

PERSONAL BALANCE ASSESSMENT™

Change is created out of “optimal” anxiety. The purpose of this simple Personal Balance Assessment™ is to do just that — stimulate anxiety without immobilizing you. This is not an inventory that assesses every area of your life or who you are as a person. It is a simple inventory that will help you identify your current level of personal balance in five areas: (a) *physical health*, (b) *mental and emotional well-being*, (c) *managing priorities and personal power*, (d) *supportive relationships*, and (e) *meaning*. With this assessment inherently comes practical strategies for creating more balance in your life. It is meant to help you see any disparity between where you are and where you want to be in relation to personal balance. It is designed to help you focus on your needs and identify ways to meet these needs.

Sometimes in our life, our personal balance system is in better shape than at other times. Often we need to get lost in the forest in order to find a new path. Here are some clues to help you get the most from this self-assessment:

- Being honest with yourself is not easy, but in order to make changes in life, you need to have a clear inventory of where you are today. In some respects, this inventory will test how rigorously honest you are with yourself. We all lie to ourselves in one way or another, as a way to survive in the world. The more rigorously self-honest you are in answering these questions, the more you will gain from the experience of taking this test. You don't need to “look good” or impress anybody. You will not be asked to share your scores with anyone. This is for your use only.
- You may find yourself in conflict or getting anxious as you answer the questions. Remember that anxiety drives the engine of change. Moving you to where your heart wants to be often requires more than a gentle nudge — it sometimes involves a big shove! Respect the anxiety, and know there are no “right” answers or perfect scores (if you score high in every category maybe it means you need to lighten up and be less obsessive compulsive!). Hopefully the anxiety will inspire you to put yourself in the driver's seat of change.
- Many people say they would answer many of the questions differently, depending on whether it is in relation to their work or in their personal life. If you feel there would be a big difference, you may want to take the test twice — once in the context of work and once in the context of personal life. This is okay, but if you see a large disparity between these two, there is an opportunity for some reflection about what this means.
- Some of these questions will bring confusion and anxiety. Just as there are no perfect answers, this is not a perfect test. Even if it's not clear, do the best you can.
- As you take this assessment, you may see many areas in your current personal balance system that could use a change. Rather than overhauling too much right now, focus on *one or two* areas that could use work in the next six to 12 months. Remember, it is better to succeed at one small change, than failing at too many changes!
- Under each of the five areas, there are a few tips/practical strategies. These are suggestions only, to get you started on some new habits.

Physical Health

This area examines the physical aspect of your life — how you are taking care of your body and your physical health.

1: Almost never

2-4: In between

5: Almost always

- | | |
|-----------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| 1 2 3 4 5 | 1) I get a restful seven to eight hours sleep at least four nights a week. |
| 1 2 3 4 5 | 2) I engage in exercise that I find enjoyable at least three times a week, for a duration of 30+ minutes (with elements that increase cardiovascular conditioning, flexibility, strength, and relaxation). |
| 1 2 3 4 5 | 3) I am a non-smoker. |
| 1 2 3 4 5 | 4) I abstain from alcoholic beverages. |
| 1 2 3 4 5 | 5) I am in good health (e.g. including eyesight, hearing, teeth). |
| 1 2 3 4 5 | 6) I appreciate my body. My body is the weight that is right for me. |
| 1 2 3 4 5 | 7) I stay away from caffeinated beverages (including coffee, tea, cola drinks). |
| 1 2 3 4 5 | 8) I eat a balanced diet, low in refined carbohydrates, processed food, and unhealthy fat. |
| 1 2 3 4 5 | 9) I sit down to my meals, eat slowly, and take time to enjoy them. |
| 1 2 3 4 5 | 10) I have ample energy to accomplish what needs to be done in a day. |
| 1 2 3 4 5 | 11) I would describe myself as being in good health (e.g. no chronic conditions, headaches, lingering colds, flu, etc.). |
| 1 2 3 4 5 | 12) I drink at least two litres of water a day. |
| 1 2 3 4 5 | 13) I get regular medical examinations with a health care professional that I trust. |
| 1 2 3 4 5 | 14) My blood pressure is good. |
| 1 2 3 4 5 | 15) I protect my skin from lengthy exposure to the sun. |

Total: _____

If you scored less than 40, there is reason for concern. Here are some tips. You may want to:

