

# Finding BALANCE



POCKET GUIDE

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ELIZABETH CASSON TRUST



# Finding BALANCE



Welcome to Finding Balance. One of a series of pocket guides created to support the wellbeing of occupational therapists in their first year of practice.

Year One: Thriving not Surviving is a grass roots initiative. Over the course of several months, we engaged with many occupational therapists in their first year of practice and asked a core question, “How has the first year of practice impacted on your wellbeing?” The answers have informed the pocket guide that you are now reading.

As an occupational therapist you will already have a range of excellent tools that you can use to support you. Think of this as an addition to your toolbox. A kind voice that reminds you to, ‘Stop for a moment and take some time to focus on yourself because your wellbeing is important’. It is designed to not only make you stop and think but, as importantly, take action. All of the guides are designed so that you can dip in and out and pick the tools which resonate most with you.

The tools are designed to support your wellbeing but are not a replacement for specialist support if you are experiencing significant challenges to your mental health. If this is the case, you are advised strongly to seek support via your GP or through your occupational health department.

By reading the insights of other newly qualified occupational therapists we hope that you get a sense that others are having similar experiences. You are not alone. You are part of a community finding its feet and sense of identity, a process which can feel a bit like being on a roller coaster but ultimately is a great ride.

# Introduction

You may be wondering why we are writing about balance for a profession that prides itself on promoting occupational balance? One of the things we learnt from talking with first year practitioners was that, whilst they were good at promoting balance to other people, they were not so great at maintaining it within their own lives.

Occupational balance is still something I find a challenge. I would say I probably don't practice what I preach on this sometimes, but I do know its value.

Different reasons were given for this: adapting to working full-time; reduced energy to sustain hobbies and social activities; a perceived lack of clinical knowledge meant evenings spent reading and doing prep; friendship groups changed reducing opportunities to socialise; the challenge of creating healthy boundaries between work and personal life.

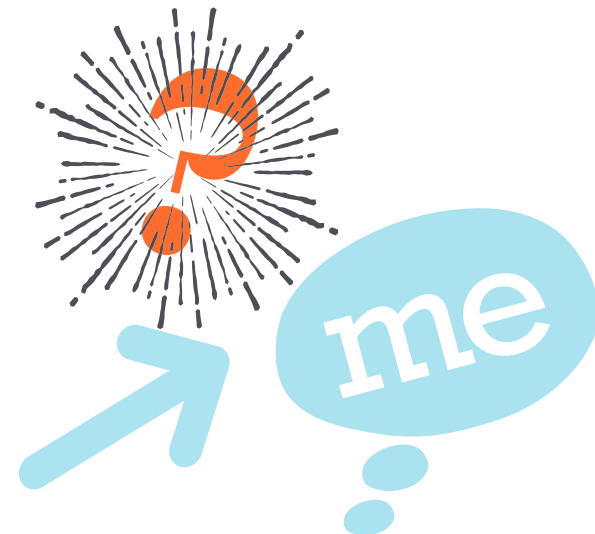
How do you switch off from work after your shift? For me, this took time and I think it is a skill which comes with time and experience.

I was told to enjoy my weekends and time off and not to worry about my clinical caseload when not work for there was nothing I could do. It had such a positive impact on my wellbeing and work-life balance. Thank you for the wisdom.

We all experience periods of intense activity when a specific aspect of life takes over, such as seeking somewhere new to live whilst simultaneously starting a new job. The concern comes however when a temporary imbalance becomes the norm.

As an Occupational Therapist, I spend my life helping others but rarely engage in the occupations that mattered to me. But during this crisis, I've reflected on my own engagement with various interests, hobbies, and activities of daily living. Without cooking, knitting, running or reading, my emotional well-being would be depleted right now but thankfully, I've been able to survive.

It shouldn't take a lockdown to make us engage in the occupations that matter to us. We are who we are because of the things that we do, and it will be these things that will carry you through your first year of practice. It may feel impossible to do anything additional to your new routine but the one thing that has made the biggest difference to my well-being is being able to participate in the things that I love.



# What do we mean by balance?

An interesting question to ask an Occupational Therapists, and one that is reflected back to you.

