable tasks.

Discussion: An intentionality toolkit can help in numerous ways. This includes reducing cognitive load; improving prioritization practices; improving openness and flexibility; mitigating perfectionism; owning your time; and incorporating reflective practices into your workweek. This isn’t a perfect toolkit. It is a set of options that might be beneficial to librarians.

Takeaways: These three techniques create a toolkit to provide structure and personal accountability, specifically to achieve goals that traditionally have less oversight and accountability, like writing and research.

Introduction

We are asked daily to make choices about a variety of competing priorities: emails, consultations, child- and elder care decisions, teaching, professional development, sick time (for yourself or someone that depends on your care), research interests, vacation time, service commitments, doctor appointments, travel, and so much more. Requests from our supervisors compete with our own priorities or goals, and creating a thoughtful reply can feel daunting – maybe even career-ending if you feel you need to say “no” to a request. Our lives are made up of uniquely complex dynamics, which, unaddressed, can feel overwhelming and crushing.

This paper highlights three techniques that comprise an “intentionality toolkit.” These include the Bullet Journal Method, the Weekly Planning Meeting, and the Semester Plan. While not the cure for burnout or the stresses of life, the toolkit is a starting point. It is of use to librarians and professionals who wish to improve control over their day-to-day activities, achieve long-term aspirations, and practice saying “no” to requests that are not aligned with their goals.

The Bullet Journal Method

Ryder Carroll published *The Bullet Journal Method* in 2018¹. The book formalized his organizational method, publicly available since 2013². Carroll created the Bullet Journal Method to help him manage his own Attention-Deficit/Hyperactivity Disorder (ADHD) and describes the method as “a cross between a planner, diary, notebook, to-do list, and sketchbook”^{1(p4)}. The method has a low start-up cost (requiring only a notebook of your choice and a writing instrument) and is highly flexible.

Carroll designed the Bullet Journal Method to be one place for all things – “you no longer have to wonder where your thoughts live”^{1(p18)}. One notebook with everything in it is a lot easier to keep track of than a smattering of sticky notes, to-do lists written on scraps of paper, meeting notes saved on your PC, project notes in one notebook, webinar notes in a different folder – and on and on. One place for everything (or most everything) lightens cognitive load – or the amount of working memory being used to keep track of the important information in the world around you³. See Appendix 1 for more information, images, and examples of the method.

In both physical and digital formats, task management and tracking improves productivity, time management, and organization⁴ as well as task completion and efficiency^{5,6}. Journaling is linked to a variety of benefits, including better sleep, a stronger immune system, and higher self-confidence⁷, and is widely studied in dissertations and theses⁸⁻¹⁰, knowledge syntheses¹¹⁻¹³, and websites and blog posts¹⁴⁻¹⁶. A handful of studies explore the benefits of bullet journaling specifically, with results that focus on mindfulness¹⁷, the exploration of self¹⁸, and improvements to mental health¹⁹. Intrinsic and extrinsic barriers do exist to journaling, however, and understanding these barriers plays an important role in the adoption of any new practice²⁰.

The Weekly Planning Meeting

The Weekly Planning Meeting (WPM, or sometimes the “Sunday Meeting”) was introduced by Kerry Ann Rockqu Shore, the founder of the National Center for Faculty Development and Diversity (NCFDD), in 2010²¹. The WPM takes about 30 minutes, and is composed of three parts: skeleton, brain dump, and task assignment. This meeting can happen at either the beginning or end of a work week – but it is more important that the planning happens before the new week begins. See Appendix 1 for more information on the Weekly Planning Meeting in practice.

The first step, the skeleton, helps create the foundation for the coming week. This step elucidates the time available to focus on projects and goals. The skeleton for the week is created by blocking off time in your calendar for all those items that are important or critical to work and life. Items in this step include appointments, picking up the kids from daycare, classes, team meetings – anything where your absence would be noticed.

Next, the brain dump allows for the free-flow of information from brain-to-paper and helps make all the tasks for the coming week – and beyond – evident. This list might be long, especially in the beginning.

Finally, items from the brain dump are prioritized, then assigned to a chunk of time in your calendar.

The Semester Plan

The third skill in the intentionality toolkit is the Semester Plan, a part of the NCFDD’s Core Curriculum²². While the NCFDD is geared towards teaching faculty, who typically have 10-month academic contracts, a lot of their advice can be modified to a 12-month contract.

A Semester Plan taps into long-term goal setting while providing the structure to break goals down into achievable pieces. You first brainstorm the goals you would like to achieve and then select two to three goals to prioritize for the semester (or a six-month period – whatever works for you).

