Personal Balance: Its Importance and How to Achieve It

by Christina A. Geithner, Ph.D., Joseph F. Albert, Ph.D., and Jennifer A. Vincent, B.S.

Learning Objective

To understand the importance of personal balance in wellness, fitness, and work-life realms; to evaluate your current level of personal balance and wellness through reflection and writing exercises, with applications of the transtheoretical model of health behavior; and to become familiar with tools that can be used to achieve greater personal balance for you and your clients.

Key words: Work-Life Balance, Transtheoretical Model, Wellness Inventory, Priorities, SMART Goals

Defining personal balance is a bit tricky because meanings vary from one source to the next and among individuals. Examples include equilibrium, homeostasis, stability, proportionality (appropriate relative amounts rather than equal amounts), well roundedness (e.g., incorporating all aspects of health-related fitness in a training program), mental and emotional poise, and resilience.

Personal balance is something many of us value and strive for as health and fitness professionals, as do our clients. However, the world and times in which we live are paradoxical and do not easily lend themselves toward achieving balance. Although we have greater access to technologies that provide instant access to endless information and possibilities, the same access produces constant demands on our time, attention, and energy. Multitasking is now the rule rather than the exception. Case in point: how many of us or our clients are catching up on our reading while working out on cardio machines? In our workplaces, many of us juggle multiple roles and responsibilities as supervisor or employee, personal trainer, fitness instructor, health-care provider, educator, researcher, and/or consultant. Off the treadmill or stair-stepper and out of the gym, we also play the roles of spouse or significant other, parent, friend, family member, etc., and the expectation seems to be that we maintain a high level of performance at work, at home, and in our communities; intellectually, emotionally, socially, spiritually, physically, etc.—in all of the arenas in which we operate—with fewer resources and less time.

The result? We experience a time squeeze (1). Sally Helgesen, author of Thriving in 24/7: Six Strategies for Taming the New World of Work (2), points out that the 40-hour work week, which was the norm by 1970, is clearly outdated. “We are in an entirely new game, but we do not know how to update the rules” (2, p. 40). In a recent special report on working smart in BusinessWeek, Michael Mandel states, “This epidemic of long hours at the office—whether physically or remotely—defies historical precedent and common sense” (3, p. 60). He suggests that no one has even a moment for backlash. In the same special report, Christopher Farrell writes, “Laments about time pressure are so routine that they have become a common cultural vocabulary. Everybody, it seems is stressed out about time, and achieving ‘balance’ has become the Holy Grail of middle-class family life” (4, p. 68).

The Costs of Imbalance and the Importance of Personal Balance

The imbalances created by playing this “new game” along with our perceived time stress are not conducive to wellness but have negative impacts on our physical health, emotional state, relationships, job satisfaction, and work performance. Numerous studies in the occupational health and safety literature have documented clear relationships between a lack of balance and negative effects on health
Table 1. Major Components of the Transtheoretical Model of Health Behavior

<table>
<thead>
<tr>
<th>Component</th>
<th>Description</th>
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<tbody>
<tr>
<td>Stages of Change: Precontemplation, Contemplation, Preparation, Action, and Maintenance (15)</td>
<td>These stages represent different levels of consideration of behavior change. Precontemplation involves no consideration, while preparation involves detailed planning.</td>
</tr>
<tr>
<td>Decisional Balance: Pros vs. cons, or cost-benefit analysis (14, 16)</td>
<td>This component assesses the pros and cons of a behavior change.</td>
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<tr>
<td>Change Processes: Cognitive and behavioral activities</td>
<td>This involves information-seeking, problem-solving, and other processes.</td>
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<tr>
<td>Self-Efficacy: One’s belief in his/her ability to successfully complete</td>
<td>This refers to an individual’s belief in their ability to achieve a goal.</td>
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<tr>
<td>a task or achieve a goal (18)</td>
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**Exercises for Creating Awareness Regarding Personal Balance**

These exercises can help us move through the Stages of Change, regard to our balance state, or lack thereof (13, 14). The health by considering their perceived costs and benefits with our choices and behaviors related to personal balance and (11, 12) can assist us in being aware of and understanding the imbalance and hope it will resolve itself. When you are aware that you are out of balance, do you take immediate action to restore it, do you wait until the situation worsens to reestablish balance, or do you ignore the imbalance and hope it will resolve itself? Thus, reducing our stress levels through creating better work-life balance is a key step in putting a halt to and reversing these adverse responses to protect and recover our health and function.