When you learn about occupational balance at University, you begin by understanding that occupations are defined by literally anything that occupies your time; showering, working, singing, studying, cooking, drawing, dancing, the list goes on and on. Once you have a grasp on that, you explore it further by understanding the meaning and purpose of each of these occupations to you and how they make you feel.

Your well-being depends upon how you engage in and the satisfaction you gain from each experience. However, as you know, occupations constantly interact within a dynamic balance. The balance can shift and change on a larger scale across your first year of practice.

There are several ways to view balance: You can see it as being sufficiently occupied with your time being neither too full, nor under occupied. You may also view balance as the quality of your occupations, rather than the quantity. Regardless, they must work in harmony to facilitate a healthy balance.

Within the context of University, your time was structured and often deadline driven; the deadline ends and your balance shifts. You are able to find time to do tasks that fell by the wayside whilst you focused on work. However, your first year of practice can be overwhelming, as you are constantly learning, trying to improve and trying to know everything. So, when do you reach that “deadline” and allow the scales to tip back towards a balance? When do you allow yourself and your mind to rest?

For a moment, let go of all the theory you have learnt. In this moment in time if you were to describe a balanced life for yourself. . . what would it look like? How do the different aspects of your life come together to reflect what is important to you right now, in a healthy and fulfilling way?

'At this moment in time being occupationally balanced would mean...'

# Getting Fierce about Self-Care

How hard are you prepared to fight, to ensure you maintain an occupational balance that promotes your well-being? Using the words well-being and ferocity in the same sentence may jar, but there are definitely times when you are required to become fierce about your intentions.

Logically, you understand that your needs are as important as everyone else's yet it is too easy to constantly put your needs at the bottom of the pile. Maybe you're the kind of person who, when something needs doing, finds themselves volunteering whilst everyone else is avoiding eye contact? If you are asked directly to take something on, do you find it hard to say 'no' and then wonder why you are working evenings and weekends? Maybe you're a people pleaser. If this all sounds familiar what does this say about the value you place on your well-being, needs and time?

*When we practice fierce self-care, we feel it powerfully, deeply and intensely. We grow closer to our passions and our calling, to the frailties, strengths and the surprising resilience of our physical selves. We become ardent, enthusiastic, eager, and committed because we know in our core that this fierce caring is needed not only for ourselves but also for those we love and for the world.*

Nancy Shapiro

To truly maintain a healthy balance there are times when we need to assert, 'I matter as much as everyone else.'

Thinking back over the last few weeks, how often have you given up your time and energy to meet the needs of someone else, at the expense of something you had planned to do for yourself?

What made you do this?

A fundamental thing to remember about the first few months of practice: whilst it can be exciting and energy promoting, it can also be tiring and stressful. This is a time when you need to ensure that you are doing all you can to maintain your occupational balance and look after your well-being.

