



The Balancing Act

Assessing Where You Are On Your Own Personal “Balance” Scale

“There are many ways to achieve balance; what is most important is defining what “balance” means to you and then taking steps to achieve it.”

By Martha Bernadett, MD, MBA
Martha Molina Bernadett, MD, MBA, is a family physician and a VP/General Manager of Molina Healthcare of California, a healthcare company serving Medi-Cal and Healthy Families program patients. She strives to maintain a balanced life with her husband and three daughters and believes that the secret to life is patience and a good sense of humor.

Balance between family and work, scheduled and unscheduled time, plagues every busy professional today. With the advent of the electronic age, there seems to be no more “down” time. Connection to your practice used to make life easier, but now it seems confining. Why? Because the rules have changed. Patients expect to be able to reach you at all times, and patient loads are heavier than ever. If you don’t plan time for yourself, you won’t have any. Doctors are not known for being the world’s best adapters, and most of us find adaptation painful.

We long for simpler times. Times with less paperwork and fewer required forms and reports. Times when we referred patients to colleagues with a phone call, not a faxed authorization form approved by a third party. Times when we took an afternoon off to relax. The romance of the past can lead to bitterness in our daily lives unless we are able to find balance between our ideal day and the realities we face in today’s practice models.

The aim of this article is to provide you with a framework for assessing where you are on your own personal “balance” scale and give you some ideas on how to achieve greater balance that leads to greater personal life satisfaction.

Balance is a very personal thing – it means different things to different people. What is important is that you do what feels right for you. You may be able to make some changes on your own, but some may need help. Investing in yourself now will add time to your life now, when you can enjoy it, as well as time after retirement.

Defining “work”

Think about what you consider “work.” Most family doctors consider any time they spend away from home dealing directly or indirectly with patients or administrative practice concerns “work.” This ranges from coffee in the doctors’ lounge at the hospital at the beginning of the day to bedside examination, to charting, to seeing patients in the office, to phone calls. In addition, any time spent at home that

involves direct or indirect patient care is also considered work, whether it’s talking to a pharmacy or patient on the phone or discussing a case with a colleague. With all that time spent working, when is there time for anything else?

Defining “balance”

The first step to achieving balance is to define what is out of balance. The “work” side of the equation is usually easy to define and populate, so save that for last. To find out what is missing in your personal balance equation, work through the exercises that follow. The ultimate goal is to generate a plan on how to achieve balance according to your own personal equation. In the case studies that follow, you will see some hypothetical examples of steps taken to achieve balance. Nobody said that achieving balance is easy. For most of us, it takes weeks to months to complete all of the exercises and achieve personal balance.

The Balance Table on the next page is a quick way to look at your current state of balance. Compare the corresponding terms in each column, then circle the term from one or other column that best describes how you actually spend your time overall.

This is a subjective table. Does it appear equally balanced to you? Are there circled elements that you would like to change to the other side?

The game plan

The most difficult element of change is to take that first step. Change takes commitment, just as we tell our patients. This change is no different. Most steps you can take yourself, but others may require a professional consultant to assist you. If there are too many things in your daily life that distract you from keeping a focus on finding balance, do what the business people do – hire a personal coach. Have that coach keep you on track in completing the exercises and achieving balance. It is a short-term cost that will pay for itself. You might ask your business colleagues for recommendations or get recommendations from CAFP. Are you ready to be in balance in a year?

Getting started

QUICK-START PLAN

If you are in need of freeing up some time at the office, but not yet ready to create a longer-term plan, the quickest way to achieve that is to use the Balance Table at right and plan to make changes within the next three months. You will need someone else to help you with this, because if you have been living this way every day for the past number of years, it is unlikely that you will change in the next three months. Hire a practice efficiency expert to help you make some office changes that free up a specific amount of time (for example, a goal of two hours a day). If you are willing to undergo a broad practice assessment with suggestions, you may find that even more time can be saved. The cost of this generally ranges from \$5,000 to \$20,000 depending upon the level of expertise of the consultant and scope of changes considered. Spend the money, save the time. You should include specific requirements in the contract with the consultant that they demonstrate that the savings from the changes they identify for you will cover their cost.

