YELLOW RIBBON REINTEGRATION PROGRAM®

Finding Balance

Facilitator Guide

FOR THOSE WHO SERVE AND THOSE WHO SUPPORT

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Finding Balance

Facilitator Note:

The following two symbols are used as indicators:
💻 *(computer) indicates it is time to advance the slide on the associated PowerPoint;*
✋ *(hand) indicates there is an exercise associated with the content.*

Essential class content is noted in ***bold****.*

All class handouts are available for download on the YRRP website at www.yellowribbon.mil/cms/event-handout. Unless otherwise specified as online only in the Materials section below, all handouts should be printed for distribution to class participants.

Class Description:

This class covers the importance of goal-setting as a means to increase personal satisfaction and achieve a more balanced life.

Stage:

Pre-deployment, During deployment, Post-deployment

DoDI:

1342.28 DoD Yellow Ribbon Reintegration Program (YRRP)

The content of this class has been developed for the Department of Defense Yellow Ribbon Reintegration Program. The Clearinghouse for Military Family Readiness at Penn State has reviewed the class and is responsible for content management.

Wheel of Life® is a trademark of The Meyer Resource Group, Inc.

Audience:

YRRP attendees

Time:

45 minutes

Equipment:

- Projector
- Laptop
- Pens

Materials:

- Facilitator Guide
- Core Material Checklist
- PowerPoint Presentation
  1. Finding Balance
  2. Objectives
  3. Responsibilities and Obligations
  4. Pleasure and Fun
  5. Are You Balanced?
  6. The Wheel of Life®
  7. Example Wheel
  8. How Can We Achieve Balance?
  9. SMART Goals
  10. Review of Objectives
  11. Finding Balance
- Handouts
  1. Balancing My Life
  2. SMART Goals

Exercises:

1. Balancing My Life
2. The Wheel of Life®
3. Goal-Setting

Objectives:

After completing this class, participants will be able to do the following:

1. Identify opportunities to bring more balance to specific areas of their lives.
2. Set goals for addressing areas of their lives that require more attention.

Introduction

SHOW Slide 1: Finding Balance

Facilitator Note:

Introduce yourself as the facilitator. State your name, military experience or affiliation, and perhaps one additional brief bit of relevant personal information that establishes your credibility (i.e., your professional training or experience).

Please limit your personal introduction to no more than 2 minutes to maximize the time attendees are able to engage with course content, practice skills, and participate in self-reflection activities.

Today, we are going to discuss the journey toward finding balance. By balance, we mean: our "**individual perception that [all activities we do] are compatible and promote growth in accordance with [our] current life priorities**" (Kalliath & Brough, 2008, p. 326). Each of us has competing responsibilities in our lives, including work, family, friends, and social commitments. With so many obligations to balance, it can be easy to lose perspective and neglect ourselves. A lack of life balance may be even more pronounced when we must assume more than our typical share of responsibilities in a specific role, like during deployment. **Working towards balance across the different areas in our lives is important because it may help us to better meet our needs and may contribute to greater overall well-being and life satisfaction** (Grant-Vallone & Donaldson, 2001; Gröpel & Kuhl, 2009; Wayne et al., 2017).

In this class, we are going to complete a series of exercises to help us identify our personal responsibilities and obligations and recognize activities that bring us enjoyment. Then, using a tool called the Wheel of Life®, we will evaluate our personal satisfaction in eight life categories. We will further identify specific areas of opportunity and use goal-setting to increase satisfaction (Klug & Maier, 2015; MacLeod et al., 2008; Steca et al., 2016) and bring more balance to our lives.

SHOW Slide 2: Objectives

By the end of this class you will be able to do the following:

1. **Identify opportunities to bring more balance to specific areas of your life.**
2. **Set goals for addressing areas of your life that require more attention.**

Let's begin by exploring what our personal responsibilities look like.

SHOW Slide 3: Responsibilities and Obligations

EXERCISE 1: Balancing My Life

Facilitator Note:

Handout 1 will be used. The purpose of this exercise for participants to determine where they currently spend their time and recognize the importance of taking care of responsibilities and dedicating time for self-care. Participants will complete the questions at the top of page 1 and the left column of the table. This should take approximately 6 minutes.

Please turn to **Handout 1: Balancing My Life**, and look at the questions on the top of page 1.