Next, you brainstorm all the steps it could potentially take to accomplish each goal. This helps clarify how long it might take to complete your goal – by breaking the goal down into discrete tasks, you make the implicit more explicit. One way to accomplish this is to frame your tasks using the SMART (Specific, Measurable, Achievable, Relevant, and Time-bound) goals framework, first proposed in 1981 by Doran²³. This method will help you craft a specific task to accomplish, versus a vague idea to pursue. For example, “Revise manuscript” is vague – it is difficult to measure and see your progress. But “spend 25 minutes working on revisions for our manuscript for three days this week” is something that is specific (write for 25 minutes); measurable (three days); achievable (is doable in the time period allotted); relevant (need to revise in order to publish); and time-bound (completed this week).

Finally, as with the Weekly Planning Meeting, you assign your tasks to a particular week in the semester.

Experience with the Bullet Journal Method, Weekly Planning Meetings, and Semester Plans

These three tools are the parts of an “intentionality toolkit.” The toolkit helps me mitigate feelings of overwhelm, plan for the future, and say “no” to projects that do not align with my own goals. I feel more intentional about my days, and feel more empowered to navigate tremendous life changes, including having children, searching for and starting new jobs, planning big moves, and experiencing major health events or family crises. I’ve also published several articles, established new services for data management and for evidence synthesis, and navigated a contentious and emotionally exhausting faculty leadership role. My practice – and to be candid, therapy – has helped me keep afloat.

Day-to-Day Task Management and the Bullet Journal Method

When I started my first librarian position in 2012, I wondered how to accomplish all I needed to do. I felt overwhelmed and became a regular “work-crastinator” – where I procrastinated productively by doing small, fun projects, instead of devoting time to bigger, more complex projects. I felt like I didn’t have any long-term goals or aspirations, though I knew I wanted to publish. When I took my first tenure-track job in 2014, publishing became even more pressing, but I couldn’t figure out how to make the time. I didn’t feel as though my degree prepared me to develop a research agenda, much less how to write and publish. I did not recognize that I needed help with the nuances of scaffolding my work and my career, from the granular day-to-day and week-to-week support to the large-scale semester planning to achieve my goals. I felt pulled in many directions, from moving between meetings, to the classroom, to a faculty request – sometimes with very little notice. Additionally, our tenure process and criteria were opaque. I felt anxious about doing “enough” to get tenure but was never clear on what “enough” meant, nor how to get there.

I took up bullet journaling in August of 2016 to start organizing my day-to-day tasks. I abandoned the practice after less than a month – in part due to an extensive and complicated

family health emergency that required most of my attention. When my family and I returned to our new normal around January 2017, I tried again. Since then, I've used my bullet journal nearly daily.

My first bullet journals started out as very pretty – perhaps closer to what you might imagine if you've come across bullet journals on the Internet. I liked to include hand-drawn images to separate the months. I used a lot of color to make each week stand out. I outlined boxes to designate as spaces for reflection, doodles, tracking the weather, to-do lists, and more.

As I found myself with less free time to spend with my bullet journal, I dropped the practices that were time-consuming. I spent less time optimizing and perfecting my designs and focused instead on writing down what I wanted to track. My bullet journal is my safe space for my work.

I use my bullet journal to map out complex projects, brainstorm new ideas, keep track of my tasks, see my progress, and see trends in where I am spending my time (see Appendix 1 for more information about my method). In the beginning, I dropped the ball on some projects, but I also learned I did not allow enough time for my tasks, and I was not prioritizing larger projects. As my practice with bullet journaling and time management has progressed, my ability to complete self-started projects has improved.

One thing I deeply appreciate about the Bullet Journal Method is its flexibility. There are no set pages – every new page is a new possibility. For example, when I have the sensation of my brain being full, I know I need to offload some information into my bullet journal. I need to pause and take some time to figure out what is causing my cognitive load to get filled up, and why it's happening. This tends to look like a brain dump plus sorting task. I open my journal to the next new page and write down everything I think I need to accomplish. Then I take a quick break. When I revisit my list, I sort each item into one of three categories – must do, could do, and want to do. Each category has its own weight, and it helps me see what I “must” do in the next day or so, what I “could” do in the next week, and what I “want” to do – but can be put off to the future.