LONGER-TERM PLAN

“Longer-term planning” is shorter than long-term planning (20+ years). The purpose of longer-term planning is to glimpse ahead as far as you can, but plan for two years and for five years. By that time, you will be ready to repeat the process, because life has happened and you have evolved. There is nothing wrong with 20 or 30 year plans, but shorter planning allows for greater flexibility.

When to consider longer-term planning

The longer-term plan includes introspection and life planning. I personally know many people who completed the suggested exercises then noted that the process prevented a mid-life crisis. People strive for balance at all stages of their life, but we label the crisis at mid-life because it is such a common time to look for balance or change.

How to approach longer-term planning

If possible, plan some time away to concentrate on working through the exercises (see page 23). The time to complete these

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The Balance Table

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Professional planned

Administrative time
 Outpatient/office
 Time spent interacting with patients
 Charting pertaining to patient's care
 Telephone follow-up with patients
 Completion of forms that do not duplicate other information
 E-mail that I find useful
 Pharmacy phone calls (refill requests)
 Free time
 Time spent looking up drugs on a pocket-card of commonly used drugs acceptable by all formularies
 Scheduled time at the office

Professional unplanned

Clinical time
 Inpatient/hospital
 Paperwork
 Required paperwork (duplicate or regulatory)
 Telephone follow-up on authorization requests
 Form completion requiring excess of necessary medical information or requiring duplication
 Junk e-mail or excessive e-mail
 Writing or calling in prescriptions
 Pharmacy phone calls (authorizing changes due to formulary requirements)
 Time spent looking up drugs in a formulary
 Unscheduled time at the office

Personal – self, family, and friends

Family and friends
 Family meetings
 Meals with family
 Weekend days with family or friends
 Free time with family or friends
 Dinners with friends outside of work
 Free time outside of work
 Outside community activities unrelated
 Time making new friends or maintaining already established friendships
 Leisure reading
 Time enjoying exercise
 Developing a hobby
 Vacation
 Dinner alone with spouse or friend
 Reading to your child or having an unhurried conversation with an older child
 Doing things for yourself
 Class that you took at a community college just because it sounded interesting or fun
 Rewarding events

Professional – above and beyond

Work
 Staff meetings
 Meals outside of the home
 Weekend days working
 Any time at the office
 Dinners with colleagues
 Hospital committees
 Providing free care to community to medicine
 Time meeting new colleagues
 Time reading medical journals
 Time working
 Keeping up with the latest in medicine
 Trip for CME
 CME dinner
 Reading article on a new drug provided by a rep
 Doing things for others
 CME to meet requirements
 Annoying activities or stimuli

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exercises should be time without contact with work. Most of these exercises require at least some quiet time to complete. They are best completed without the hustle and bustle of the practice in the background and the phone ringing. Do not do this on vacation; it's hard work. After you decide to start, plan to complete the exercises over the course of 60 days. Some of the exercises require others like your accountant or business manager to gather data for you or meet with you, so plan ahead. Set aside a long weekend (perhaps a four day retreat) to complete the exercise.

If you are on this journey of life alone, complete the exercises alone. If not, complete these exercises with your spouse or life partner. You can also complete them with a small group of friends with the same goal. The exercises are completed individually and generally not shared with others, but other discussions of related topics enhance the support group approach. Knowing others in the same stage of life results in benefits including the support and camaraderie of participating in such a group. The support group approach increases the chances for success in actually making and sustaining the changes you want to achieve. This group may be friends or colleagues, but all should have the same goal of achieving balance in mind. If using a concurrent support group approach, you should consider hiring a facilitator or personal coach to lead the group through the exercises.

Each exercise is accompanied by the time it is likely that you will need to spend completing it. They do not need to be completed in any particular order. Keep them in a folder as you complete them, for you will want to take them with you to a retreat where you pull them all together and create your plan to achieve balance.

Case Studies

DR. JONES HAS BEEN WORKING 70+ hours a week and has no time to spend with his kids. He would like to be there when they get home from school one afternoon each week and would like one other afternoon per week to develop a hobby. He discussed this with his practice partners and they are willing to accommodate him, but this will result in decrease in his wages (no benefits decrease). He discussed this with his spouse and found she has had an inter-

est in taking up a part-time job for personal fulfillment for some time.