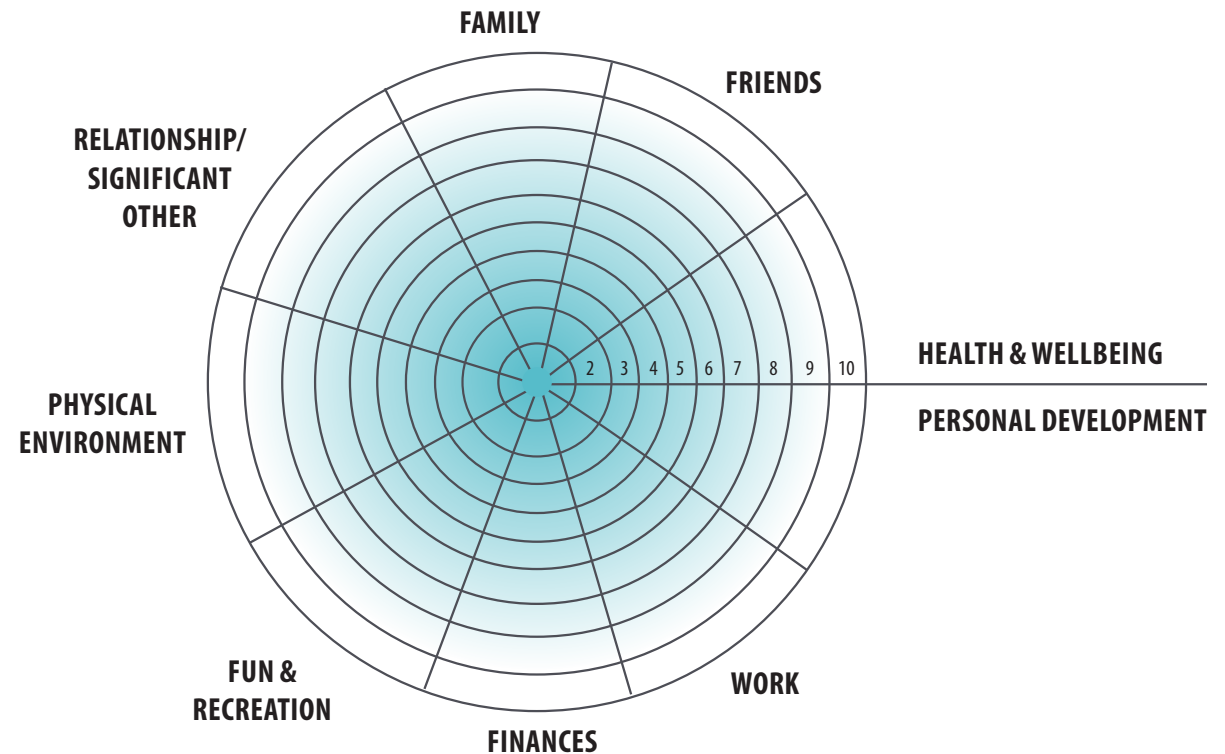
*If one wants to climb mountains, one must have a good base camp: a place where there are shelters and provisions, where one may receive nurture and rest before one ventures forth again to seek another summit. Successful mountain climbers know that they must spend at least as much time, if not more, tending to their base camp as they do in climbing mountains, for their survival is dependent upon their seeing to it that their base camp is sturdily constructed and well stocked.*

Morgan Scott Peck. *The Road Less Travelled.*

# The Well-being Balance Wheel

As you know, balance is evolving as needs and priorities constantly shift. It is therefore important to check in on your balance from time to time, during your first year of practice. The well-being balance wheel is designed to enable you to check in with how satisfied you are with different aspects of your life and importantly to become **intentional** about bringing about change (if you notice an important imbalance.)

1. Seeing the centre of the wheel as 1 (not at all satisfied) and the outer rim as 10 (extremely satisfied), **mark your satisfaction with each area of your life on the line.** Then join up the marks. What does it look like? Probably like a spiders web.
2. When you look at how it maps out, what does this tell you about your level of satisfaction with different aspects of your life?
3. As this activity is about action and bringing about change, when you've completed the wheel, is there an area that you would like to improve your satisfaction with? It doesn't have to be the one with the lowest score. There may be an area that you would like to move from a 7 to an 8, or 8 to 9.
4. The final stage of this process is to make a commitment. This isn't some vague concept such as, 'I'm going to eat more healthily'. It must be specific and time sensitive i.e. 'In the next week I am going to eat at least 3 vegetarian meals'.



The area I am going to focus on is

The possible ways in which I can increase my satisfaction are (Try to be really creative and take time to explore a range of options before setting your intention.)

My intention over the next week is to.....

Watch out for the "OOPS Syndrome, Over Optimistic Planning Syndrome. Be realistic about what is possible, given the life demands on you currently.

If you find sticking to your commitments a challenge, it might be helpful to set up some accountability by asking a friend, partner or family member to check in with you at the end of the week.

However, a note of caution here, be careful to choose someone who will be firm but understanding when/if you waiver. Having someone who will call you every day to see how you're doing, or nag you all the time, is not an effective form of support.

# Gift Goals

The concept of setting gift goals has been developed by Tara Mohr. You can read more about them as part a process of setting goals which you are likely to achieve here:

[www.taramohr.com/inspiration/if-you-wish-you-had-more-self-discipline](http://www.taramohr.com/inspiration/if-you-wish-you-had-more-self-discipline)

Many of the goals we set ourselves are informed by a sense of 'I should' rather than a sense of, 'I'm doing this, because it is important to me and aligned with my values'. From the stance of 'should', it's likely that our goals are driven by our inner critic telling us we need to shape up in some area of our life or conform to perceived social norms. We are starting from the point of, 'I've got to' or 'I need to be more disciplined with myself' rather than, 'I want to'.

