

Organizational Review Worksheet

BALANCE

DESCRIPTION: In a work environment with positive balance, employees are supported to manage the demands of work, family and personal life.

What are the potential benefits of effectively addressing balance?

- Greater satisfaction and morale
- Reduced stress and burnout
- Enhanced performance and productivity
- Reduced absenteeism and disability

What information may be helpful to refer to or collect?

- Accurate records of time worked, including outside of regular work times
- Data on use of vacation time and accrued time off
- Absenteeism and disability data
- Data on benefits utilization
- Complaints or grievances related to time off
- Current policies related to flexible working arrangements and time off

Consider the extent to which the following happen:

- Flexible work arrangements such as work from home, part-time work, and job sharing
- Opportunities to choose between overtime or time off
- Mechanisms to ensure daily breaks are taken
- Requirement to take vacation time away from work
- Benefits for employees and their families that address both mental and physical health
- Supports such as access to daycare, elder care, therapy and health education
- Positive work-life balance modelled by management

Please respond to the statements below with respect to your workplace:	Always	Often	Sometimes	Rarely	Never
1. All employees are encouraged by their direct leader to take their entitled breaks.					
2. All employees can reasonably balance the demands of their work and personal life.					
3. Our management genuinely promotes work-life balance.					
4. All employees can talk to their supervisor when they're having trouble maintaining work-life balance.					
5. All employees feel supported in their workplace when they're dealing with personal issues.					
6. No employees are experiencing burnout.					
7. Work, including remote work, doesn't cause employees' home life to suffer.					

Do issues related to balance present a greater risk to particular groups of employees? For example, newer employees, certain job roles such as supervisors, shift-workers, immigrants, remote workers, etc.

What are the strengths in your workplace? What do you already do well and want to continue to do in terms of balance?

What currently gets in the way of employees finding work-life balance? How can this be addressed?

If there is a difference between the organizational review and the survey results, what may be contributing to the difference in perception between employees and the leaders who did the organizational review?

Is further action required in this area? Yes No

If yes, see [Evidence-based actions](#) for balance.