**The Transtheoretical Model of Health Behavior**

The Transtheoretical Model (TTM) of health behavior (11, 12) can assist us in being aware of and understanding our choices and behaviors related to personal balance and health by considering their perceived costs and benefits with regard to our balance state, or lack thereof (13, 14). The TTM also can help us move through the Stages of Change and motivate us into taking action. The major components of the TTM are provided in Table 1 (14–18).

**Wellness Inventory**

The health/fitness professional or his/her client must first be at a point of realizing what their current state of personal balance is before he/she can consider whether this is satisfactory. As Dr. Phil would say, “How’s that working for you?” To assist in this endeavor of moving from the first stage in the TTM of Precontemplation, or not having considered a change in health behavior, to the second, Contemplation, or thinking about making one, a Wellness Inventory is provided in Table 2 (19). Notice the areas (physical, emotional, intellectual, social, spiritual, and vocational) in which you feel out of balance. What could you change to create greater wellness in your life?

**A Little Yoga . . .**

Now that you or your client might be considering some changes to create a greater sense of personal balance, try the following exercise to make this inquiry more kinesthetic, dramatic, and possibly more enlightening. Attempt to get into and stay in the yoga position Vrkasana or Tree Pose (Figure 1). Notice what happens physically, mentally, and emotionally as you balance on one foot. Consider the following questions, recalling what just happened and thinking in a broader sense about your life:

- What grounds or centers you? What contributes to and helps you maintain your balance?
- What pushes or pulls you out of balance, off-center, and away from feeling grounded?
- How do you know when you are out of balance? What are the “red flags” that warn you that your balance has been disrupted?
- When you are aware that you are out of balance, do you take immediate action to restore it, do you wait until the situation worsens to reestablish balance, or do you ignore the imbalance and hope it will resolve itself?
- What can you focus on in your life to sustain personal balance?

**Decisional Balance Sheet: Energy Givers versus Energy Drainers**

Decisional Balance (16) is one of the major components of the TTM and involves looking at the pros and cons of a given health behavior or choice. It is, in effect, a cost-benefit analysis designed to assist you in considering change, understand what keeps you from changing (payoffs), and provide incentive for change. You can use the format provided in Table 3 adapted from Richardson’s *Take Time for Your*
Table 2. Wellness Inventory

Consider how “well” you are in each of the six dimensions of wellness based on the descriptions of the dimensions and the answers to the questions provided for each. What is working well for you, and what isn’t; that is, what would you like to change in order to achieve a higher level of wellness? Score yourself on your current level of wellness in each dimension on a scale from 1 (low) to 5 (optimal). Then total your scores at the end to interpret your current level of wellness.

**Physical:** focusing mainly on physical health and quality of life as developed and maintained through regular participation in physical activity, healthy eating, and positive lifestyle choices

- Am I physically active on a regular basis?
- Do I eat healthy, nutrient-dense foods in the proper proportions to one another and in moderate amounts?
- Do I wear a seat belt every time I am in a car?
- Do I avoid tobacco use and second-hand smoke?
- Do I get 6 to 8 hours of relatively uninterrupted sleep per night?
- Can I complete my activities of daily living and occupational activities, and still have energy left to participate in recreational activities?

**Emotional:** emphasizing an awareness and acceptance of one’s emotions, an ability to manage emotions effectively, and an understanding of how our thinking patterns affect our emotions

- Am I able to identify emotional reactions to experiences as they occur?
- Am I able to manage strong emotional reactions (e.g., highly stressful situations) so that my behavior remains congruent with my values and goals?
- Do I work at being aware how certain patterns of thinking (e.g., optimism and pessimism) affect my emotions?
- Do I have a strong emotional support system of family and/or friends, people in whom I can confide, people who can listen to, celebrate with, and comfort me?
- What tools do I have and use to effectively resolve conflict?
- Do I participate in activities and/or spend time with people that I enjoy?

**Intellectual:** encouraging the use of one’s mind to enhance knowledge, increase creativity, and gain a better understanding and appreciation for self and others

- How much mental stimulation do I experience in my work and/or recreation (e.g., intellectual challenges and problem-solving tasks, reading a good book, things that pique my interest and make me think critically and creatively)?
- Do I make use of my intelligence and my mental skills on a regular basis? Am I employing my artistic and creative abilities in some sort of craft (e.g., painting, stamping, making Halloween costumes, woodworking, car detailing, taxidermy, and inventing)?
- How do I use my left-brain skills of math, logic and reasoning, and spatial relationships (e.g., balancing my checkbook, rearranging the furniture, planning the flower bed that will be featured in the next issue of Better Homes and Gardens)?