DR. SMITH IS OVERWHELMED with paperwork but doesn't feel her practice is ready for an electronic medical record system yet. The constant reworking and duplication needed to fill out referral authorization forms is what is causing her the most grief. She keeps a file of all the forms for each IPA and health plan. Medical assistants fill out what they can, but she still spends nearly two hours charting each day, arriving home exhausted to her vigorous young children and equally tired husband. Well on their way to reaching their retirement savings goals, they do not seem to have time to live life right now.

“Dreams written down become goals.”

Dr. Smith should invest in electronic conversion of her office forms and standardized letters. Even if the forms are not transmitted electronically, the time-savings in duplicate writing by herself and her staff will lead to a more efficient office. If tied into a logging system, the referral log will be generated automatically as the forms are prepared, so follow-up can be accomplished without duplication of log entry. Standard off the shelf computer programs can be used for this purpose.

For the cost of a single computer terminal and printer, placed in a private location, patients can complete initial history forms in a similar manner. These can be placed in the patient chart and reviewed by the physician, decreasing charting. This is a small cost compared to the extra hours spent charting.

Job-Sharing

(**TWO DOCTORS WORKING FULL-TIME** in a medical group together.) While having lunch one day, both lamented about wanting to spend time volunteering in the schools their children attended. While dedicated to their patients, they each longed for better balance between their family and professional time. At the same time, their group was experiencing some financial pressure, as the practice had not grown as fast over the past two years as expected. Still, it was a steady practice and the two physicians had a proven track record of loyalty to the group and their patients.

Job-sharing is one solution that may provide balance for the physicians and still support the group's needs. Successful job-sharing takes planning and buy-in from the whole group. Some colleagues may resent the freedom and balance that job-sharing allows others. However, if all are agreed, it can be a great asset to the group and individuals. Transition to a shared position generally takes about three to four months. During that time, the individuals sharing the practice notify their patients, start seeing each other's patients while both are in the office (if this was not already the practice in the group), and build their team partnership.

Taking time to educate patients and colleagues on new expectations is of key importance. Several schedules may have to be tried before the optimum schedule is worked out. Some people use the five half-days per week approach (one physician works the morning half-day and the other the afternoon), while others work two and a half-days each or variations of these. Each scheduling pattern has advantages and disadvantages, but eventually one will work best.

Finally, job-sharing takes discipline, cooperation, and flexibility. It is important to keep in mind how call will be managed (in some cases call is split, in other cases each takes equal call with the other partners), how time off is accrued and vacations will be covered, but most importantly, keep an eye on the drift toward spending too much extra time in the office. One of the most common reasons for failure of the job-share arrangement is the drift that occurs over time. Before a physician knows it, what started out as being a team player and pitching in to help get through “crunch time” ends up being a return to full-time work with part-time pay. Drift must be monitored and not become a source of resentment. At the same time, those who share a job must still be able to pitch in as team players with each other and with the group. It is a delicate balance, but the rewards can be great if managed well.

Conclusion

Each of us is unique. There are many ways to achieve balance; what is most important is defining what “balance” means to you and then taking steps to achieve it. 🧩

Balance Exercises

EXERCISE 1: Who am I, who was I? Write your epitaph. Write your own obituary. How do you want to be remembered? Total time: 2 hours. Write it, put it away, look at it tomorrow, and again next week with revisions as necessary.

EXERCISE 2: Where am I? Draw a line on a blank piece of paper. This represents your life. Place an "X" on the line that represents where you are on that line today. Total time: 5 minutes. Think about it.

EXERCISE 3: Paid work. Make a list of everything you've ever been paid to do, childhood to present. Total time: 30 minutes. 15 minutes to write, plus time to recollect and discuss at the dinner table.

EXERCISE 4: People who influenced me. Make a list of people who have influenced you in your life. State in one or two sentences what you learned most from each of them. Total time: 2 to 4 hours. This can be done little by little over the course of several days or a couple of weekends.

EXERCISE 5: Strengths. Write 10 strengths you possess. No, do not make a list of weaknesses. Total time: 10 to 30 minutes.