- Be honest with yourself about how much sleep you need at night and start getting to bed earlier.
- Take time to assess the kind of exercise that is right for you, and consistently get out and do. This may be simply going for a walk during your lunch hour three times a week, joining a gym, or signing up for a yoga or relaxation class. The only requirement is that it is right for you. Although developing any new habit can be challenging and uncomfortable at first, once you settle in to a routine practice, it should feel enjoyable. If it's not, you won't stick with it. Remember: *the best kind of exercise is the one you do!*
- If you are controlled by any kind of addiction that is destroying your health, get some help immediately: from a 12 Step group or professional counselor in your community.
- Talk to a qualified and knowledgeable nutritionist about a nutrition program that is right for you.
- Take time to reflect on what is blocking you from taking better care of your body.
- Find a person (or a group) who will support you and hold you accountable to start a habit of taking better care of yourself through better nutrition, regular exercise, or just getting more rest and quiet time in a day.

Mental And Emotional Well-Being

This area examines how your mind and emotions are supporting your personal balance system, and some of the choices you are making for having a strong mental attitude and spirit in your life and work.

1: *Almost never*

2-4: *In between*

5: *Almost always*

- 1 2 3 4 5 16) I get strength from my religious and/or spiritual beliefs, where I find peace with myself in the midst of chaos.
- 1 2 3 4 5 17) I am optimistic about my life and my future.
- 1 2 3 4 5 18) I take time to experience the losses in my life and find ways to express my grief.
- 1 2 3 4 5 19) Joy and gratitude come easily to me.
- 1 2 3 4 5 20) It is easy for me to laugh at a joke about myself.
- 1 2 3 4 5 21) I am free of worry about people, places, and things.
- 1 2 3 4 5 22) I am accepting of others.
- 1 2 3 4 5 23) I don't have much interest in tearing down people or criticizing others.
- 1 2 3 4 5 24) I make room in my heart for my own suffering and for the suffering of others.
- 1 2 3 4 5 25) I have an easy time leaving work at work, and home at home.
- 1 2 3 4 5 26) I am a flexible person. I rarely *depend* on rules or policies to deal with demands. (I use my own judgment in decision-making, even though I respect the policies that govern my organization.)
- 1 2 3 4 5 27) I deal with anger in my life in constructive ways (e.g. I don't hurt others or myself with anger, and have a way to let go of resentments).
- 1 2 3 4 5 28) I do something soothing for myself on a regular basis.
- 1 2 3 4 5 29) I experience beauty in my life.
- 1 2 3 4 5 30) I deal with feelings of inadequacy, fear, pain, anxiety, without turning to substances such as nicotine, alcohol, drugs, food, TV, or shopping for comfort and relief.

Total: _____

If you scored less than 40, there is reason for concern. Here are some tips. You may want to:

- Sign up for a meditation or Yoga class.
- Find a religious or spiritual community that supports your spiritual growth.
- Go for some therapy.
- Join a 12 step program that will give you the structure you need to find stability and peace.
- Find a mentor whom you respect, and who is optimistic about their life, and be open to learning about changing your attitude.
- Take time to clean up an area of your life to make room for something new (e.g. let go of an old relationship that no longer supports you, clean out the basement and have a garage sale, get rid of old books that you no longer need, etc.).

Managing Priorities And Personal Power

This area deals with how you manage time and take assertive action. It is about personal power, rather than positional power. It is about an inner sense of self-worth, an ability to let go of that which you cannot change, and put energy into those areas that you can influence. It is about knowing what is important and having the courage to put first things first.

- | | <i>1: Almost never</i> | <i>2-4: In between</i> | <i>5: Almost always</i> |
|-----------|-----------------------------------------------------------------------------------------------------------------------------------------------------|------------------------|-------------------------|
| 1 2 3 4 5 | 31) I am able to organize my time effectively. | | |
| 1 2 3 4 5 | 32) I take regular time for satisfying leisure activities away from work. | | |
| 1 2 3 4 5 | 33) I take time for self-care in the midst of demands and expectations of others. | | |
| 1 2 3 4 5 | 34) I have control over situations at work. | | |
| 1 2 3 4 5 | 35) I take quiet time for myself during the day. | | |
| 1 2 3 4 5 | 36) I work the amount of hours that are right for me. | | |
| 1 2 3 4 5 | 37) I am satisfied with the way I handle demands/stress in my life. | | |
| 1 2 3 4 5 | 38) I feel a sense of balance between my home and work life. | | |
| 1 2 3 4 5 | 39) I can influence the direction of my career and my life. | | |
| 1 2 3 4 5 | 40) It is easy to make time for routine things like birthday cards and phone calls to the important people in my life. | | |
| 1 2 3 4 5 | 41) I have enough structure in my life to manage my moods. I have daily disciplines/rituals that support me. | | |
| 1 2 3 4 5 | 42) If I am unsatisfied with any aspects of my life (including a non-supportive working environment) I take the initiative to change the situation. | | |
| 1 2 3 4 5 | 43) I keep up with appointments, meet deadlines, and keep up with the maintenance of personal possessions. | | |
| 1 2 3 4 5 | 44) I take time to learn and to develop myself, personally and professionally. | | |
| 1 2 3 4 5 | 45) I spend money within my means. My finances are in order. | | |

