TAILORED 2U ~ PRACTICAL TOOLS

# Before You Say Yes

A practical capacity and boundaries check

Use this 10-minute check before agreeing to a project, favor, volunteer role or recurring task. Clarify what the commitment involves, what it will displace and what you can realistically offer.

## 1 Define the request

Ask what needs to be delivered, when it is needed and who makes decisions. Is this one task, or could it become an ongoing responsibility? Include meetings, preparation, revisions and follow-up.

The request and what done looks like: _____

_____

Deadline and expected finish date: _____

## 2 Count the full commitment

Estimate the whole job, including messages, travel, setup and cleanup. Check whether you need information, access, equipment or someone else's approval before you can begin.

Time needed: _____ Costs or resources: _____

What I need from others: _____

_____

## 3 Check what is already committed

Look at your actual calendar and energy, not just an empty time slot. Consider paid work, family responsibilities, rest and existing promises. If this takes longer than expected, is there room?

If I say yes, what will wait, move or stop? _____

_____

_____

## 4 Notice why you want to say yes

A worthwhile request can still arrive at the wrong time. Separate interest and purpose from pressure to answer immediately.

☐ I want to do it ☐ It fits my priorities ☐ I feel obligated

☐ I fear disappointing someone ☐ I need more information

Before answering: "Let me check my commitments and get back to you by ____."

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# Choose Your Answer

Make the commitment clear before you begin

### 5 Set the limits that would make it workable

You may be able to offer a smaller task, a later date or a defined amount of time. State what you will deliver, what is outside the commitment and when your involvement ends.

I can offer: _____ By: _____

_____

My time limit or stopping point: _____

What I am not taking on: _____

_____

### 6 Choose a response you can follow through on

YES ~ “I can deliver ___ by ___. I’ll need ___ from you before I start.”

YES WITH LIMITS ~ “I can help with ___, but I can’t take on ___. I can give it ___ hours.”

NOT NOW ~ “I don’t have room before ___. If that timing works, we can revisit it then.”

NO ~ “Thank you for thinking of me. I’m not able to take this on.”

### A small change can make the difference

A colleague asks you to help with an event. “Help” could mean one afternoon or several weeks of planning. After clarifying, you offer to prepare the guest checklist by Friday, with one round of changes. Registration, vendors and event-day work stay with the organizer.

The useful boundary: a named deliverable, a deadline and a clear stopping point.

### Your decision

☐ Yes ☐ Yes with limits ☐ Not now ☐ No ☐ Clarify first

My response: _____

_____

_____

My next step and when: _____

_____

If the request grows, pause and agree on the change before taking on more.

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