

Creating a Personal Holistic Goal

Adapted from Holistic Management International¹ for use by students in the UMass Stockbridge School of Agriculture

Holistic decision-making offers us the tools we need to help make decisions that move us toward *that which we truly desire*. It is a fundamental assumption of this class that humans, given the opportunity, will make decisions based both on self-interest and concern for the environment, for other people and for future generations. It is our experience that *holistic decision-making will move you in a direction of increased wealth*. To get started, write your own personal definition of wealth.

What does wealth mean to you?

The process of learning to make decisions holistically includes three basic steps:

- 1) describing the "whole system" available to you;
- 2) creating a personal Holistic Goal statement; and
- 3) practice making decisions.

To begin..... well, just begin. You will rewrite this several times so there is no way you can do it wrong at this point..... just begin.

¹. For more information see.... <http://www.holisticmanagement.org/>

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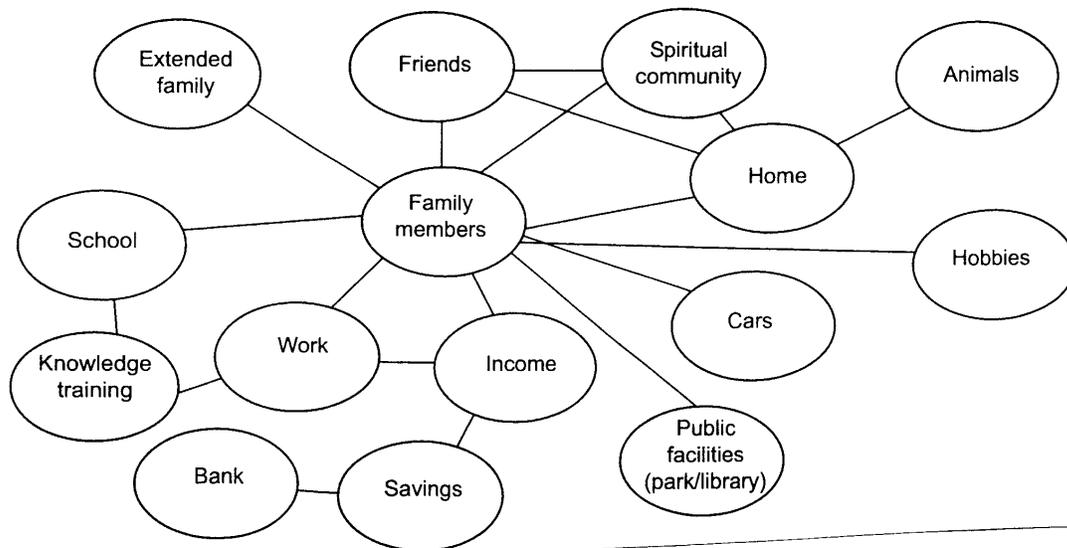
Step One – describing your “Whole System”

The first step in Holistic Decision-making is to describe the “*whole system being managed.*” This is a list of the many resources you have available to you which will be used to move you toward your own Holistic Goal. Careful thought and a little work with pencil and paper will most likely show you that the “system you are managing” is larger and more complex than you think.

Mind Mapping Your Whole System

To help you realize the full extent of your resources, the Mind Mapping tool might prove useful. It also helps when you are having trouble getting started. Here are some instructions and a very simple example. Look at the sample mind map of a typical family below to see what a mind map can look like.

A sample mindmap of a whole.