Total: _____

If you scored less than 40, there is reason for concern. Here are some tips. You may want to:

- Take a time management course (e.g. there is an excellent course offered by the Franklin/Covey organization, phone 1-800-265-6655).
- Find a mentor whom you respect and who is assertive, and be open to learn from them about how assertiveness was achieved.
- Ask yourself: "What can I take out of my day today to make room for what is most important?"
- Develop the habit of 20 minutes a day for reflection/quiet time.
- Take time to identify your top five core values.
- Set aside 30 minutes a week to plan the upcoming week. During this "planning session," schedule in time for each of your top five values.

Supportive Relationships

This area examines the quality of supportive relationships in your life at the present time.

1: Almost never

2-4: In between

5: Almost always

- 1 2 3 4 5 46) I give and receive affection regularly.
- 1 2 3 4 5 47) I have at least one relative within 100 km. on whom I can rely.
- 1 2 3 4 5 48) I have a network of friends to whom I can — and do — depend on.
- 1 2 3 4 5 49) I have at least one friend that I confide in about personal matters, and I meet with this person(s) regularly.
- 1 2 3 4 5 50) I am able to speak openly about my feelings when angry or worried.
- 1 2 3 4 5 51) I have regular conversations with the people I live with about domestic challenges (e.g. chores, money, daily living issues).
- 1 2 3 4 5 52) I enjoy and trust the people I work with and feel supported by them.
- 1 2 3 4 5 53) My input is valued at work.
- 1 2 3 4 5 54) I have allies in my life, people who support and encourage me to bring more of who I am to what I do.
- 1 2 3 4 5 55) I feel accepted and loved by my family/friends.
- 1 2 3 4 5 56) I have a significant companion/"soul-mate" in my life that supports me.
- 1 2 3 4 5 57) I spend high quality time with friends/family.
- 1 2 3 4 5 58) I know that I am important to the people closest to me.
- 1 2 3 4 5 59) I am honest with the people closest to me.
- 1 2 3 4 5 60) I know there are people who are there for me.

Total: _____

If you scored less than 40, there is reason for concern. Here are some tips. You may want to:

- Search for a "breakfast friend" — a person with whom you can share your innermost thoughts, feelings, dreams, and challenges.
- Join a club or social group in your community that supports your values. Search for meaningful connections in social activities.
- Pick up the phone, write a letter, make an email connection, or visit a nurturing person you haven't connected with for a while. Make a habit of reaching out when it is easy to isolate.
- Acknowledge and respect the dependent side of yourself. Give yourself permission to be explicit and open about this and begin to ask clearly for what you need from others.

Meaning

This area speaks to the level of satisfaction and fulfillment you are getting from your life and work right now. You may find this section a bit too “philosophical” for your liking. Please feel free to use your own definitions of the words given, so that it is, in some way, meaningful for you. You may also find that your “work” is separate from your “job.” For example, your real work and passion in life may be the raising of your children. Your “job” is simply a means to fulfill your soul’s desire to nurture and guide your children.

