
Learning Activity 22-1. Introductions

OBJECTIVES

The objectives of this learning activity are to

- become comfortable in the learning environment by meeting others in the class
- discover what work-life balance means to them.

MATERIALS

For this activity, you will need

- flipchart and marker
- red adhesive dots
- blue adhesive dots.

TIME

- 15 minutes

INSTRUCTIONS

1. Explain that this is an opportunity to meet everyone.
2. On a flipchart, list the following areas of work-life balance:
 - career
 - personal development
 - family
 - financial
 - health
 - pleasure
 - service
 - spiritual.
3. Hand out a red dot and a blue dot to each person.
4. Invite attendees to come forward and introduce themselves. Each one should say his or her name, title, and department, and then place the red dot on the line with the area of work-life balance that is taking the biggest percentage of time right now. Each participant will then place the blue dot on the line that he or she would like to focus on.
5. Note the items that have gotten the most dots and allow the participants to see that even if their lives feel out of balance, they are not alone!
6. Today's session will help the learners determine which of these areas need to be balanced in their lives, and it gives them strategies to set goals in those areas and attain them.

Learning Activity 22-2. Self-Assessment

OBJECTIVES

The objective of this learning activity is to

- help participants assess their areas of strength and potential development to balance and assign priorities to personal and professional activities.

MATERIALS


For this activity, you will need

- Assessment 22-1: Self-Assessment
- pencils.

TIME

- 20 minutes

INSTRUCTIONS

1.  Distribute **assessment 22-1** and explain that this is an opportunity for participants to assess their strengths in dealing with work-life balance and the areas they can focus on developing in this session.
2. Remind them that no one has to know their responses unless they decide to share them, so they should be completely honest in answering these assessments.
3. Give them time to complete the assessments.
4. Conduct a debriefing discussion, using the questions provided.

DISCUSSION QUESTIONS FOR DEBRIEFING

- Did you notice any areas that are taking most of your time right now?
- Would you like to share any areas where you'd like to develop work-life balance?

Learning Activity 22-3. Overview

OBJECTIVES

The objective of this learning activity is to

- define work-life balance.

MATERIALS


For this activity, you will need

- PowerPoint slide 22-7
- flipchart and markers.

TIME

- 20 minutes

INSTRUCTIONS

1. Explain that today learners have a rare opportunity to think about what is important to them and to make plans that help them ensure that they have time to spend on those activities and focus areas.
2. Remind the learners that life will always be imbalanced at times. You cannot seek balance by trying to ensure that you spend a certain amount of time on family, health or home issues, spiritual pursuits, and work each day. That's exhausting.
3. Understanding that sometimes professional life will take more time, and that the same is true for personal issues, will help to remove some of the stress that comes with trying to find more hours in the day.
4. Work-life balance is an opportunity to step back, think about what matters, and make a plan so that when time is available people can work on activities that benefit their life goals.
5.  Show **slide 22-7** to illustrate to conflict, and note that every day we have to make choices between professional and personal activities. As they saw during the introductions, most of us don't get to focus on the things that matter the most.
6. Ask the participants to think about what it would be like if their lives were balanced. What would be different? Ask them to give examples of what work-life balance means to them. Would they have more time with their families? Time to go back to school? Would they have more time to relax or be able to do more things around their home? Would they be able to do less? List these on the flipchart.
7. Note the categories and commonalities between their ideas.
8. Ask for the participants' assistance to come up with a definition for work-life balance.
9. You'll be able to note that work-life balance is different to everyone, so the key is that it means the time to focus on the things that really matter to you.
10. That's what the participants will be focusing on today. To determine what's important, they will first look more deeply into what their concept of an ideal life would be.

Learning Activity 22-4. Envisioning Your Ideal Life

OBJECTIVES

The objective of this learning activity is to

- determine participants' goals in the development of work-life balance.

MATERIALS


For this activity, you will need

- Training Instrument 22-1: Envisioning Your Ideal Life
- pencils.

