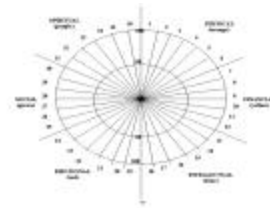


# Life Balance Assessment and Action Planning Guide

## "the Wellness Wheel"



### ***Balance, Balancing, Balanced: to be, put or keep a state of equilibrium***

When our life is in equilibrium there is a balance between opposing forces; opposing forces like the desire to lay on the couch and the need to get up and exercise; the draw of being with friends at a social gathering and the yearning to be alone in nature; the drive to learn and achieve and the requirement to "just" be ourselves, etc.

Each day we make choices about how we live our lives and use our energy. Ultimately this is our choice even at the most painful times such as during illness. Sometimes these choices become unconscious, derived from decisions we took months or even years ago. An example might include the work we do today being the result of career choices made in our teens.

What is clear is that our lives are most satisfying when we have achieved a balance between the social, emotional, intellectual, physical, spiritual and financial/material aspects of who we are. It makes sense to review our life occasionally and then choose to change or re-confirm to ourselves that what we are doing is our conscious choice.

Robin Robertson and Gisele Microys created this instrument in 1998 as a way of helping people assess their current life balance. It has since been used by hundreds of people. The instrument was revised in 2001 based on learning and experience by the authors from facilitating groups and sessions on Life Balance, consulting to organizations, coaching in the workplace, and counselling individuals in psychotherapy.

*"No learning without reflection, no reflection without dedicated time."  
R. Robertson*

#### Instructions:

Read each statement and fill in the corresponding pie shaped section of the wheel to the degree you are achieving this. For example, question one is: "I eat a balanced nutritional diet"; if you feel you are doing this 100%, of the time, colour in all of section one. If you feel you do this, 60% of the time, colour 60% of the section. Do this for all 36 sections of the wheel.

Work on your own - be as honest as possible with yourself. No one else will see this unless you choose to share it.

# Statements

## **THE PHYSICAL SECTION: ORANGE**

1. I eat a balanced nutritional diet
2. I exercise at least 3 times per week
3. Sex is enjoyable and I practice safe sex
4. I use alcohol in moderation, am a non-smoker and avoid street drugs
5. I am generally free from illness
6. I am a reasonable weight for my height

## **THE FINANCIAL SECTION: YELLOW**

7. I have a solid balance between saving for the future and spending for the present
8. My beliefs/values surrounding money are harmonious with my behaviour
9. My extended family/life partners and I have similar money beliefs and practices
10. I use money positively (e.g. little or no gambling, or excessive massing of goods)
11. My significant others would say that I have a healthy attitude towards money
12. I have financial plans for the future

## **THE INTELLECTUAL SECTION: BLUE**

13. I have specific intellectual goals e.g. learning a new skill
14. I pursue mentally stimulating interests or hobbies
15. I am generally satisfied with my vocation/retirement
16. I have positive thoughts (low degree of negativity and cynicism)
17. I would describe myself as a life long learner
18. I commit time and energy to professional and self-development

## **THE EMOTIONAL SECTION: RED**

19. I have a sense of fun and laughter
20. I am able to feel and label my feelings
21. I express my feelings appropriately
22. I have a sense of control in my life and I am able to adapt to change
23. I am able to comfort or console myself when I am troubled
24. Others would describe me as emotionally stable