A gift goal is the complete opposite. Imagine your goal coming in a lovely package with a joyous bow tied around it. It is something you are doing as a gift to yourself because it is important to you. The label would read .... 'In this parcel I am giving myself the gift of...'

The gift should be something aligned with your values, a way of honoring something that is important to you.

Here are a few examples:

Should Goal	Gift Goal
I look terrible, I should lose weight.	By eating more healthily, I'm honouring my body through keeping it as healthy and strong as possible.
I should stop spending so much time on social media.	By reducing time on social media, I'm giving myself the gift of being able to do more .....
I should make more time to connect with friends.	By connecting more with friends I'm gifting myself their company and time together.

This an interesting way of thinking and formulating your personal goals, especially when you are considering balance and giving priority to your well-being. It is so easy for intentions around personal well-being to be informed by "should" goals driven by your inner critic.

Try it out: set yourself a gift goal and see how it feels to remind yourself of the gift rather than the 'should'.



# Saying Yes & No

Life can become imbalanced when we overcommit ourselves and don't pay attention to setting personal boundaries. The word "boundary" might feel rigid and constraining but you need to consider this as a strategy designed to protect and support your well-being.

Have you ever given much thought to your boundaries (or setting them)? Are they similar to a broken-down wall or an open gate with an 'All welcome here' sign on it?

A fundamental question to reflect on is, 'how much do you value and respect your time?' Is it something that you value highly or is it up for grabs to anyone who wants a share?

Maybe at work, because you want to demonstrate your enthusiasm, you say, 'yes' to something which then puts pressure on other aspects of your working day. Perhaps you have planned to do an exercise class and a friend contacts you to ask for a meet up, but this is at the same time as the class. You then choose to say yes to your friend because you don't want to let them down. Bang goes your exercise class.

Saying 'no' can be tough and takes us back to the notion of fierce self-care. For many of us, our reluctance to say 'no' is due to wanting to be perceived as willing, friendly, compassionate, 'If I say 'no' they will think I've let them down, 'I'll not be seen as part of the team', 'They will think I'm lazy' etc. This "people pleasing" way of acting does not serve us well when it comes to respecting our own needs and priorities.

This exercise is designed to encourage you to take a pause before making a commitment. The exercise also assists you to think about the pros and cons of a request to do something. For instance, recognising there are only 24 hours in a day and when we say, 'yes' to something, we are also saying, 'no' to something else. For example, if I say yes to spending an hour on a phone call with a friend what else am I ruling out of doing for that hour?

**A short version of this exercise is designed to help you do a quick check in with two questions:**

In saying yes to this I am saying yes to...

In saying yes to this I am saying no to...

It encourages you to think a little more carefully about what you give priority to.

Sometimes you might be asked to take on a larger commitment and this is an extended version of the exercise.

If I make this commitment...	
<b>BEING</b>	<b>DOING</b>
I am saying yes to being...	I am saying yes to doing...
<b>BEING</b>	<b>DOING</b>
I am saying no to being...	I am saying no to doing...
By making this choice I will become	

Remember, how people feel about you saying no is their responsibility not yours. Your responsibility is to communicate effectively why you are saying no. If you find it hard to say no, take a look at the pocket guide to Quietening your Inner Critic. It is highly likely that, if you are saying yes to something that you don't want to do, your inner critic has a role in this decision.

## Let Yourself Rest

If you're exhausted, rest

If you don't feel like starting a new project, don't.

If you don't feel the urge to make something new just rest in the beauty of the old, the familiar, the known.

If you don't feel like talking, stay silent.

If you're fed up with the news, turn it off.

If you want to postpone something to tomorrow, do it.

If you want to do nothing, let yourself do nothing today.

Feel the fullness of the emptiness, the vastness of the silence, the sheer life in your unproductive moments

Time does not always need to be filled.

You are enough simply in your being.

**Jeff Foster**

# Creating Boundaries Between Work and Home

The central focus of this exercise is the negative impact of 'dragging the mindset of our day' into our home life and family/social interactions. It is informed by a TED Talk given by Dr Adam Fraser, Never Take a Bad Work Day Home Again.