**Social:** maintaining and nurturing healthy relationships and harmony within the family and with others

- Do I have many friends and acquaintances or do I have a few very close friends?
- How much do I enjoy other people’s company in my leisure time and/or at work?
- Do I connect with my family, friends, and coworkers on a superficial or deeper level?
- What percentage of the time in a conversation do I spend talking? Listening?
- Am I really attuned to what is going on with my family and friends—their feelings, their attitudes, and their lives?
- How much time do I take to talk about really important things with the important people in my life?

**Spiritual:** seeking purpose and meaning in life, refocusing on values and ethics

- Do I feel I have a purpose to my life? Is it meaningful for me?
- Do I feel I have a connection with a Higher Power or something greater than me?
- Do I think or sense that I am part of something bigger than myself?
- Do I make time for prayerful meditation, a chance to quiet myself, time to disconnect from life’s stresses and pushes and pulls, and to reconnect with a source of peace, energy, and balance?
- Does my spirituality bring me a sense of peace and calm in a stressful environment?
Life (20) to document the answers to the balance questions above and consider any changes you might want to make.

**Tool Kit for Creating Better Balance and Wellness**

In addition to using the TTM and the exercises provided above, there are additional tools that have been used in finding, attaining, and sustaining balance and wellness. These include clarifying our values and life’s mission, setting priorities, creating and taking action toward Specific, Measurable, Achievable, Relevant, and Timely (SMART) goals, and engaging in self-renewal activities.

**Values and Mission Clarification**

When confronted with multiple options or multiple demands on our time and energy, knowing what is most important to us—our values—helps us make wise choices. Congruence between our values and our activities or actions result in reduced stress, greater happiness, and peak performance (21). Make a list of the things you value that you hold most dearly, which would make a tremendous difference in your life and relationships were they not present (e.g., meaningful relationships, work that you enjoy, integrity, challenge, etc.). These things play into or are reflected in your life’s mission or purpose. So are the answers to the questions below:

- When do you feel most alive, most truly yourself?
- What do you want to be known for during your lifetime?
- What parts of your life and work give you the most pleasure and satisfaction? The greatest success?

Clarifying our values and sense of purpose helps us to reconnect with our essential selves and develop our internal compasses or “North Stars,” which navigate in times of life’s challenges and changes (22). Knowing our purpose is not only a critical part of a successful journey through life but also critical to having fun along the way. Helpful guidelines for developing mission statements are available on the FranklinCovey Web site (23).

**Priorities**

Goethe once said, “Things which matter most must never be at the mercy of things which matter least.” According to Covey (24), we should put “first things first”; that is, make choices with regard to how we spend our time and energy based on our priorities on what is most important, rather than what is urgent. Setting priorities is critical to avoiding burnout and to balancing long work hours with a healthy family life (4).

To help identify your priorities, try the following:

- List three to five of your most important values, that is, things that would make a tremendous difference in your life and relationships were they not present.
- How would you rank or prioritize these values?
- How well does the way you are living your life reflect or express your core values? In what way? What is missing?
- How would you reorder your priorities to thrive versus just survive?

Setting priorities has implications for time management—in creating time for ourselves and for activities that contribute

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**Table 2. Continued**

**Vocational:** finding ways to give personal expressions of ourselves through our work and involvement in community activities

- Do I experience adequate levels of autonomy, competence, and purpose in my work?
- Does my work intrigue and/or challenge me?
- Do I wake up every day feeling excited about work, or at least willing to go to work?
- What kind of impact do I make through my work?
- What do I do to contribute to the health and well-being of my community?
- How much satisfaction do I get from my work and service activities?

Now total your scores for the six dimensions of wellness and consider the following in determining whether or not you should make a change (or just trust your gut!)

**Wellness Inventory Score Interpretation**

27–30 (A): Excellent! Balanced function and optimal wellness!
24–26 (B): Great job! High-level balance and function! Fine-tune from here...
21–23 (C): Average balance and function—room for improvement.
18–20 (D): Surviving...Time to make major changes.
15–17 (F): Batting at least 500—great for baseball, but not so hot in real life.
<15: Danger, danger, Will Robinson! Emergency alert! Act now to avert disaster down the road!

to our personal balance and help us to live effectively. Consider scheduling the “things which matter most” into your day and week. Also consider building in buffers, time between events and functions to reduce time stress, and activities that support work-life balance, energy, and self-renewal. Priorities provide the basis for SMART goals, which also can be used in managing our time and focusing our actions toward achieving personal balance.