TIME

- 35 minutes

INSTRUCTIONS

1.  Distribute **training instrument 22-1**.
2. Explain to the learners that this is the time to think about how life would be if it were exactly what they wanted. They probably don't give themselves this opportunity very often.
3. Tell them to brainstorm and think about what would be different if life were perfect. Remind them that time and money are no obstacles.
4. Call time after 20 minutes.
5. Ask them to find a partner and discuss the general differences in what their ideal life would be like and what their current work-life balance entails. Allow five minutes for discussion.
6. Note that they've gotten a start toward what is important to them. As they go through the next steps, they'll start to decide which of these is worth working towards and what steps they would take to reach this ideal life.
7. Conduct a debriefing discussion, using the following questions.

DISCUSSION QUESTIONS FOR DEBRIEFING

- Did any of the answers you wrote surprise you?
- Did you discover that you do things that you don't really want to do?
- Have you done anything that would work toward any of these ideals in the past week?
- Do some of these ideals stand out in your mind as goals you'd really like to achieve? Note that those are the ones the participants will start to design paths toward during this session.

Learning Activity 22-5. Breaking for Balance

OBJECTIVES

The objective of this learning activity is

- to recognize the importance of taking breaks.

MATERIALS

- none

TIME

- 20 minutes

INSTRUCTIONS

1. Note that the learners have accomplished quite a bit in this first part of the workshop, but they are probably getting a little tired from sitting for almost two hours. Ask how many of them keep working right through breaks or lunch. Ask for a show of hands for how many have eaten lunch at their desks or eaten a meal standing up.
2. Explain that this isn't unusual, but it doesn't help us keep balance in our lives. Remind the learners what a difference a change in activities can make.
3. Divide the class into four groups.
4. Give each group a question. You can use the questions below or make up your own.
 - What is your favorite relaxation activity?
 - What did you have for breakfast?
 - What was the last movie you saw?
 - When you were six, what did you want to be when you grew up?
5. The learners' task will be to get this information from every person in the room. The challenge is that every other group will be trying to get their question answered by them at the same time.
6. Tell the learners that they will have three minutes to come up with their strategy, three minutes to get the information from everyone, and three minutes to compile their information so they can present it to the rest of the class.
7. Ask if they have any questions.
8. Conduct the activity. Call time in between each of the phases of the exercise.
9. Ask each group to share its findings.
10. Conduct a debriefing discussion, using the following questions.

DISCUSSION QUESTIONS FOR DEBRIEFING

- Do you feel more awake than you did before the exercise?
- Do you take breaks at work?
- What would it do for you if you took a moment to move around or change activities when you realized you were becoming unproductive?

Learning Activity 22-6. Focus Areas

OBJECTIVES

The objective of this learning activity is to

- define work-life balance.

MATERIALS







For this activity, you will need

- PowerPoint slides 22-10 through 22-12
- Training Instrument 22-2: Focus Area Mapping Tool
- Training Instrument 22-3: Setting Goals
- scratch paper and a highlighter for all learners.

TIME

- 50 minutes

INSTRUCTIONS

1. To make the learner's vision of work-life balance real, they should group their activities, interests, and hobbies into a focus area. Focus areas are just related activities that currently consume their time or are part of their ideal life vision.
2. The two categories of focus areas are personal and professional.
3.  Show **slide 22-10**, and note the areas of personal focus.
4.  Show **slide 22-11**, and note the areas of professional focus.
5.  Distribute a copy of **training instrument 22-2** and a sheet of scratch paper to each participant.
6. Explain that the participants will use this to map current and desired activities to focus areas. Remind them that they will probably not finish this process today, but they will have time to get started on each part of the system so they will be able to ask questions and ensure they understand the process before they leave the session.
7. First, the participants will list current activities, as well as activities that they would like to do (using their notes from the Envisioning Your Ideal Life exercise). They can use the scratch paper to brainstorm about additional activities they'd enjoy and to outline the activities of an average day. Allow 15 minutes for them to work on this.
8.  Next, they will group these activities into the focus areas listed on **training instrument 22-2**. Allow them 10 minutes to complete this process.
9. The objective of this process is to complete a list of all of their activities to give them a more realistic view of the demands on their time.
10. Next, they will have 10 minutes to highlight the activities in each focus area and narrow them down to the roles that they consider most important. These may be roles that they want to give more attention to or ones that they feel are vital.
11. The learners may also discover roles they would like to eliminate. They can put an X next to those roles.
12. By the time the learners have completed this exercise, they have developed a better picture of what is important to them and how they would like to spend their time.
13.   Show **slide 22-12** on managing work and life. Distribute a copy of **training instrument 22-3** to each learner.
14. Instruct them to follow the instructions on the form; it will help them determine specific actions to develop the life they want by creating plans to work toward their goals and eliminating activities that aren't beneficial to their lives. Allow 10 minutes for them to work on this.
15. Conduct a debriefing session, using the following questions.