For question 1, list your values. For example, for some of you, having a successful career, being a good parent, and being a good spouse may be most important. For some people, community involvement such as volunteer work for youths, for the elderly, or at a religious community may also be important.

PAUSE for 1 minute.

For question 2, record how you will measure your life. In other words, how will you evaluate whether you are reaching your values?

PAUSE for 1 minute.

For question 3, record what is currently most important to you.

PAUSE for 1 minute.

Next, turn to the table on page 1 of your handout. List your current responsibilities and obligations in the appropriate column. These are the *must-dos* in your daily, weekly, or monthly routine. Some examples might include preparing meals for your family, cleaning the house, caring for your children, grocery shopping, working, and performing military service.

GIVE participants 3 minutes to complete the Responsibilities and Obligations side of the table.

PAUSE for responses after each of the following processing questions.

How difficult was it for you to list all of your responsibilities and obligations?

You only had a few minutes to think about your list of responsibilities. How complete is your list?

Who was surprised by the length of his or her list? If so, why did it surprise you?

Did your responsibilities include time for yourself?

SHOW Slide 4: Pleasure and Fun

EXERCISE 1: Balancing My Life (continued)

Facilitator Note:

Handout 1 will be used. Participants will complete the right column of the table. This should take approximately 3 minutes.

You are responsible for taking care of you! Maintaining personal well-being is typically a part of your life that you will neglect in the shuffle of schedules, daily multiple demands, and the pressure to be constantly available via mobile communication devices, such as smart phones (Berkman et al., 2015; Dettmers, 2017; Peeters et al., 2005). It may seem like our rapid pace never slows down (Kleiner, 2014). Please look at **Handout 1**. Under the column in the table labeled Pleasure and Fun, list the things that make you feel good or recharge your energy level. These are not necessarily activities you do on a regular basis. It could be anything that you enjoy. For example, you may enjoy painting, listening to music, playing sports, hunting, or fishing.

GIVE participants 3 minutes to complete the Pleasure and Fun side of the table.

PAUSE for responses after each of the following processing questions.

Were these activities more or less difficult to think of than your responsibilities and obligations?

What are you currently doing to regularly reenergize?

How do your lists compare? Is one longer than the other? If so, which one is longer?

SHOW Slide 5: Are You Balanced?

Sometimes, you may find it difficult to lead a balanced life. All attention might be focused in one direction, especially in times of crisis or during deployment. When this time of intense focus passes, try to refocus your life so you can fulfill and enjoy your roles and responsibilities to the fullest.

Now, let's take a bird's-eye view of your life, using the tool called the Wheel of Life®, so you can identify areas in your life that need attention.

Identify Areas in Your Life that May Require Attention

SHOW Slide 6: The Wheel of Life®

EXERCISE 2: The Wheel of Life®

Facilitator Note:

Handout 1 will be used. Participants will complete page 2. The purpose of this exercise is for participants to identify areas in their lives that need more attention. This should take approximately 5 minutes.

One way we might **divide our lives is into the following eight categories**: **work and career**, **health and fitness**, **family and home**, **finances**, **personal growth**, **social and cultural**, **spiritual and ethical**, **and fun and recreation**.

The wheel on page 2 of **Handout 1** represents these general areas in our lives. For each category on the wheel, read the corresponding questions on the top of page 2. Then, rate your satisfaction in that category on a scale of 0 to 10, and place a dot on the wheel between wheel spokes indicating your rating; 0 in the center is *not satisfied,* and 10 on the outside is *extremely satisfied*. Be honest with yourself. You will not share your answers with anyone else. Once you have rated your satisfaction in the eight categories, draw a curved line between spokes in each topic area.

GIVE participants 5 minutes to complete the wheel.

SHOW Slide 7: Example Wheel

Your wheel may look something like the one pictured on the PowerPoint (i.e., higher in some areas and lower in others).

ASK the following processing questions.

What did your wheel show you?

PAUSE for responses. (Possible answers: there are some areas that need work; there are some things I need to make priorities; I'm out of balance; I actually spend more time on some things than I realized or want to; I'm well balanced in my life according to my

priorities)

Who was surprised by his or her results?

PAUSE for responses.

SHOW Slide 8: How Can We Achieve Balance?

EXERCISE 3: Goal-Setting

Facilitator Note:

Handout 2 will be used. The purpose of this exercise is for participants to identify life areas they feel need more attention and develop SMART goals. Participants will complete the top section, which contains a fill-in-the-blank statement followed by blank spaces 1-3. This should take approximately 5 minutes.