This flexibility also allows me to change my practice in response to my needs for the current day, week, month, or semester. For example, because I only plan my bullet journal a day at a time, the following page is a blank canvas. This makes it a straightforward task to take notes on a meeting or a webinar on the following page. I am not constrained by a pre-printed format – I am free to use any page as I see fit. Or perhaps one week I want to track my progress on overhauling a LibGuide: On a blank page, I can write out each step of the process and when I accomplished the task, as well as notes to myself. Self-directed learning with individual courses can have a small table where I track my progress. And long-term projects, like supporting a team on an evidence synthesis project, can have two or more pages devoted to tracking our progress. This isn't to say this information can't live elsewhere; but it's helpful to me to know I have it in a space that is just for me.

The Bullet Journal Method's flexibility extends to layouts and approaches. I have experimented with design – using journals with thick paper that support watercolor and markers, as well as thin paper with minimal amounts of color. I've iterated continuously how I track information, especially around what information I track for my annual reports. I have

found it much easier to write a yearly report when I have kept track of my progress on projects in a space allotted for that purpose. The bullet journal works for me – I am not constrained by any one format.

The freedom to iterate bleeds into other areas of my life and work: nothing needs to be perfect, because everything can change. This has helped reinforce a “growth mindset” – a way of thinking that embraces change, failure, and development.

Finally, I want to highlight that when you go looking for ideas about bullet journals, you may be overwhelmed by the artistry that goes into them. Or, you may have an idea of what a bullet journal “looks” like: Instagram, Pinterest, and Internet searches will show you highly curated bullet journals. They may be beautifully artistic or look like a scrapbook, full of well-laid out pages that take ample time (and resources) to create. This is not what I am advocating. At its core, the Bullet Journal Method is a method of being intentional about your time. Your bullet journal is for you, and you alone. There is no “right” way to keep a bullet journal. If you want to explore drawings and doodles and scrapbooking – of course you can. But you don’t have to. All you need to begin is a notebook, a writing instrument, and a willingness to try.

Short-Term Planning, Saying “No” with your Calendar, and Weekly Planning Meetings

In late 2017 and early 2018, I had two pivotal changes: I accepted a newly created position tasked with implementing a brand-new service at my library, which was quickly followed by the birth of my first child. While my bullet journal helped me plan one day at a time and tasks to accomplish in a particular month, I found I needed an intermediate step between thinking about my day and thinking about my month. I had a lot of uncharted territory to navigate.

I needed more training. I first came across Library Juice Academy’s *Working Faster, Working Smarter, Productivity Strategies for Librarians* in July of 2018²⁴. It was one of my first introductions to breaking out of the busy-ness trap, and planted the seed for intentional, long-term planning. The course was the foundation for practices I refined through another professional development opportunity: The National Center for Faculty Diversity and Development’s (NCFDD) Core Curriculum²⁵.

One of the major practices I took away from the Core Curriculum training, and the second piece of my intentionality toolkit, is the importance of giving myself 30 minutes to plan for the coming week. This was transformative: planning my week puts me in control of my calendar and my time. The Weekly Planning Meeting helps me understand what time I have available to do my work and helps me chip away at my goals. It also reduces the time I spend deciding on what I should do next.

The result of the Weekly Planning Meeting is a fully-booked calendar, accomplished one week at a time. This means no last-minute bookings, and I get to decide whether to accept a last-minute meeting request. This works with faculty requests, too – my time is already spoken for, so I may need to decline some requests. “No” is a muscle that I give myself ample opportunities to practice. This transforms my calendar from a passive tool to help remind me to go to meetings, to an active partner in helping me say “no” to last-minute requests.

Additionally, having my week fully booked means that I am more likely to pause and figure out what I say “yes” to. My weeks are already full of the work I need to accomplish as part of

my job and the goals I have set for myself. Looking at a fully booked calendar helps remind me that, to get my work done, I need time. Time itself is finite and fickle, and I can't make more time magically appear.

The Weekly Planning Meeting has some potential pitfalls: you must be able to honor your own time, because you are the only one holding yourself accountable to this work, and you must be able to prioritize knowing we can't do it all in the time we have available to us. Humans are notoriously bad at predicting how long a task will take (known as the planning fallacy, coined in 1977^{26,27}), with humans often woefully under-estimating how long a task will take. A good rule of thumb is to multiply an initial estimate by three – so if I initially think a task will take me one hour to finish, I give myself three.

I also find that I am not afraid to block out time even further in advance. A complicated evidence synthesis project I am undertaking with several librarian colleagues deserved some planning ahead of our kickoff meeting – so I set aside a couple of hours of time for four weeks ahead of the project kick off. If I missed a little bit of this time because of a more urgent matter – say I need to prep for a class or schedule meetings for a hiring committee – then I can adjust, knowing I have set aside time to set myself up for success.