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Learning Activity 22-6. Focus Areas, *continued*



DISCUSSION QUESTIONS FOR DEBRIEFING

- How many things have you done in the past week for the areas you have highlighted?
- Have you discovered any items you want to remove from your current activity list?
- What did you realize from this exercise?

Learning Activity 22-7. Distress or De-Stress

OBJECTIVES

- The objective of this learning activity is to
- determine methods for stress relief and to retain perspective.

MATERIALS


For this activity, you will need

- PowerPoint slide 22-14
- flipchart and markers.

TIME

- 30 minutes

INSTRUCTIONS

1. This activity will allow learners to brainstorm on methods for stress relief and to retain perspective in difficult situations. It will also let them relax and end the workshop on a positive note.
2. Divide the class into four groups. Give each group a flipchart page and a marker.
3.  Show **slide 22-14**. The participants' task is to brainstorm and come up with ways to reduce stress, keep perspective, and to improve the atmosphere when their office is going through stressful situations.
4. Get them started with some fun ideas, such as finding joke partners to share jokes with on bad days, creating a toy drawer, or stretches and exercises. They will present their findings at the end of the exercise. Encourage them to be creative by using a skit or some other unique way to present the information. Give them 10 minutes to complete their brainstorming.
5. Have each group come forward and present its list.
6. Conduct a debriefing session, using the following questions.

DISCUSSION QUESTIONS FOR DEBRIEFING

- Which ideas were your favorites?
- Do you feel more energized after this discussion? Do you see how alternating between analytical processes and more creative activities can help refocus your energy?

Learning Activity 22-8. Putting It All Together

OBJECTIVES

The objective of this learning activity is to

- create a plan to continue to work toward work-life balance.

MATERIALS



For this activity, you will need

- PowerPoint slides 22-16 and 22-17.

TIME

- 15 minutes

INSTRUCTIONS

1. Explain that it's time to ensure that today's session fulfilled the objectives you discussed at the beginning of the workshop.
2.  Show **slide 22-16**. Note the objectives for the day and briefly summarize the ways the class addressed those objectives.
3.  Show **slide 22-17**, which outlines a one-day, one-week, and one-month action plan.
4. Ask the learners what happens if they don't immediately use information they get in workshops. (Most of the time they will respond that they'll lose it.)
5. Explain that this is why you'd like them to practice these principles right away so they will retain the valuable insights they've made today.
6. Go through each item on **slide 22-17**. You can use the items as listed or adjust them to suit your organization or any special areas of work-life balance.
7. Ask for their commitment to do these three activities.
8. Conduct a debriefing discussion, using the questions provided.

DISCUSSION QUESTIONS FOR DEBRIEFING

- What questions do you have about the techniques we've discussed here today?
- Which of these techniques do you feel will be a useful addition to the methods you use right now?

Training Instrument 22-1. Envisioning Your Ideal Life

Think about the following questions to start to brainstorm a vision of your ideal life. Be open to any idea, regardless of how impractical or unrealistic it may be. Also be honest with yourself; you may find that you do some things even though you don't really want to.

Family, Friends, and Relationships
With whom do you want to spend more time?
Whom do you not want in your life?
How would you like your relationships to be?
What are you giving to others?
What are you not giving to others?
Home Maintenance
What would you like your home to look like?
What is most important to you about your home?
Does being at home make you feel relaxed and happy? Why or why not?
Physical and Mental Health
What do you wish you could do, physically?
What would you like your demeanor to be?
What activities would you enjoy?
What do you do for yourself that enhances your physical and mental well-being?
Community Involvement
Do you feel you are contributing to the community?
What volunteer opportunities would be meaningful?