SMART Goals

Having a clear sense of values and our life’s purpose, as well as priorities, paves the way for identifying goals—the means to living our values, acting on our priorities, and achieving our life’s purpose or mission. By articulating clear and

Table 3. Decisional Balance: Energy Drainers Versus Energy Fuelers

First, identify things, people, events, behaviors, habits, etc., that take away your energy (energy drainers) and list them next to “what” in the column on the left (see examples provided below). Do the same for those that give you energy or increase your energy level (energy fuelers). Second, list the costs of each energy drainer (what you lose or give up by maintaining this in your life) and the payoffs (what you gain by maintaining this in your life). Do the same for each energy fueler. Do the costs outweigh the payoffs for a drainer or fueler? If so, you might consider changing this in some way (e.g., reducing the amount or frequency or eliminating it) to create better balance and wellness in your life. Do the payoffs outweigh the costs? Then you might consider keeping this in your life!

<table>
<thead>
<tr>
<th>Energy Drainers</th>
<th>Energy Fuelers</th>
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<tbody>
<tr>
<td>Examples: whiners, &quot;administrivia,&quot; too many meetings, not enough sleep, bad coffee or no coffee, etc.</td>
<td>Examples: healthful eating, regular exercise, adequate sleep, time with friends, etc.</td>
</tr>
<tr>
<td>What: not getting enough sleep</td>
<td>What: exercising regularly</td>
</tr>
<tr>
<td>Cost: feeling tired and impatient</td>
<td>Cost: taking time out of my day, having to take a second shower</td>
</tr>
<tr>
<td>Payoffs: finishing the report for work, keeping my job</td>
<td>Payoffs: feeling better, reducing stress, maintaining a healthy weight</td>
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</tbody>
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Cost: Cost: Cost: Cost:
Payoffs: Payoffs: Payoffs: Payoffs:

concrete paths with specific measures of success, goals provide direction, purpose, and power (25). As such, goals are an extremely effective performance-enhancement technique (26). Consider the following questions:

- What are your long-term goals? What would you like to accomplish before you retire, die, etc.? What impact do you envision having on the people in your life, your chosen profession or field of study, and the world?
- What are your short-term goals? What would you like to accomplish in the next 3 to 5 years? The next year? The next month? This week? Today?

Goals are more likely to be effective and to be accomplished if they are SMART (25):

- Specific—includes sufficient detail for someone else to be able to explain it.
- Measurable—allows for self-monitoring of progress and knowing when the goal has been achieved.
- Achievable—realistic, challenging, which leads to greater self-efficacy.
- Relevant—related to our values and mission.
- Timely—including a timeframe or deadline for completion, which helps motivate us into taking action.

Consider these two goals:

- I will exercise to be healthier.
- To improve my health and to feel better, I will walk briskly at least 30 minutes, 3 days per week, and will monitor myself by logging my exercise in a journal starting January 1.

The latter is an example of a non-SMART goal. The former is much more useful and effective in that it is Specific (identifies the behavior in which the individual will participate: walking), Measurable (results driven: ≥30 minutes, 3 days per week, to be recorded in a journal), Achievable (challenging but not too ambitious), Relevant (linked to objectives and values based: “To improve my health and to feel better...”), and Timely (beginning on January 1).

Consider areas in which you might create better balance in your life that you identified in one or more of the exercises provided earlier. Write down one or two SMART goals that would make a significant improvement in your wellness and quality of life. Include both short- and long-term goals to create an effective action plan (27, 28).

Self-Renewal and Resilience

Establishing and sustaining personal balance also involves engaging ourselves in self-renewal activities that increase our resilience—our ability to “bounce back” from unexpected setbacks (29). Resilience is a survival aide and an essential quality for thriving, having sufficient reserve capacity to perform consistently at a high level and enjoying life while doing so!

Covey emphasizes the importance of preserving and enhancing the physical, spiritual, mental, and social/emotional dimensions of your nature by exercising all of these dimensions regularly and in balanced ways. Doing this forms the basis of the principle of self-renewal or “sharpening the saw,” Covey’s seventh habit (24). The good news is that we can learn to take care of ourselves and create better balance in the different dimensions of our lives. As a result, we will have the energy, reserves, and the ability to give to other people and other things, to adapt to change in our environments, and consistently perform at a high level.