One way I have found helpful to honor my time commitments is to frame this blocked off time as meetings with myself. I wouldn't cancel a meeting with a colleague just to respond to an email. I am just as important as my colleague, and a meeting with myself is just as important as a meeting with a colleague, a student, or a faculty member.

Prioritizing takes practice, and this practice may elicit some feelings – around worth, productivity, and more. A saying I like to keep in mind is: “If everything is a priority, nothing is a priority”²⁸. There are many techniques on how to prioritize, like completing a structured brain dump²⁹ or filling out an Eisenhower Matrix³⁰. These techniques help you achieve clarity on where your limited time and energy should go.

You may find you want some external accountability. An accountability buddy is one way to set up a supportive network, and programs like CoJourn^{31,32} offer a structure to that support.

Long-Term Planning and the Semester Plan

The final piece of my intentionality toolkit is the Semester Plan. This step, also part of the NCFDD's Core Curriculum²⁵, takes some practice. The Semester Plan relies on our ability to break down our big ideas into small, accomplishable tasks. All my Semester Planning happens in my bullet journal. I dedicate several pages to this work, because it is highly generative. See Appendix 2 for an example of a Semester Plan. I need space to brainstorm my goals and write out the steps I will take to accomplish my goals. I balance this with a structured chart that lays out what I will accomplish each week. There are many successful ways to approach a Semester Plan – this might be a spreadsheet or on your whiteboard. Because my bullet journal is the home for all my work, my Semester Plan “lives” in my bullet journal.

When I noticed that I kept forgetting to devote time to my Semester Plan dictated tasks when setting up my week during my Weekly Planning Meeting, I modified my practice. Once I complete my Semester Plan, I add my tasks associated with each week of the semester into

my work calendar. This small modification has helped me immensely, because I'm already in my calendar with my Weekly Planning Meeting, I can easily see what my focus for the week is. My bullet journal is my generative space; my calendar is where I hold myself accountable for my goals.

Another challenge is figuring out the "right size" for a task that is assigned to a week. I've found that it really depends on the difficulty of the task – according to what I perceive as being difficult. For example, I found a cold-call email introducing myself to an advising director really challenging to do, so to make progress on my goal of connecting with students, my goal became "email [a colleague] for feedback on email to advising director." Don't be afraid to get granular if a task is holding you up.

Finally – importantly – your Semester Plan should be considered a guide, not a playbook. The plan won't be perfect, but it'll get you closer to a goal than if you didn't have a plan at all. For example, I've been able to complete lengthy, self-paced trainings because of my Semester Plan. When a project on curriculum mapping took an unexpected pivot, I didn't abandon my plan or feel like a failure. My plan pivoted, and I adapted my goals as needed to work towards a greater understanding of the areas I work with.

Discussion: Benefits of Using an Intentionality Toolkit

The Bullet Journal Method is about cracking the code of your own intentionality. Note it's not productivity – we aren't machines and there is no way to do more with less, a way of thinking that leads to decreased motivation, stress, lower morale, poor results, and burnout³³, especially among women³⁴. You can use the time you have in your working day with intention. And because you are being intentional and documenting, you can see your progress on your projects.

An intentionality toolkit can help you in numerous ways. This could include: reducing cognitive load; improving prioritization practices; improving openness and flexibility; mitigating perfectionism; owning your time; and incorporating reflective practices into your workweek. It's also not a perfect solution and has some limitations, which are briefly discussed below.

Reducing cognitive load. Perhaps one of the biggest benefits of the task-management aspects of bullet journaling is the reduction in cognitive load. The simple act of writing down what is on your mind frees up the space in your brain: that item no longer takes up space in your working memory³⁵. Your journal is a safe, consistent, and structured space. It is a reliable place for your brain to offload the tasks it has been carrying around. No more worrying about where that sticky note went, which file you saved that to-do list in, or if that to-do list lives in your email, on your pc, in your phone, or on the fridge. All these items are in the same place, lessening your cognitive load.

Improving prioritization practices. You will discover, in completing a Weekly Planning Meeting, and likely in your Semester Plan, that you have more you wish to accomplish than you have time for. This is a painful discovery, and a pitfall of academia and academic work: There is always too much to do, something to perfect, another email to write. None of us can accomplish all our tasks in the working hours we have allotted each week. It's just not

possible.

The Weekly Planning Meeting is regular practice in prioritization. As you continue to practice prioritizing, you'll improve your confidence in knowing what aligns with your goals, and what might be nice to do, but isn't possible for now. This can also help with work-life balance and offer a balm in burnout culture, though prioritization is not a solution to burnout.

Improving openness and flexibility (or changing course when things aren't working).