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Training Instrument 22-1. Envisioning Your Ideal Life, *continued*

Intellectual Development
What activities are you enjoying?
What are you learning?
What would you like to learn?
Spirituality
What kind of role would you like spirituality to play in your life? How can you achieve that?
Career Management and Development
What does your career look like?
What does your work schedule look like?
Is your present position fulfilling? Why or why not?
Have your professional interests and focus changed?
Can your current position accommodate those changes?
Networking
What opportunities do you have to network?
To what professional associations would you like to belong?
Mentoring or Grooming Successors
Who will be taking over your position as you advance?
What are you teaching?
Financial Prosperity
How much money would be "enough" for you?
What are your financial goals?

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Training Instrument 22-1. Envisioning Your Ideal Life, *continued*

Other
How do you spend your evenings?
How do you spend your weekends?
How do you spend your vacations?

Training Instrument 22-2. Focus Area Mapping Tool

Identify the roles or function in your life that you either currently participate in or would like to participate in. Create an exhaustive list to gain a better understanding of how you spend your time. Use a separate sheet of paper if you need more room.

PERSONAL FOCUS AREAS

Family, Friends, and Relationships	Home Maintenance
1.	1.
2.	2.
3.	3.
4.	4.
5.	5.
Physical and Mental Health	Community Involvement
1.	1.
2.	2.
3.	3.
4.	4.
5.	5.
Intellectual Development	Spirituality
1.	1.
2.	2.
3.	3.
4.	4.
5.	5.

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Training Instrument 22-2. Focus Area Mapping Tool, *continued*

PROFESSIONAL FOCUS AREAS

Career Management and Development	Networking
1.	1.
2.	2.
3.	3.
4.	4.
5.	5.
Mentoring or Grooming Successors	Financial Prosperity
1.	1.
2.	2.
3.	3.
4.	4.
5.	5.
Other	
1.	
2.	
3.	
4.	
5.	
6.	
7.	
8.	
9.	

Training Instrument 22-3. Setting Goals

GOALS FOR LIFE BALANCE

Based on your discoveries in this session, list goals for your highlighted roles on this form. Give yourself a deadline (for example, within one month, within six months, within one year, and beyond) for this change in your activities. Repeat the process for the activities you want to eliminate.

GOALS	DEADLINE
Personal Goals	
Professional Goals	
Activities to Eliminate	

Assessment 22-1. Self-Assessment

1 = Never 2 = Seldom 3 = Sometimes 4 = Often 5 = Most of the Time

Next to each behavior listed below, circle the number that indicates how frequently you act or respond in these ways.

PROFESSIONAL

- | | | | | | |
|---|---|---|---|---|---|
| 1. I enjoy my career and look forward to the activities I perform. | 1 | 2 | 3 | 4 | 5 |
| 2. I continually learn new things and grow in my position. | 1 | 2 | 3 | 4 | 5 |
| 3. I feel that my workload is acceptable. | 1 | 2 | 3 | 4 | 5 |
| 4. I effectively schedule and assign priorities to my tasks each day. | 1 | 2 | 3 | 4 | 5 |
| 5. I complete most of my tasks each day. | 1 | 2 | 3 | 4 | 5 |
| 6. I have a reasonable amount of stress in my work life. | 1 | 2 | 3 | 4 | 5 |
| 7. I have an understanding of the value of my position in the big picture of my organization's goals. | 1 | 2 | 3 | 4 | 5 |
| 8. I share the vision and values of my organization. | 1 | 2 | 3 | 4 | 5 |
| 9. I use networking and interaction to learn and develop my professional skills. | 1 | 2 | 3 | 4 | 5 |
| 10. I communicate effectively with others in my workplace. | 1 | 2 | 3 | 4 | 5 |
| 11. I share information and help others in my workplace grow and develop their skills. | 1 | 2 | 3 | 4 | 5 |
| 12. I attend training and development opportunities at my workplace. | 1 | 2 | 3 | 4 | 5 |
| 13. I regularly commit my time and energy to professional and intellectual development. | 1 | 2 | 3 | 4 | 5 |
| 14. I know what advancement options are available for me and what I need to do to pursue those opportunities. | 1 | 2 | 3 | 4 | 5 |
| 15. I have a written list of long-term professional goals and the specific action items to achieve those goals. | 1 | 2 | 3 | 4 | 5 |