Self-renewal has the following prescriptive implications for us as health/fitness professionals and for our clients:

- Variety in workouts (i.e., in frequency, intensity, duration, and mode) to avoid overtraining in one mode and to reduce or eliminate boredom.
- Sufficient rest between workouts (i.e., days off) or within a given time frame for adequate recovery.
Activities that are enjoyable. Activities that keep us sharp in dimensions other than the physical, including interacting socially, challenging yourself mentally, etc.

Therefore, how do we navigate in the challenging environments in which we operate, how do we achieve and sustain balance and resilience, and how do we help our clients do the same?

**Hot Tips**

To build self-efficacy and increase the likelihood of success, try one or more of these recommended strategies (30):

- Be intentional. If you don’t intend to make the change described in the goal, you won’t reach it.
- Visualize your goal: see yourself as having completed your goal and practice this daily—fantasy helps.
- Make a written contract with yourself stating your goal, and build in a reward for success and/or a penalty for failure, depending on what might be more motivating for you.
- Keep your goal highly visible. Post it strategically in your house, office, or any place you frequent as a reminder of what you are up to—to keep it present for you.
- Go public: share your goal with someone you trust and to whom you can be accountable. Establish a partnership for change, creating social support for your endeavor.
- Take action, even if it is only a small step in the direction of your goal. Every step moves you closer.

In addition, make only one or two changes at a time, rather than trying to change everything at once, practice self-monitoring (e.g., record your efforts and results in a journal, chart, or other format), and celebrate efforts and successes along the journey.

As health/fitness professionals, we must be aware that our examples speak volumes. We have to walk the talk of balance. By doing so, we can have a greater impact on our clients and their success in reaching their health and fitness goals. Finally, we need to be patient with ourselves, our clients, and the process—balance does not happen overnight! A SMART goal coupled with intention, real commitment to change, and focused action will yield results and move us toward better balance and wellness, as well as increased performance and greater happiness.

**Summary**

Creating better balance can be challenging for both health/fitness professionals and our clients, but it is an exercise well worth our time and effort in reducing our stress, improving our well-being and performance, and achieving greater happiness.

Christina A. Geithner, Ph.D., is an associate professor and chairperson in the Department of Exercise Science at Gonzaga University, where her research focuses on body composition, obesity, chronic disease risk, and on talent identification in sport. She is a member of ACSM’s Health & Fitness Summit Program Planning Committee and ACSM’s Consumer Information Committee, and a member of the editorial board for ACSM’s Health & Fitness Journal. She is ACSM Health/Fitness Instructor certified and is a yoga instructor through YogaFit. She also facilitates team building and leadership courses for graduate students and corporate groups in business, accounting, and organizational leadership.

Joseph F. Albert, Ph.D., is an assistant professor in the Department of Organizational Leadership and director of the Comprehensive Leadership Program for undergraduate students at Gonzaga University. He holds a Ph.D. in Leadership Studies, a Master’s degree in Counseling Psychology, and an undergraduate degree in Business Management from St. Joseph’s University. He is a highly sought-after speaker and facilitates retreats, team building, and leadership trainings for corporate groups, and he trains regularly through yoga, running, and swimming.

Jennifer A. Vincent, B.S., is the fitness coordinator at the Spokane Athletic Club. She graduated from Gonzaga University in 2005 with a B.S. in Exercise Science, and has presented at NWACSM, ACSM, and Pediatric Work Physiology meetings. She also is ACSM Personal Trainer certified, a YogaFit yoga instructor, and an AFAA Group Exercise Leader, and teaches classes in fitness, weight loss, yoga, and children’s exercise.
PERSONAL BALANCE

References


Condensed Version and Bottom Line

Personal balance is something many of us as health/fitness professionals strive for, as do our clients. The success to which any of us achieve it can vary significantly from day to day, week to week, and month to month. Similar to and intimately linked with wellness, personal balance is multidimensional, has different meanings and expressions among individuals, and is in a constant state of flux. Regardless of its tendency to be dynamic and elusive, personal balance is a key to sustainability in our own practice and quest for wellness, and to our ability to be effective with our clients in achieving their health and fitness goals. Lack of balance results in stress and is associated with multiple threats to our physical and psychological health and well-being. Thus, personal balance is worth seeking, practicing, and teaching/sharing with others. Awareness can be created, and choices can be considered through the use of a Wellness Inventory, Decisional Balance Sheet, and a simple yoga exercise. Tools for creating personal balance include values and mission clarification, setting priorities, creating SMART goals, and coupling intention with focused action toward our goals.