It may be easy to feel disappointed to see that you are not satisfied with some areas of your life, but you are not alone. Being able *to do it all* is nearly impossible. There are only 24 hours in a day, so you should be honest with yourself in what you can realistically accomplish.

Keep in mind that finding balance does not mean that an equal amount of time, involvement, and satisfaction needs to be achieved in all life categories (Greenhaus et al., 2003; Milkie et al., 2010; ten Brummelhuis & Lautsch, 2016). Instead, you will need to **determine what works best for you** because understanding what your own balance looks like may help you enjoy your roles and responsibilities more fully (Davis, 2017; Kalliath & Brough, 2008; Wayne et al., 2017).

If you had many areas in which you were not satisfied, do not try to work on all of them at once. Reflect on what your values are, and prioritize what is important (Davis, 2017). Now, let's move on to an exercise about goal-setting.

Let's see how the wheel can help us set goals. Please turn to **Handout 2: SMART Goals**.

Look at the sentence with a blank line on page 1. From your wheel, pick one area in which you would like to increase your satisfaction, and write that category on the line.

Next, record three things that you believe would be happening in your life if that category was a 10. For example, if you choose the category health and fitness, three things that would be happening in your life to make health and fitness a perfect 10 could include maintaining a consistent workout schedule, eating a healthy and balanced diet,

and maintaining a healthy weight.

Do you have any questions before we begin?

PAUSE for responses.

Please complete the top of the handout.

STOP the exercise after 5 minutes.

Can you see how the wheel can help you identify areas on which to focus? Now, let's look at how we can take the area you chose to focus on and identify some goals.

The Value and Techniques of Goal-Setting

SHOW Slide 9: SMART Goals

EXERCISE 3: Goal-Setting (continued)

Facilitator Note:

Handout 2 will be used. The purpose of this exercise is for participants to review the list of tips for achieving balance and develop 1-2 SMART goals in the spaces provided. This should take approximately 5 minutes.

Having goals can help you achieve your desired outcomes (Epton et al., 2017; Klug & Maier, 2015). **Written goals can be an effective tool because the act of writing down goals makes them more concrete, which makes it easier for us to commit to them** (Matthews, 2015). You may want to develop both concrete short-term and long-term goals to help you sustain the behaviors you choose to achieve over time (Steca et al., 2016).

What time frame would you consider long-term for goals?

PAUSE for responses. (*Possible answers: over 5 years; lifetime*)

What time frame would you consider for mid-term goals?

PAUSE for responses. (*Possible answers: 1-5 years*)

How about for short-term goals?

PAUSE for responses. (*Possible answers: the next day; week; month; up to 1 year*)

To get started, first identify a long-term goal that you want to achieve. For example, your long-term goal may be to improve your physical health. To reach this long-term goal, it may be easier to break down the goal into smaller targets that you can achieve. We will go through an example of this in a minute.

With this plan in place, try to do something to move toward your goal every day. Revisiting the Wheel of Life® periodically allows you to reassess your life and make plans to address those areas that lack balance.

What would happen if you tried to make every category on your wheel a 10 at the same time?

PAUSE for responses. (*Possible answers: would get overwhelmed; might quit; would spend a little time on everything, but no quality time on anything*)

Resist taking on more goals than you can handle. Focus on just one goal at a time! Decide what a manageable number is for you.

Remember, we want to set SMART goals. How many of you have heard of SMART goals?

GET a show of hands.

SMART is a popular acronym that is used to help us remember five criteria for creating goals (Bjerke & Renger, 2017).

The S stands for Specific. You want your goals to be specific.

Specific means that the goal states exactly what you want to accomplish, and it focuses only on one particular area or aspect. If I stated, “My long-term goal is to improve health and fitness,” this is not specific. In the process of breaking it down into smaller targets, I can make it more specific. For example, “my goal is to work out more” is more specific. Use the focus area you wrote down in the first part of the exercise to help make your goals more specific.

The M in SMART stands for Measurable.

A measurable goal is one that you can monitor to determine your progress. You can tell when it is achieved. This helps you remain accountable in working toward that goal. Using the previous example “to work out more” is specific but not very measurable. If you added, “my goal is to work out more by going to the gym every day,” then you have a measure by which you can tell if you met that goal.

The **A in SMART stands for Achievable** or Attainable.

PAUSE for responses after each of the following questions.