Now, on a separate sheet of paper, mind map your own whole system as follows:

1. Draw a circle in the middle of a sheet of paper and put the word “*me*” in the circle.
2. Now, quickly write all of the resources (people or things) available to you near the “*me*” starting with those most important. Link them with connecting lines, as in the example.
3. Now, we “dig deeper” to make sure you have a thorough picture of your whole system. Think about the following questions.
 - Who influences decisions in your life? Who do you rely upon for guidance when you make decisions? Who do your decisions affect in a significant way? Family members? Friends? What institutions influence your life? An employer? A school? The military?
 - What major possessions do you have that are important to your “whole system?” This might be quite an extensive list. Let’s start with where you live. Put this down, even if you are renting an apartment. Now, how about a car? Stereo? Tool set? Bicycle? You can stop when it becomes a bit absurd (it is probably not necessary to include your toaster oven, for example). The resources on this list do not have to be owned, but are available for your use.
 - Now, think about yourself as a resource. What attributes of your personality, and what skills do you have that affect your ability to move toward your Holistic Goal? How about writing ability, or compassion, or listening skills? Can you sing?
 - How about money? Let’s list the money you have available. This would include savings, cash and easily accessible credit.

Now, go back and make a new and more complete mind map. The purpose of this exercise is to help you describe what it is you have to work with when you make decisions. This exercise also helps you to realize all the people and things you affect or can influence. This is important information to consider when you are making plans and decisions.

You are now ready to move on to the Holistic Goal itself!

Step Two - the Holistic Goal

Now we will begin to craft your Holistic Goal statement. Before you write your first draft however, it is useful to reflect on your life and your dreams. Lets begin.....

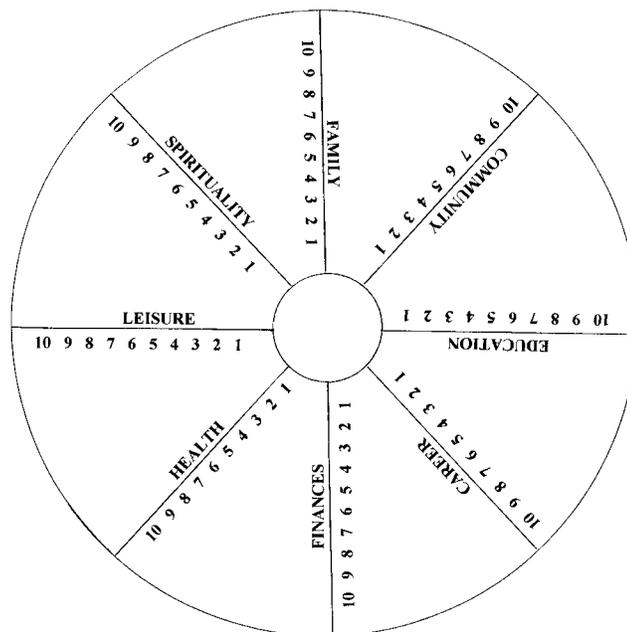
Holistic Reflections

1. Answer the following questions – in writing!

- What are the three things that you really like about your life - right now?
- What three things about your life would you like to change, if you could?
- Name several talents or skills that you have and that you enjoy contributing to your work, family, friends and community
- What is the best part of your day?

2. Now, let's look at your whole life using another tool.

Put your name in the hub of the wheel, and then put an “X” on each of the spokes in relation to your degree of satisfaction with this aspect of your life (“1” being not satisfied, and “10” being very satisfied with your accomplishments in that spoke.).



Finally, connect the “X’s” with a line that will represent your wheel of life. As you roll through life, how will your ride feel? - bumpy, smooth? Fast, slow?

3: Now write your first draft of part I of the Holistic Goal. Consider aspects of life starting with the spokes of the wheel. It may be helpful to select some words that you can incorporate in your Quality of Life Statement. First, cross out the words that you don't want in your statement. Next, circle the ones that “feel right” and you may want to include.

debt free	comfortable	freedom/opportunity
health	fun	financial security
spiritual fulfillment	community connection	challenge
personal growth	contribution	recognition
close family	open communication	connection with neighbors
family work together	time for rest	meaningful work
learning	companionship	welcoming home
excited about work	excited about play	live simply
content	secure	serene
happy	joyous	satisfied
good relationship	productive	stable
without restrictions	wealthy	successful
ethical	change	famous
helping others	honest	independent
adventure	privacy	service
religion	reputation	sophistication
status	wisdom	order
tranquility	loyalty	integrity
physical challenge	pleasure	affection
creativity	expertise	fast-paced
excitement	cooperation	knowledge
leadership	inner harmony	nationalistic
compassion	truth	patriotic
idealistic	laughter	open
promote	fun environment	options
breathe	grounded	redefined success
soul	eat well	community self-reliance
live free	connected	love
power	respect	ecological balance
diversity	culture	ambition

If these words don't work for you, list a few of your own that you think important enough to include in your writing.