You've had a challenging day at work and when leaving work, you are still in 'work mode'. Maybe you're mulling over an interaction with a client, thinking about a report you didn't have time to write or a meeting that didn't go as planned.

Here's what some people shared with us.

*I still find it difficult to switch off at the end of the end as I know others do too but we're only human!*

It can be very hard to separate work from home especially if you live on your own and don't have someone to talk to or do something with when you get home.

The blurring of boundaries between work and home is made even more likely by the pervasive nature of technology. We literally carry our work around with us in the shape of our mobile phones or computers.

## HOW TO CREATE THE 'THIRD SPACE'

The third space is, in effect, a pause. It is the space between leaving work and arriving home. A space to make the transition from one mindset to another. It does not ignore the fact that you may choose to work in the evening. It does, however, assert the need to create a period of being present at home, especially after a challenging day, before restarting work later.

### There are 3 steps to creating a third space:

#### 1. Reflect on the day

Ask yourself: What do I want to celebrate about the day? What have I achieved? What would I like to build upon tomorrow?

Questions like these, are designed to support you to think in a positive mindset rather than negatively. It also encourages you to explore what you can learn from the day, which in turn will help improve your knowledge and learning.

If your journey home involves a commute, spend the first part of the journey focusing on this.

#### 2. Reset

The second step is designed to help you focus on how you want to appear when you walk through your door at home. If you live with other people, are you going to slip immediately back into work

mode by reliving your day or checking your emails straight away? Set an intention about how you want to 'arrive' home e.g. feeling calm, happy to be home, playful.

#### 3. Rest

The final step is about doing something that makes you present at home. It may be simple tasks such as changing out of your work clothes, doing some exercise, playing some music. It may be time for yourself or it may be quality time spent with a partner or children. Whatever feels good for you that isn't work related, is crucial for rest.

These 3 steps don't have to be time consuming... you can spend as little as 15 minutes in your third space.

The third space is something to get playful with and intentional about. Think about what your third space would look like. Is it a drive or commute home listening to some great music or reading a book? Perhaps time to engage physical exercise or a creative activity? Your third space may be about becoming present with the rest of the family, so consider about how you would like to greet them and what you would like to do together. Here are some examples of what people told us they do. to

*For specific patient scenarios I run through my actions, the reasoning for them, pick out the positives and areas for improvement. Then, I let it go for the evening knowing I can discuss it another day with a colleague if needed.*

*I used to spend my drive home putting it right in my head and then get out of the car and think about home life. Same on the drive in, gear back up*

*We have to take responsibility for our own well-being. I make sure I completely switch off at 5pm and engage in something meaningful (and non-work related!) When I get home*