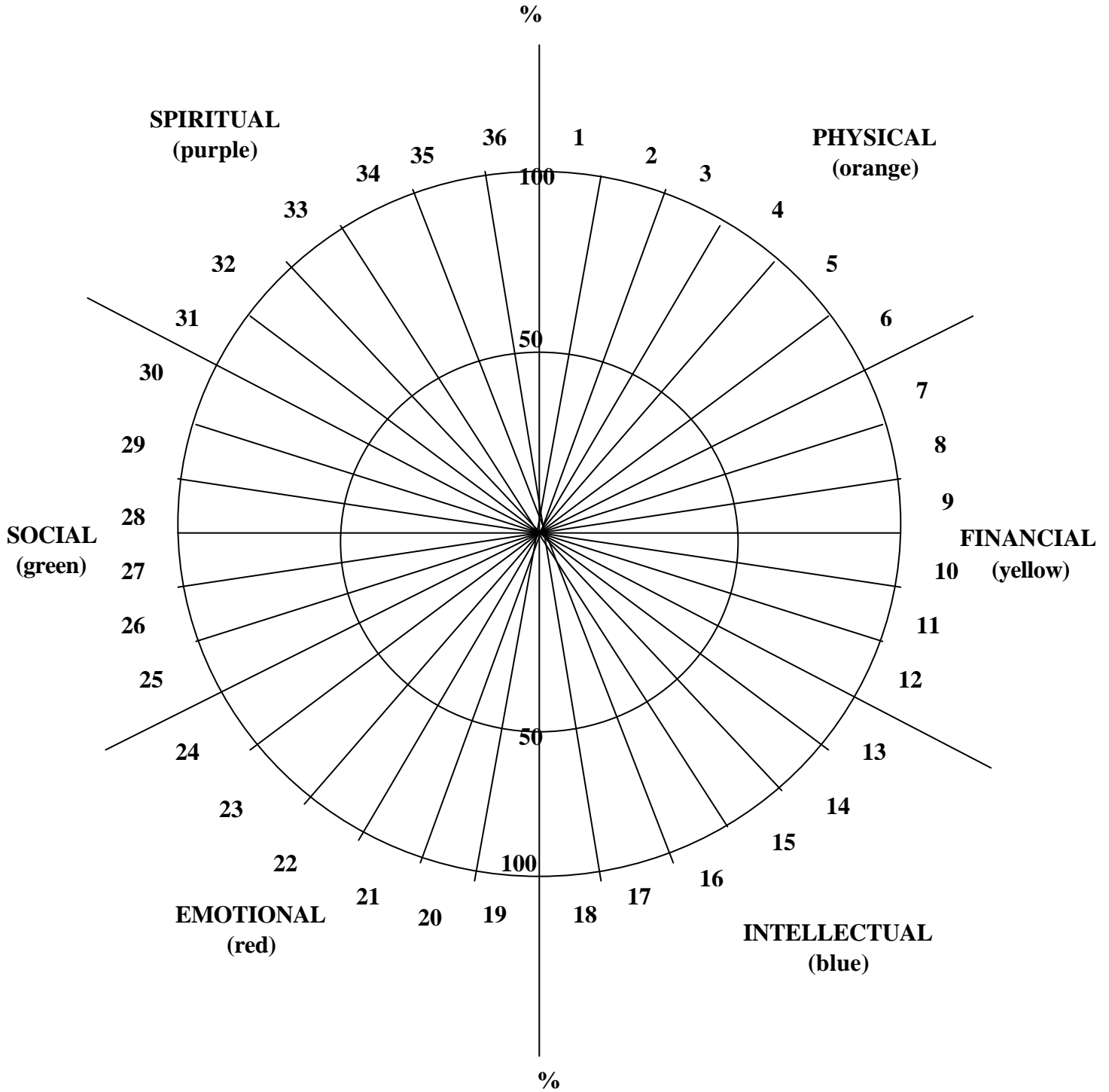
## **THE SOCIAL SECTION: GREEN**

25. I am able to resolve conflicts in all areas of my life
26. I am aware of the feelings of others and can respond appropriately
27. I have at least three people with whom I have a close trusting relationship
28. I am aware of and able to set and respect my own and others boundaries
29. I have satisfying social interaction with others
30. I have a sense of belonging/ not being isolated

## **THE SPIRITUAL SECTION: PURPLE**

31. I practice meditation, pray or engage in some type of growth practice
32. I have a general sense of serenity
33. I have faith in a higher power
34. I have a sense of meaning and purpose in my life
35. I trust others and am able to forgive others and myself and let go
36. Principles/ethics/morals provide guides for my life

# A Balanced Life – The Wellness Wheel



# Action Planning Guide

Today's Date: \_\_\_\_\_

Remember:

- Each person is unique
- There is no "right" or "wrong" wheel
- Responses will vary depending on age and stage of life

Consider the wheel you have created a source of feedback.

Feedback is something we can choose to use or ignore.

**Which section(s) of your wheel has the most colour?** \_\_\_\_\_

**Which section(s) has the least colour?** \_\_\_\_\_

**If this is not the first time you have filled out this assessment, how has the wheel changed? To what do you attribute the changes?**

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**Where could you make investments (time, energy, money) to bring more colour into your wheel?**

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**Other reflections or insights:**

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**Set one goal:**

**As a result of doing this assessment, I intend to improve my life balance by:**

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**My first step will be** \_\_\_\_\_

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**I will share my plans with \_\_\_\_\_ and ask for their support by saying**  
" \_\_\_\_\_ "

**I will review my progress on \_\_\_\_\_ (date)**