1: Almost never

2-4: In between

5: Almost always

- | | |
|-----------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| 1 2 3 4 5 | 61) I enjoy getting out of bed most days. |
| 1 2 3 4 5 | 62) I usually find that I am so engaged in the activities of my day that I rarely watch the clock. |
| 1 2 3 4 5 | 63) I enjoy being of service to others. |
| 1 2 3 4 5 | 64) My contribution matters. |
| 1 2 3 4 5 | 65) I have identified my life calling and destiny. |
| 1 2 3 4 5 | 66) I have written my own personal mission statement, which gives me clarity and focus as to the purpose of my life and work. |
| 1 2 3 4 5 | 67) My contribution is aligned with my life’s calling and destiny. |
| 1 2 3 4 5 | 68) My life is creative. |
| 1 2 3 4 5 | 69) I experience awe and wonder in my life. |
| 1 2 3 4 5 | 70) If I suddenly received an inheritance of \$1 million, I would continue doing what I am doing. |
| 1 2 3 4 5 | 71) My work is fun. |
| 1 2 3 4 5 | 72) My contribution to the world is not so much my job description as it is the way I do my work. (e.g. even a filing clerk who is joyfully doing their work can make difference in the organization!). |
| 1 2 3 4 5 | 73) I stand up for what I believe in. |
| 1 2 3 4 5 | 74) My work is an expression of my gifts, passions, and dreams. |
| 1 2 3 4 5 | 75) My work, no matter how mundane or routine, makes a difference in the world. |

Total: _____

If you scored less than 40, there is reason for concern. Here are some tips. You may want to:

- Create a “sanctuary” for yourself — a physical place where you can retreat from the demands of the world and connect with your inner self (e.g. a small room that you can petition off in your home, or even a bathroom).
- Take time to reflect on what your heart is yearning for.
- Find a mentor or book that helps you discover your gifts and unique abilities.
- Open up with a trusted friend about your unfilled dreams.
- Invest time and energy in one social cause that you feel strongly committed to.
- Allow yourself the time to learn to be comfortable with being still, so you can listen to your inner self.

GRAND TOTAL (ADD UP ALL FIVE CATEGORIES):_____

As you look at your total score, take some time to reflect on whether the assessment fits for you. Decide on one area that needs attention and, if you were to focus upon it, would bring a deeper sense of wholeness, satisfaction, and fulfillment in your life and/or work.

Take some time to reflect on the meaning of one area being high and another area(s) being low. You may, for example, be “over-focused” on your body, but “under-focused” on showing up for the responsibilities in your life. You may find that your sense of self-worth comes from giving to others, and you don’t take enough time to nourish yourself through quiet time, supportive relationships, or consistent, enjoyable exercise. You may find that it is better for you to have a lower *overall* score, but more balance in each area, than to have a high total score with extremes in each specific area. Ask yourself how you can create more balance in your life, and how you can be more true to your natural essence.

Scores can range from zero to 375

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| 285+ | This score indicates personal well-being and serenity at this stage in your life. You have a good personal balance system in place. You may identify an area that needs some “fine tuning,” but take time to appreciate your current life style, choices, and habits in the area of personal balance. You may also want to reflect on areas of personal balance that need attention but did not get addressed in this inventory.

Note: If you scored in this range, you may also be an obsessive-compulsive person who could benefit by lightening up and perhaps putting less emphasis on discipline and structure. |
| 190-285 | You have some areas in your life with a good system of personal balance. Some areas also need focus and some new habits. Take a close look at one or two areas that need attention now, and focus on them. |
| 90-190 | This score would indicate that you are struggling and could use some assistance in developing a stronger personal balance system. Look seriously at the area(s) in your life that need attention now. |
| Below 90 | You are experiencing some serious difficulties right now in the area of personal balance. Take some time to reflect on whether these difficulties are stemming from a current change in your life and, if so, ask how you can create some structure in your life right now to take better care of yourself in this challenging time in your life. You will probably want to pay serious attention to some immediate action toward balance, in order to rekindle your personal vitality, and fulfillment. Appreciate yourself for being so rigorously honest with yourself. This is the first step to growth. |

Action Planning:

Take an honest look at yourself in each of these five areas. By looking at your scores and reflecting on the meaning of these scores, do a quick analysis. Where are you and where do you want to be? Look at those areas that are going well, and acknowledge your progress in these areas. Pick an area that you are committed to start working on.

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|------|------------------------------------------------------------------|-----------------|
| i. | Physical Health
<u>Current Reality</u> | <u>A Vision</u> |
| ii. | Mental and Emotional Well Being
<u>Current Reality</u> | <u>A Vision</u> |
| iii. | Managing Priorities and Personal Power
<u>Current Reality</u> | <u>A Vision</u> |
| iv. | Supportive Relationships
<u>Current Reality</u> | <u>A Vision</u> |
| v. | Meaning
<u>Current Reality</u> | <u>A Vision</u> |

Take time to do a more thoughtful inventory — paying particular attention to those scores that were the lowest. Review any blocks that may be getting in your way of creating the personal balance system that serves you best. Also, be sure to take time to acknowledge the *strengths* of your current personal balance system.