My third space

# The Stress Bucket

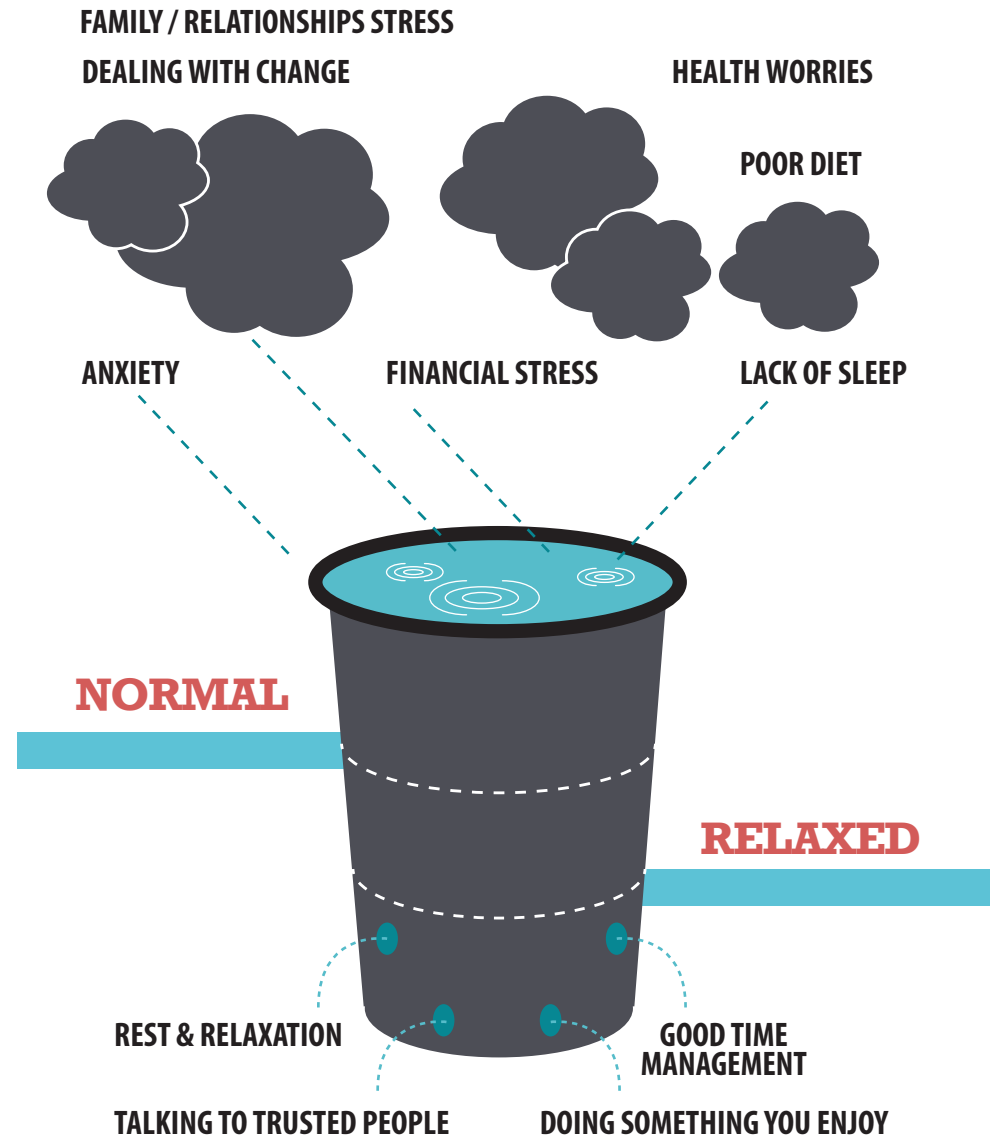
The stress bucket was developed from the work of Braddan and Turkington in 2002. It is a helpful approach to thinking about the level of stress you are under and how it can be relieved. It is designed as a visual prompt to help you monitor your stress levels and the actions you need to take.

The first year of practice, especially the first few months, are an incredibly stressful time. Stressors first year practitioners shared with us included; coping with the workload, uncertainty over what you are doing, unclear expectations, conflicting priorities, financial worries, lack of sleep and moving home.

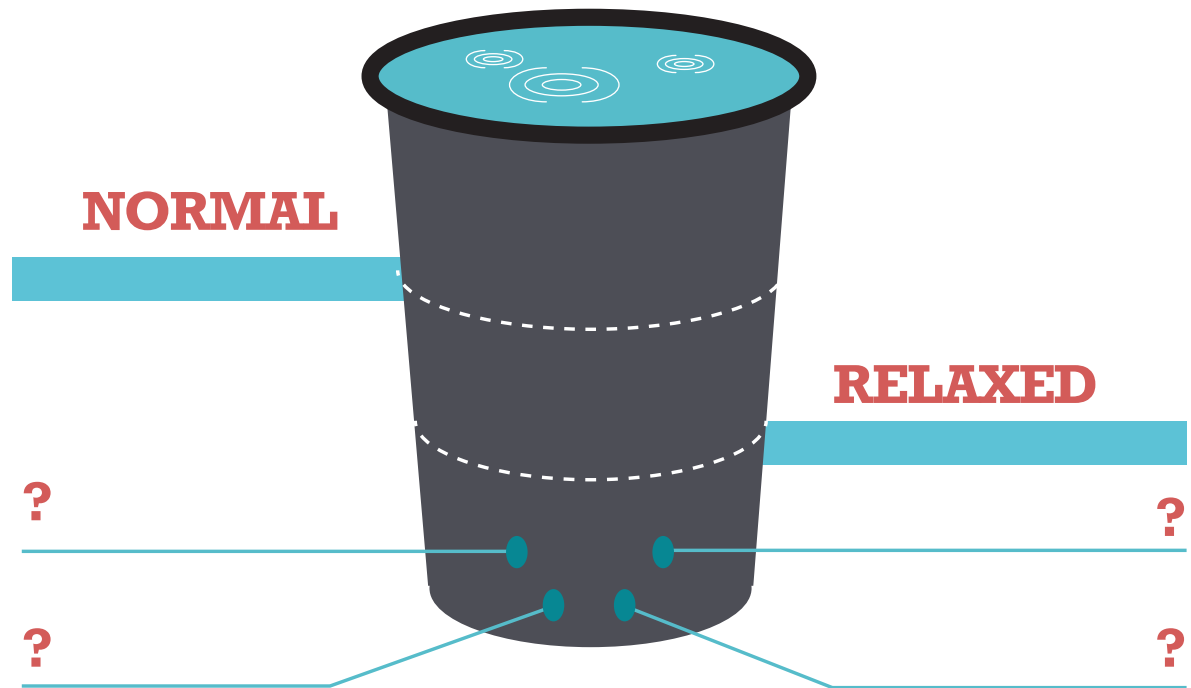
For the majority of people, these stress levels stayed within manageable levels not requiring therapeutic interventions but were certainly at a level where serious attention needed to be paid to self-care.