The combination of the long-term view with a Semester Plan and the day-to-day advancement on tasks with your bullet journal has you constantly in touch with your progress. You begin to notice trends and make adjustments as necessary. Practices are modified, tweaked, or even dropped.

Dropping a practice is not giving up or failing. Walking away from something is hard to do. The narrative that you did nothing or will lose everything by dropping a practice does a huge disservice to your time and your ability to adapt. These tiny practices in adjusting your work help you see that modifications and flexibility happen all the time and are a normal part of work and life. That doesn't make change any less difficult – but perhaps it makes it more evident.

Being ok with imperfection / mitigate perfectionism. In bullet journaling, it can be tempting to try to make lines perfectly straight or figure out the “perfect” colors for this month. You may try to develop the “best” Semester Plan that requires no modifications. You will also be in your bullet journal nearly every day, writing down tasks, checking them off, trying again tomorrow, or crossing them off completely. These are all tiny moments working in imperfection.

Each piece of the toolkit is for your benefit, and none of them are set in stone or immovable. Our lives can change quickly – the flexibility of the bullet journal, and a mindset that our Weekly Planning Meetings and Semester Plans are guides are the foundations to flexibility.

Owning your time. Time is a finite resource – you cannot make more time appear, and it progresses without ceasing. Adopting the Weekly Planning Meeting to block out your calendar a week in advance means you dedicate time to your own goals – you are not at the whims of others. This demonstrates to students, colleagues, faculty, and collaborators that your time is important and has value. You aren't hoping for a block of time to magically be free – you've made it a priority.

Additionally, this helps you practice saying “no” – consider the time you block off in your calendar as meetings with yourself. You cannot be in two places at once. Your time is important. Your goals are worth achieving. Adhering to your calendar will help you immensely.

Inevitably, things with a short timeline will turn up, or a collaborator reaches out unexpectedly asking for a quick turnaround. With this practice, you can thoughtfully reply with an emphatic “yes,” a “no,” or an adjustment to your calendar, knowing that you own that reply.

Incorporating reflective practices into your work week. One component of the Bullet Journal Method is the practice of deciding what to do with unaccomplished tasks from the previous week, also known as migration. While not formally touched on above, it's an important piece: looking at what you accomplished, and noting what you didn't accomplish, helps you see trends. This practice helps you get curious with yourself – was that item just not important this week? Why or why not? What is stopping me from accomplishing that task? Is this practice helping me or is it causing anxiety or frustration? What do you need your bullet journal to do for you? A few minutes reflecting during your Weekly Planning Meeting can help clarify what is holding you back.

It's not perfect and limitations of the toolkit. Brain dumps, calendar blocking, and Semester Plans can all be profoundly helpful – but they aren't perfect. You may exist in an organization with faculty that request quick turnaround times; you may struggle to adopt a new habit; some work may come to you outside of normal business hours; you may still feel overwhelmed despite adopting these tools. You may balk at the inflexibility of the toolkit: perhaps telling a faculty member you need several weeks before you can begin working on a project feels like a reprimand waiting to happen. You may feel pressures from your supervisor, time sensitive tasks, and meetings on a short timeframe that are complicated to coordinate. But this may also beg for a change in mindset: if a project is truly a priority, say, partnering on an important grant, you can say yes knowing how to shift your other priorities. As professionals, our time dedicated to our work is important. The point here is not that everyone's priorities are the same: the point is that your priorities are under your control and guidance.

These tools won't change your working environment, nor can you control what your colleagues do. But – they will help you establish boundaries, practice saying “no,” and they will help you think about long-term opportunities and how to achieve them. Your practice will make it easier to assert your values and priorities.

Takeaways

Academia is full of possibility, so much so that we could spend all our days on projects, teaching, improving methods and workflows, and more. While much of our work requires us to adhere to deadlines or be in a specific place at a specific time – on the reference desk, in a classroom, in our own workspace – a portion of our work has no deadlines, no outside accountability, and no timeline. For this work we need to rely on other tools to give ourselves structure and accountability. The Bullet Journal Method, the Weekly Planning Meeting, and the Semester Plan are three such tools to help us look at our work through the lens of the day-to-day and the year-to-year, and to see how our days align with our priorities.

Changes in life can require adjustments in thinking about how time is spent. That might be major family changes, moving, personal health and wellbeing, your needs as a worker or a caregiver, or any number of big events. At some point, you may reach a point where your mind overflows with tasks, ideas, and to-do lists – and you wish for a way to organize all the stuff in your head. I hope you will experiment with one or more of the methods in the intentionality toolkit I've described. If you find a practice that makes your life and work better, I hope you will share it.

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