Do you think going to the gym every day is Achievable?

What if you made the goal "to go to the gym at least three times a week"? Is that achievable?

Goals should be reasonably achievable considering the time, talent, and resources that are available to devote to the goal.

The **R in SMART stands for Relevant. This means that the goals you set should be applicable to your current life situation.**

What could keep you from going to the gym three times every week?

PAUSE for responses. (*Possible answers: things come up that prevent us from getting there; circumstances change; lose interest; life just happens*)

So, you need to make the goal relevant by examining your current life situation and determining if you can make it happen.

Finally, once your goals are Specific, Measurable, Achievable, and Relevant, you want them to be **Time Bound. This means you should set a timeframe or deadline for when you will accomplish your goal.**

Is the goal of going to the gym at least three times a week for the next 3 months time bound?

PAUSE for responses. (Possible answer: yes, because there is a set 3-month period of going to the gym)

Sometimes, you set goals that you want to accomplish in a specific amount of time, like saving money for a new TV, right? Other time-bound goals are meant to be maintained even after the goal is accomplished. For example, you probably do not want to stop going to the gym at the end of 3 months after you met your goal.

What you are really trying to do is to change your habits. So, if you go to the gym for 3 months, you will probably see a difference in how you feel, and it may be easier to maintain that habit of going to the gym for a long time. By making these changes and maintaining them, you may be able to increase the balance in your life.

So, let's review what we just discussed.

PAUSE for responses after each question.

Have we met the criteria of SMART with the goal of going to the gym at least three times a week for the next 3 months?

Would achieving that goal help improve the satisfaction in the health and fitness category?

How will setting SMART goals help balance your life?

PAUSE for responses. (*Possible answers: they help keep us focused; keep things in perspective; gives you something to keep working toward*)

We spend the majority of our time journeying toward our goal and only a small amount of our time actually attaining it. Remember, enjoy the journey – it will make getting to your destination more pleasant. When you achieve your goal, give yourself a pat on the shoulder, and celebrate!

At the bottom of page 1 on **Handout 2**, you will see a list of tips that you may be able to use to help you achieve balance in your own life. Please read this list. Then, on page 2 of your handout, write down one or two SMART goals that will help you improve the category you chose on the top of the handout. When you go home, you will already have a goal to begin bringing more balance to your life!

PAUSE for 5 minutes to allow participants to write. The following tips for achieving balance (Davis, 2017) are listed on the handout:

- *Draw a line.*
  - *Set boundaries. Say, "no."*
  - *Practice self-care to improve overall well-being.*
  - *Set realistic expectations for yourself.*
- *Be present.*
  - *Don't be afraid to unplug.*
  - *Be attentive at home, at work, or during your free time.*
- *Practice mindfulness and self-compassion.*
  - *Recognize when you are feeling guilty about not being able to do it all.*
  - *Accept those feelings and reflect on why you are feeling that way.*
- *Create (and stick to) a daily routine.*
  - *Sleep 7-9 hours.*
  - *Exercise.*
  - *Engage in family time, including meals.*
- *Recognize there are tradeoffs.*
  - *Focusing on an important goal may deprioritize less important ones.*
  - *Compromise on certain aspects in life to achieve what is necessary.*

- *Be flexible.*
  - *Adapt to unexpected situations.*
  - *Shift priorities as needed.*

Summary

SHOW Slide 10: Review of Objectives

Today, you had the opportunity to evaluate your satisfaction in eight areas of your life to determine which areas might need more attention. Then, you started to create more balance in your life by setting SMART goals. Working towards these goals could help increase your satisfaction in the areas you identified as needing more attention.

Now, my challenge to you is to go ahead and set two or more SMART goals when you get home. Remember to balance your goals among short-, mid-, and long-term goals.

What questions do you have about finding balance?

PAUSE for responses.

Let's see if we met our objectives:

1. **How could you use the Wheel of Life® to help you achieve and maintain balance?** *PAUSE for responses*.
   (Possible answers: use it to identify specific areas of your life that need more balance; set goals for addressing areas of your life that require more attention; revisit the wheel periodically to evaluate how satisfied you are in each area)

2. **What are some of the characteristics of SMART goals?** *PAUSE for responses*.
   (Possible answers: specific; measurable; achievable; realistic; time bound; written; balanced among short-, mid-, long-term)

SHOW Slide 11: Finding Balance

Thank you, and please complete your evaluation for this class.

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