As you can see from the picture, the clouds of rain are the stressors that pour water into the bucket. The model acknowledges that a certain amount of stress will always be present in our lives and is normal (the upper line around the bucket) but as the level arises above the line, action needs to be taken.

At the bottom of the bucket are taps that can be turned on to let water out. This is an analogy for the types of coping strategies you use. The taps need to be open to reduce the level of water (stress) and keep it within normal limits.



You can use the blank diagram to draw your own bucket. What are your stressors and taps? On a regular basis you can do a bucket audit and ensure that, if the level of stress is rising, you integrate something into your day/week to regulate the level of water.



# A final thought on feeding your growth and development.

The first year of practice is a high-volume period of rapid growth. With regard to your balance and well-being, you need to be proactive in planning some downtime.

“I should have taken leave a lot earlier. Keep going, keep going and then. . . . I’m shattered.”

If you think about the cyclicity of the natural world, it is founded in periods of growth and development followed by periods of restoration. It is not in a state of constant growth. The ebb and flow of the seasons are a reminder of the natural rhythms that surround us.

However, in the fast-paced world we live in it is easy to be lured into a culture of constant full on growth. We finish one thing and move on to the next. We pride ourselves on our ability to multi-task and keep numerous plates spinning. We can feel guilty about taking downtime.

Take a lesson from nature and make sure you plan periods of rest and restoration. Take time out for a long weekend or something a longer. It is what annual leave is for.



# Reflection

This page had been included so that you can use it in your CPD File to evidence your learning

Date:	Impact on my practice
Description of what you have done	
	Follow-up actions or further development.
Summary of my main learning points	
Relevance to my practice	

## References

Adam Fraser Never Take a Bad Work Day Home Again. <https://ideas.ted.com/never-take-a-bad-work-day-home-again-using-these-3-steps/>  
Brabban, A. & Turkington, D. (2002) The Search for Meaning: detecting congruence between life events, underlying schema and psychotic symptoms. In A.P. Morrison (Ed) A Casebook of Cognitive Therapy for Psychosis (Chap 5, p59-75). New York: Brunner-Routledge

Tara Mohr Gift Goals <https://www.taramohr.com/inspiration/if-you-wish-you-had-more-self-discipline/>

## Resources to Explore

There is a wealth of resources available on the internet to support well-being. Here are just a few that you might wish to explore further. They have been chosen because they are varied in their approach to well-being.