-
-
-
-
-
-
-
-

Writing your First Draft

The Holistic Goal includes two parts, I) a Quality of Life statement that is used as a compass to lead you toward your desired quality of life; and II) a statement about how the future **MUST** be to support the quality of life you have described. This will become clear as you do the work.

Part I (HG Quality of Life statement): Considering what you learned about yourself in the previous exercises, write as much as you can about what you truly value in life. Sometimes it helps to begin with the words you selected from the list. For some of us it is best just to start writing. Don't edit yourself or worry about if it is "right." Just do it. Begin with the simple statement such as....

I'd like my life to.....

You should have a few pages of text by now. If you have more or less, don't worry. Once you have some rough text to work with, go back and underline or highlight key phrases from this first draft statement that seem important. Then take each of the phrases and write them in the left column of the table below.

From the draft statement above, re-write QOL phrases in the left hand column.

Quality of Life phrases <i>-from above</i>	What will <u>that</u> give me?	What will <i>that</i> give me?	Now, what will THAT give me?
1.			
2.			
3.			
4.			
5.			
6.			
7.			
8.			
9.			
10.			

Next, for each phrase in the left hand column, ask yourself “*what would that give me?*” And again, “*what would that give me?*” and again. Go down through the entire list once and then go back to the top and ask it again and again.

By the time you complete the right column, you should have some statements that are fundamental (for example, my desire for a big sailboat in column one changed into a desire for a sense of freedom and connection with nature by the time it got to column four). This tool allows you to get to some fundamental quality of life issues. Hopefully you will have fewer but more meaningful phrases in column four.

Part I (your quality of life statement)

Now, write another draft of your quality of life statement using the phrases from the right hand column of the table above. Just do it and don't be too hard on yourselves. You will probably change it later. This time however, write it in the present tense (as if you have already achieved this goal).

Now write....

I'd like my life to....

Part II (the HG future vision statement)

The next step is to describe the future that “must be” in order to sustain the quality of life you have just described in part I. Make sure you include the following three components in your statement about the future by answering these questions:

1. Yourself – what will you be like in the future? Describe yourself as you hope others might describe you.
2. The landscape – what will the land be like in the future to support the quality of life you desire? Describe the physical landscape that you hope to live nearby.
3. Your community – what will your community be like in the future to support the quality of life you desire? Describe the attributes of the community you hope to live in. Consider things like common values, civic activities, health services, schooling, recreation and other community resources.

Now write.....

1. Other people will see me as.....
2. The landscape around me will be.....
3. The community in which I live will be.....

Finally, let's complete your first draft of your Holistic Goal. Write the Quality of Life statement in the present tense, as if it was already true. This can feel empowering when done honestly. Write the future statement in the future tense. Then put the two parts together on one sheet of paper. Edit out unnecessary words or phrases to create a "compact" document using the following format.

Change from "I'd like my life to"..... to the present tense: "I am...."

Here is an example....

My Personal Holistic Goal

I. *I am healthy and spiritually connected to the earth, my family, friends and community. I have a feeling of peace, harmony and serenity. I have time for learning, creativity and rest. I have a loving primary relationship that provides comfort, challenge and joy. I am useful to others and recognized for my contributions. I live with integrity and balance, simply, sustainably, and ethically*

II. In the future,

- I will be thought of as caring, healthy, compassionate and wise, with a sense of humor and a commitment to a simple, sustainable way of living.
- The land will be productive, diverse, healthy and green.
- The community will be diverse, with varying ethnic and age groups, with good community-based public services, varying terrain, good recreation facilities, a sense of wildness and a strong earth ethic..