EXERCISE 6: Personal values. List your values. Total time: 1 to 3 hours. Write, put away, revisit, repeat until satisfied.

EXERCISE 7: What I still want to do? List everything that you want to do for the rest of your life. Be specific, and where possible, be concrete. For example, where do you want to live? If it is not where you are living now, be specific and describe the location as well as the house in as much detail as you can. Another example is travel. Where do you want to travel? How do you want to travel? What do you want to see when you get there? Have you been everywhere, met everyone, and done everything you wanted to do in your lifetime already? Don't forget time with children and grandchildren if that is important to you. When it comes to time, be specific. "Spend more time with..." will ultimately be followed by having to answer the question of how much time. Do what you can – this is your first step. This is where to write down your dreams.

Sit down and do this at the same time as your spouse or life partner, but not together. Create separate lists. Give yourself 30 minutes, and do not share the results until after 30 minutes has elapsed. You may find that there are long pauses while you create your lists, but do not break concentration and talk. Dream quietly and other thoughts will come from within.

Total time: 30 minutes. Keep the list and add to it over time. Dreams written down become goals.

EXERCISE 8: The perfect day. Describe your perfect day. From the moment you awaken, to the moment you fall asleep again, describe in detail, your perfect day. This should be a workday, not a weekend. If you also work on the weekends, then you should complete this exercise twice - once for the regular workday and once for the weekend. If your "on call" days are different from regular or weekend days, then you have a third exercise with in this one – repeat as before. Total time: 1 to 2 hours.

EXERCISE 9: Personal vision. Create your personal vision statement. How do you see the world and your place in it? Write as much as you want, then condense it into a few sentences, short paragraph, or bullet points. Total time: 30 minutes to 1 hour.

EXERCISE 10: Practice realities: time tracking.

Track your time to see how it is actually spent during your workday. You may start this exercise anytime; do not let it create stress for you. Some people look at large blocks such as 3 or 4 hour blocks of time and then stop and list what they did the past several hours. Others pause hourly to create their time tracking list. Do whatever works for you. This is for you to view and use in the planning stages. Total time: 15 to 30 minutes to make notes throughout the day for 2 to 7 days, depending on the variability of your days. If you are tracking on an atypical day, track another day or two and look at the results together.

Upon completing your day, review your list and determine those things that you did that could be delegated. If they could be delegated to someone else or are actually someone else's responsibility, be specific. If they could be delegated to personnel that are not currently staffing your practice, write it down anyway – you may have defined a practice need. Total time: 1 to 3 hours for analysis.

Optional: Hire a practice efficiency consultant to observe how things operate in your office and to follow you around for a couple of days to make observations and suggestions on steps you can take to free up time in your practice. The cost of the time saved or savings due to suggested changes should cover the cost of the consultation and should be included in your discussion with the consultant before signing the consultant's agreement.

EXERCISE 11: Practice revenue and expense analysis.

Review your revenue sources and expenses. Do you spend 40% of your time generating 5% of your income? Total time: 1 hour and 10 minutes. 10 minutes to assign the task of reporting these items to your office manager; business manager; billing company or accountant as appropriate. Analysis time: 1 hour to review with your accountant.

EXERCISE 12: Financial Plan. If you have not already done so, meet with a financial planner to determine how much you need to save to achieve financial independence. Total time: 2 to 4 hours.

Retreat Exercises

It is now time to tie it all together. Your 4 day retreat is scheduled, you are packed and ready to go. Take all your completed exercises with you and complete the Retreat Exercises.

EXERCISE 1: Trade Offs. Determine the trade offs you are willing to make. Balance sometimes requires exchanges – money for time. If you know how you generate money and how you currently use your time, then you are ready to act like your own free agent with your life. This is the exercise that ties it together. It should usually be done with your spouse or life partner. Total time: 2 hours to 2 days.

EXERCISE 2: Written Plans. Create a 30 day plan, a 2 year plan and a 5 year plan. Refer to the exercises you have completed and schedule what you want to accomplish within timeframes. Make timelines with measurable goals. Write the major milestones first, then fill in with the steps needed to achieve them. Get help if you don't know how to complete this exercise or need help in figuring out how to accomplish the intermediate steps. Total time: 6 hours to 2 days.