Total score for this section_____

PERSONAL

- | | | | | | |
|--|---|---|---|---|---|
| 16. I spend quality time with my family and friends on a regular basis. | 1 | 2 | 3 | 4 | 5 |
| 17. I feel emotionally secure and happy in my relationships. | 1 | 2 | 3 | 4 | 5 |
| 18. I have a budget and stay within those guidelines. | 1 | 2 | 3 | 4 | 5 |
| 19. My home is safe, sound, and attractive. | 1 | 2 | 3 | 4 | 5 |
| 20. I regularly participate in leisure activities that I enjoy. | 1 | 2 | 3 | 4 | 5 |
| 21. I exercise and maintain a weight that is appropriate for my height. | 1 | 2 | 3 | 4 | 5 |
| 22. I engage in spiritual and social activities that enrich my life. | 1 | 2 | 3 | 4 | 5 |
| 23. I schedule private time for myself every week. | 1 | 2 | 3 | 4 | 5 |
| 24. I do not bring work home with me. | 1 | 2 | 3 | 4 | 5 |
| 25. I take regular vacations. | 1 | 2 | 3 | 4 | 5 |
| 26. I feel in control of my life. | 1 | 2 | 3 | 4 | 5 |
| 27. I respond appropriately to situations and challenges. | 1 | 2 | 3 | 4 | 5 |
| 28. I take time to maintain my appearance and wardrobe. | 1 | 2 | 3 | 4 | 5 |
| 29. The stress of work issues does not affect my home life. | 1 | 2 | 3 | 4 | 5 |
| 30. I have a written list of long-term personal goals and regularly take actions toward achieving those goals. | 1 | 2 | 3 | 4 | 5 |

Total score for this section_____

Survey TOTAL_____

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Assessment 22-1. Self-Assessment, *continued*

Review both sections to determine the areas in which you would like to make improvements. As you go through today's session, listen to the ideas you hear that will allow you to be more effective in those areas. List those ideas in the spaces provided.

PROFESSIONAL

PERSONAL

Assessment 22-2. Program Evaluation

Name (optional):

Course:

Date:

Company:

Instructor:

Time:

Instructions: Answer the questions below. For questions 1 through 10, circle the appropriate number, using the following scale:

1 = Definitely No; 2 = No; 3 = Not Sure/Not Applicable; 4 = Yes; 5 = Definitely Yes

- | | | | | | |
|---|---|---|---|---|---|
| 1. Did you enjoy this workshop? | 1 | 2 | 3 | 4 | 5 |
| 2. Did you obtain the information that you needed? | 1 | 2 | 3 | 4 | 5 |
| 3. Will the handouts be valuable as job aids? | 1 | 2 | 3 | 4 | 5 |
| 4. Do you feel that the information from this workshop will help improve your efforts to achieve work-life balance? | 1 | 2 | 3 | 4 | 5 |
| 5. Would you like to attend an advanced course on this topic? | 1 | 2 | 3 | 4 | 5 |
| 6. Did the instructor know the subject matter? | 1 | 2 | 3 | 4 | 5 |
| 7. Was the pacing of the class comfortable for you? | 1 | 2 | 3 | 4 | 5 |
| 8. Were questions answered completely and clearly? | 1 | 2 | 3 | 4 | 5 |
| 9. Did the instructor's presentation style keep your attention and interest in the subject matter? | 1 | 2 | 3 | 4 | 5 |
| 10. Would you recommend this program to others? | 1 | 2 | 3 | 4 | 5 |
| 11. What would you have liked to see more of in this program? | | | | | |
| 12. What would you have liked to see less of in this program? | | | | | |
| 13. What is one thing you learned in this program that you will be able to put into practice in the workplace? | | | | | |