Then take a deep breath and congratulate yourself. When this is done well, it is difficult work.

Step Three - Holistic Clarifying Questions; Moving Toward Your Holistic Goal

Now that you have a Holistic Goal, you need to “do something” to move toward it. The Holistic Clarifying Questions will guide you along the way. Decision-making can be stressful, especially when you’re in crisis or when a decision is really important. If you look at how people get “off track” and wonder what happened, it usually is not any one big decision but a series of small decisions made over time (each apparently rational) that resulted in the current situation.

Prior to making decisions most of us consciously choose to do some research, ask for advice, think about past experiences, or do “cost/benefit” analyses. Holistic decision-making doesn’t change the value of these approaches, but rather adds another tool in your decision-making toolbox.

So let’s give this tool a try.

How to Use the Holistic Clarifying Questions*

Anytime you’re ready to make a decision, big or small, think about your Holistic Goal and ask yourself the series of clarifying questions listed below. Try not to dwell too long on any one question, but move through them relatively quickly. If a question requires more research, thinking, or conversation with others, skip it temporarily. You can always do more research. In fact, these questions often help identify areas where you will want to spend more time thinking. But while you are doing the questions, try not to get stuck. Just keep moving.

If the answers to the questions generally suggest that this decision will move you toward your Holistic Goal, you may want to act on it. If the decision doesn’t pass most of the clarifying questions, then either:

1. don’t do it
2. rethink the decision and develop an alternative, or...
3. rethink your Holistic Goal (this may happen often as you first learn to use your new temporary Holistic Goal)

Let’s try one! Pick a decision to use for practice. It might be best to start with a decision that you have made recently and seems to be “working out.” Start with something easy and then move on to the “big life decisions.”

First describe a decision you would like to test. Put it the form of an action. For example, *I plan to change my major in college from anthropology to physics.* Then ask the following questions:

Holistic Clarifying Questions

1. **Direction** - Does the action you are considering move you toward your Holistic Goal? If not, stop right here! If it moves you toward parts of your goal but not others, keep moving forward.
2. **Social Weak Link** - Have you considered and/or addressed any confusion, anger, or opposition this action might create with people whose support you need and/or desire in the future? Think about people in your life (refer to your mind map).
3. **Benefit** - Will the proposed action provide you with a big return, in terms of your Holistic Goal? Is this a “big deal?” Consider the time, money, or energy (including emotional energy) you will spend.
4. **Energy and Money** - Is the energy (including emotional energy) or money to be used in this action derived from a source consistent with your Holistic Goal?
5. **Sustainability** –If you take this action, will it lead toward or away from the future you described above in your Holistic Goal?
6. **Final Gut Check** – Considering all the questions and your Holistic Goal, how do you feel about this action now? What does your “gut” say?

After you have looked at your decision holistically you still have options.

- You may choose NOT to do it anyway.
- You may choose to rethink the decision, do more research or test an alternative action.
- You may rethink and rewrite your Holistic Goal (this may happen often as you first learn to use your new temporary Holistic Goal)

Finally, a few helpful hints:

- Once you have practiced using the clarifying questions on a few easy decisions, you are ready to “take it on the road”. Try it out on something more difficult.
 - It is often helpful to have someone read you the clarifying questions out loud.
 - When you get stuck, talk it over with someone you trust.
 - The key to making this work in your life is to use it! As you begin to test questions, you will find “flaws” in your Holistic Goal. So change it!
 - Print your Holistic Goal on one side of an index card and put the clarifying questions on the opposite side. Carry it with you. Use it!
 - Try it for a while and re-think your Holistic Goal on an annual basis (maybe a New Year’s Resolution).
 - Have fun!
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NOTE: This workbook was created by John Gerber with help from hundreds of students who have tested the process and given feedback on what worked and what could be improved. If you have ideas or suggestions, please share them with John at jgerber@umass.edu.