

Energy and Capacity Weekly Check

Use the method

Compare available time and self-reported energy with the work you have accepted. Use this before planning a demanding week. The result is a realistic commitment list, protected boundaries, and an early workload adjustment. This is a private planning tool, not a health assessment or a measure of an employee's worth or performance.

- 1. Look back briefly.** Describe energy and concentration in your own words and note which recent demands were difficult. You may skip any personal detail. Use observations rather than diagnosing a cause.
- 2. Map fixed demands.** List work, caregiving, appointments, travel, and other fixed commitments. Reserve time for rest and basic needs rather than treating every unscheduled hour as capacity.
- 3. Estimate usable work time.** Calculate scheduled work hours minus fixed work commitments and a chosen allowance for interruptions. This planning estimate is not a requirement to fill every remaining hour.
- 4. Compare accepted work.** Estimate effort for priority tasks and compare it with the available time. Mark uncertainty and deadlines. Consider which tasks need your strongest concentration.
- 5. Make one adjustment.** If work exceeds the estimate or feels unsustainable, reduce scope, defer, delegate with agreement, or renegotiate a commitment. Name the affected person and communication date.
- 6. Check midweek.** Review what changed and revise the plan. If tiredness or other concerns persist or interfere with daily life, seek appropriate professional support rather than relying on the worksheet.

Worked example

Illustrative week: 30 scheduled work hours, 12 hours of fixed meetings and service coverage, and a chosen 4-hour allowance for interruptions leave an estimated 14 hours for planned task work.

The operator has 18 estimated task hours. Energy has felt low in the afternoon, so scheduling all 18 hours is unlikely to work. The operator selects the most important 10-hour delivery and a 4-hour administrative task.

A 4-hour optional cleanup is deferred with the stakeholder's agreement. Two concentration blocks are protected in the morning. The operator does not remove rest or caregiving time to make the arithmetic fit.

At the midweek check, an urgent 2-hour request arrives. The operator asks which existing commitment should move and records the revised decision. Self-reported energy notes stay private.

Before you put it to work

- ☐ Fixed demands and protected personal time are visible.
- ☐ Effort estimates and available hours use the same period.
- ☐ A mismatch produces a decision and communication.
- ☐ Personal observations are optional and kept private.

If the problem keeps returning

If overload persists, inspect commitments and authority to change them. A more detailed tracker cannot create missing time; involve the person who can change priorities or provide support.

Connect the tools

Use PW-02 for focus blocks, PW-06 for workload conversations, and PW-08 for a small personal dashboard.

Working worksheet

Name or team _____ Date _____

Scope and setup

Week, private record location, available work window, fixed demands, and midweek check date.

Reusable record

Commitment	Estimated hours	Due date	Energy or focus need	Keep change defer

Duplicate rows or this worksheet for additional records.

Use your own records. The examples on page 2 are illustrative. Continue on a duplicate worksheet when you need more space.

Personal observations are optional. Keep this worksheet in a private location and share only the work decision you choose to share.

Complete and review

Capacity calculation

Scheduled work hours minus fixed work demands minus chosen interruption allowance; uncertainty and protected boundaries.

Adjustment and communication

Mismatch, chosen change, affected person, decision owner, message date, and agreement.

Midweek result

Actual demand changes, observed capacity, revised commitments, support needed, and next check.

Review after use

Which commitment needed adjustment? _____

What estimate was unrealistic? _____

What boundary will you protect next week? _____

Next action _____ Owner _____ Due _____