### **Becoming Who You Are**

Hannah Braime is a creative coach who blogs about self-care and personal growth and has developed a range of resources which can be downloaded or purchased through her website. [www.becomingwhoyouare.net](http://www.becomingwhoyouare.net)

### **Brené Brown**

Brené Brown is a research professor at the University of Houston. She has spent two decades studying courage, vulnerability, shame, and empathy and is an internationally renowned author and speaker. Her website contains a wide range of resources including podcasts, blogs, downloads and guides. <https://brenebrown.com>

### **Jen Gash**

Jen Gash is an occupational therapist and personal coach and her website contains information about coaching, a series of blog posts related to personal development and links to other occupational therapists working as personal coaches <https://otcoach.com/about-us/>

### **Lynne Goodacre**

Lynne Goodacre is an occupational therapist and personal coach who blogs on a regular basis on topics related to personal development and well-being. She has created a mini-series of free eBooks which can be downloaded from her site. [www.lgpersonaldevelopment.co.uk](http://www.lgpersonaldevelopment.co.uk)

### **Greater Good Science Centre at University of California, Berkley**

An extensive online resource comprising blogs, podcasts, videos, tools and educational programmes informed by research. The tools are focused on creating a happier life and more compassionate society. Well worth checking out. <https://greatergood.berkeley.edu>

### **Gretchen Rubin**

Author of The Happiness Project, and internationally renowned author this website contains a wide selection of blogs and podcasts about creating a happier, more productive and creative life. <https://gretchenrubin.com>

### **Kristin Neff**

Is one of the world's leading experts on self-compassion. Her website contains a range of exercises and tools focused on developing self-compassion and a comprehensive list of recommended reading. <https://self-compassion.org>

### **Life Coach on The Go**

Life Coach on The Go is an online resource providing a wide range of self-coaching tips, tools, articles and resources. <https://lifecoachonthego.com/about/>. It is merging with the Fierce Kindness Blog <https://fiercekindness.com/page/2/>.

### **Mind Tools**

Provides access to several thousand resources including articles, videos and podcasts to support you in learning management, leadership and personal effectiveness skills. [www.mindtools.com](http://www.mindtools.com)

### **On Being**

The On Being Project is a non-profit media and public life initiative making radio shows, podcasts and tools for 'the art of living'. It explores the intersection of spiritual inquiry, science, social healing, community, poetry, and the arts. <https://onbeing.org>

### **Positive Psychology**

A community of practitioners who have built an online science-based resource of courses, techniques, tools and tips to help you put positive psychology into practice every day. <https://positivepsychology.com>

### **Tara Mohr**

An expert on women's leadership and wellbeing, author of *Playing Big: Practical Wisdom for Women Who Want to Speak up, Create and Lead*. Tara Mohr also developed the global *Playing Big Leadership Programme* and is a Certified Coach. Her website includes a range of resources and blogs. [www.taramohr.com](http://www.taramohr.com)

### **TED**

Several of the people mentioned in the pocket guides have given TED talks. A place where you can explore short powerful talks of 18 minutes or less from some of the worlds most inspiring thinkers on a wide range of topics from science to business to global issues. <https://www.ted.com>

### **Tiny Buddha**

The sites feature blogs, articles and insights on a wide range of personal development topics. Whilst it has it's root in Buddhism it is not a site about religion. <https://tinybuddha.com>

## End Note

The Year One: Thriving Not Surviving pocket guides have been funded by the Elizabeth Casson Trust. We would like to extend our thanks to the Trust and to everyone who has contributed to the project. Without the insights that have been shared by the occupational therapy community, with honesty and compassion, this resource would not have been possible.

The Project was led by Dr Lynne Goodacre (an occupational therapist and personal coach) and Rob Young (a writer and artist who helps NHS leaders to communicate).

The project team comprised: Andrew Bates, Stephanie Exley, Joanna Hunt, Bethany Morgan-Davis, Deborah May, Ryan McClure, Rebecca Power, Siobhan Scanlon, Paul Wilkinson, Katy Williams. All of whom were in their first year of practice as occupational therapists.

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The Elizabeth Casson Trust is excited to have commissioned this work by Dr Lynne Goodacre and Rob Young and is proud of, and grateful to, the

first-year occupational therapists who committed their time and energy for the success of the project. The Trust aims to further the profession of occupational therapy and offers a range of support and development opportunities. Please visit our website ([elizabethcasson.org.uk](http://elizabethcasson.org.uk)) and follow us on Twitter (@elizabethcasso1) for more information.

This is one of a series of pocket guides which includes:

- **Becoming Your Own Cheerleader**
- **Building Your Network of Support**
- **The Book of Blogs**
- **Finding Perspective in Tough Situations**
- **Finding Balance**
- **Questioning Your Inner Critic**
- **Treating Yourself with Compassion**

All are available freely from the Elizabeth Casson website.

