

☀️ Work-Life Balance Self-Assessment Worksheet ☀️

📌 Instructions:

Use this worksheet to evaluate your current work-life balance and identify areas for improvement. Reflect on each section and answer honestly.

◆ Section 1: Work and Personal Life Priorities

📝 **Rate Your Balance:** On a scale of **1-5** (1 = very poor, 5 = excellent), how well do you balance your work and personal life?

💡 **Personal Priorities:** What are your **top three** priorities in your personal life?

📊 **Professional Priorities:** What are your **top three** priorities in your professional life?

⌚ **Interference Check:** Do you feel that work commitments interfere with personal or family time? (Yes/No) If yes, how?

🚧 **Setting Boundaries:** Do you have clear boundaries between work and personal time? If not, what challenges do you face in setting them?

🕒 Section 2: Time Management and Boundaries

🕒 **Work Hours:** How often do you work outside of regular hours? (**Often / Sometimes / Rarely / Never**)

⌚ **Time Limits:** Do you set specific time limits for work and personal activities? (Yes/No)

☕ **Break Frequency:** How often do you take breaks during the workday to reset? (**Often / Sometimes / Rarely / Never**)

🕒 **Time Control:** Do you feel in control of how you allocate your time between work and personal life? Why or why not?


🧘 Section 3: Physical and Mental Well-being

🌙 **Sleep Check:** How many hours of sleep do you get on an average night?


🏃 **Activity Level:** Do you engage in regular physical activity? (Yes/No) If yes, how often?


⚡ **Stress Levels:** How often do you feel stressed due to work? (**Often / Sometimes / Rarely / Never**)


🎨 **Joyful Activities:** Do you have hobbies or activities outside of work that bring you joy? List them.


 **Stress Management:** How do you manage stress in your daily life?

Section 4: Personal and Professional Satisfaction


 **Satisfaction Check:** Are you satisfied with your current work-life balance? Why or why not?


 **Needs Attention:** What areas of your life do you feel need more focus?


 **Change Plan:** What changes can you make to improve your work-life balance?

 **Support System:** Who can support you in maintaining a healthier balance? (**Family, colleagues, manager, etc.**)

Action Plan for Improvement

 **Three Specific Changes:** Based on your responses, list **three specific changes** you can implement in the next month to improve your work-life balance.

 **Set a SMART Goal:** Create a SMART goal related to work-life balance and outline the steps needed to achieve it.

 **Example SMART Goal:** I will leave work by 2PM at least three times a week to spend quality time with my family for the next three months;

Sandwich Years Plan

1. Set Clear Boundaries

- Work boundaries: Define work hours and stick to them as much as possible.
- Home boundaries: Create routines for caregiving and downtime. Don't feel guilty about setting limits with family.

2. Prioritize Ruthlessly

- Identify non-negotiables at work and home.
- Use the Eisenhower Matrix (urgent vs. important) to filter tasks.
- Delegate or delay what isn't essential.

3. Communicate Openly

- Talk to your manager about your situation (when appropriate).
- Ask for flexibility, remote work, or adjusted hours if possible.

- Keep family members informed about your availability.

4. Build in Self-Care (Even in Small Doses)

- Schedule 15–30 minutes a day just for *you*—meditation, a walk, reading, etc.
- Don't neglect sleep, hydration, and proper nutrition.

5. Tap Into Support Systems

- Lean on siblings, extended family, or friends to share caregiving duties.
- Use professional resources like elder care services, daycare, or meal delivery.
- Explore Employee Assistance Programs (EAPs) or caregiver support groups.

6. Get Organized

- Use apps or planners to coordinate calendars, appointments, and tasks.
- Create backup plans for emergencies (e.g., alternate caregivers or transportation).

7. Plan Financially

- Budget for both kids and elder care needs.
- Talk to a financial advisor about long-term planning (e.g., long-term care insurance, college savings).

8. Know Your Rights and Resources

- Learn about FMLA (Family and Medical Leave Act) or any local caregiving policies.
- Explore community services or eldercare programs you may qualify for.

9. Redefine "Balance"

- Some weeks will be work-heavy, others home-heavy—balance doesn't mean 50/50 every day.
- Be flexible with expectations and forgive yourself for not "doing it all."

Bonus: Recommended Sandwich Years Resources

Books:

- *The Sandwich Generation's Guide to Eldercare* by Barbara McVicker
- *Work + Life* by Cali Williams Yost
- *Burnout* by Emily & Amelia Nagoski

Apps:

- Cozi – Family organizer
 - CaringBridge – Coordinate elder care communication
 - Headspace/Calm – Quick stress relief and mindfulness
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Final Reflection

- ♦ What is **one thing** you can commit to changing today to improve your work-life balance?
 - ♦ How will you **hold yourself accountable** for these changes?
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✨ **Reminder:** Work-life balance is an ongoing process. Regularly assess and adjust to ensure that both your personal and professional lives align with your values and priorities.

App Recommendation:

"Habitica" – This app gamifies productivity and habit tracking, helping you set work-life balance goals and stick to them in a fun, interactive way. You can create tasks for work, health, and personal life while earning rewards for completing them.

Alternative: If you prefer a more structured time management approach, **"RescueTime"** helps track how you spend your time on devices and suggests ways to improve focus and balance.

Book Recommendation:

"The 4-Hour Workweek" by **Tim Ferriss** – This book provides insights into optimizing work efficiency, setting boundaries, and designing a lifestyle that prioritizes personal freedom.

Alternative: If you're looking for something focused on mindfulness and balance, **"Boundaries: When to Say Yes, How to Say No to Take Control of Your Life"** by **Dr. Henry Cloud & Dr. John Townsend** is a great read.

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