

Decision Case Number 8

Stressed Out! A Holistic Management® Decision Case

1. Below is an email sent to Bree's support group expressing her frustration around her work situation and how it is impacting her quality of life.

From: Bree
Sent: Thursday, 2:13 PM
To: Holistic Management Study Group
Subject: Stressed Out!

Dear Friends,

2. Help! I'm hoping you can help me think this through. My off-farm work is stressing me out! My projects are falling more and more behind. I have been getting angry and frustrated about my work situation. If I don't do something about it, I'll go crazy. This weekend I revisited my *holisticgoal* and reaffirmed, in particular, my quality of life statement I made about work: "I have meaningful occupations, both paid and volunteer, that nurture and sustain me." See my *complete holisticgoal* that I've attached.

Please let me ramble a bit. Here is the problem:

3. I traditionally take a week of vacation on the Island each year by myself, and I'm feeling like I have to give it up this year to finish some key projects with immediate deadlines. The atmosphere at work and the constant interruptions at the office have just about pushed me over the edge. It is impacting my precious work time. It is causing my work to back up, along with making me angry and frustrated. I've got to finish paperwork on two projects, start thinking about a new one and write two grants. With the way things are going, it will take me four weeks to do what I know could be accomplished in five days if I just had some peace and quiet. I've got to find a way to get the work done *and* have a feeling of accomplishment.

4. But I don't want to give up my vacation week to get the work done! Giving up my vacation week impacts my quality of life. Yet, not getting my work done in a healthy work environment and on time also impacts my quality of life.

5. The atmosphere and interruptions at work have proven to be non-fixable in the past, and I'm not willing to put energy/time into it again at this time. *That* logjam will have to wait. The other logjam of meeting a number of work deadlines and commitments is what I need to address immediately.

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6. This is what I came up with for options:

- Not going to the island and trying to finish the projects.
- Going on vacation only.
- Going to the island and completing as much of the work items I can or want to and considering it as paid work time. Anything short of 40 hours would be charged to vacation hours.
- Can you think of any other options?

7. Here are some of things I have to consider before I can decide what to do:

I am very conscious that the organizational attitudes and beliefs would not see working on the island as either work time or the location of a “proper” office. Despite the fact that we’re salaried faculty, we have an unrealistic expectation to only work in the office, from 8 - 4:30 each day, unless doing programming on nights or weekends. It goes against the grain of what work is for most people in the organization if we are not physically in the office. Claiming work time while on the island could have negative consequences for me with my office mates, though not necessarily with my supervisor.

8. I will crash and burn if I don't get some time on the island *and* get my work done.

9. Work could benefit greatly if I’m successful at getting the grants—but I’ve got to write them first. On a personal level, I had already planned the cost of vacation into my personal finances over a year ago and made advance reservations, and I’d lose my deposits if I don’t go.

10. Finally, as I get older, I really need to work smarter not harder and to honor what is important. So whatever I decide to do about this logjam, I want the following:

- To feel enthusiastic about work.
- To be refreshed and excited that I got the projects done.
- Have relief from the distractions at the office.
- Have quality time that allows me to think creatively and do good work.
- Feel energized about being in a place I love and that feeds my soul.
- Feel that I am using both personal and work monies in a productive way.

11. As I’m writing this email, I’m realizing I need to add this statement to my future resource base: "Work environments that are flexible, healthy and productive and not defined by a physical space."

So, what are your thoughts?

Miss you all!

Warmly, Bree

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Exhibit A Bree's Holisticgoal

Quality of Life

- I am healthy in mind, body and spirit.
- I am debt free and financially secure.
- I have space and surroundings that nurture and sustain me.
- I am intellectually active and am creative in my thoughts, actions and pursuits.
- I am proactive in my enjoyment of life. Carpe Diem!
- I have a loving, caring and intimate companionship.
- I have meaningful occupations—both paid and volunteer—that nurture and sustain me.
- I have an ecologically balanced, sustainable, natural environment.
- I cherish beauty, nature, open space, quiet, season rhythms, solitude, and darkness.

Forms of Production

- reflect on life in a positive/optimistic way. HEALTH
- practice healthy living by eating, exercising, and relaxing in a conscientious way. HEALTH
- sustain spirit by spending time in nature, outdoor physical work, being in relationship with others, honoring creative and entrepreneurial self and healthy relationships with others. HEALTH
- actively engage in financial management and create profit from occupations and/or enterprises. FINANCES
- create physical environments that are well-maintained, welcoming and comfortable. SPACE, SURROUNDING and BEAUTY
- engage with environment by being a life long learner. INTELLECTUAL
- create opportunities for intellectual pursuits and travel. INTELLECTUAL
- design space, time, finances and plan for creative pursuits. CREATIVE
- develop good time management skills and practices. CARPE DIEM
- share truths in an honest compassionate way with trust in the process and with humor and kindness. RELATIONSHIP
- be a caring, giving, thoughtful, loving person. RELATIONSHIP
- engage in activities that honor my entrepreneurial, civic and creative spirits. OCCUPATIONS, VOLUNTEERISM
- be mindful of consumption of resources; be politically active; and, financially support my beliefs. ECOLOGY and ACTIVISM

Future Resource Base

Self—I am seen as a pro-active member of my communities for my leadership, integrity, kindness, insights and generosity of resources (time/energy/good works/money).

Landscape—The land is healthy with abundant, clean water and air, productive soils and protected open space and natural resources. Land use is planned with human needs in balance with the natural world.

Community—My community is accepting of diverse populations; actively engaged in conscientious planning that serves all members of the community; protective of natural resources; respects the interconnected web of life; sufficient and sustainable; accessible to a central location for services; and, promotes zero population growth.

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Exhibit B Bree's Decision

From: Bree
Sent: Sunday, 7:30 p.m. (4 weeks later)
To: HM Study Group
Subject: Not so stressed out!

Hi All,

1. Thanks for all your input a month ago around my stressful work situation. I did decide to go to the Island. It was great! The weather was fabulous for late September. I hiked to wonderful cliffs on the edge of the ocean and accomplished so much of the work I had to get done. It surprised even me! I wrote two small-sized grants by hand and mailed them to my secretary to type and proof, and they were ready for me to sign and mail my first day back at the office! I finished two major project reports and again they were waiting for me when I got back to sign and send to stakeholders. I got loads of work-related reading done and had uninterrupted, restful, creative thinking time about where my programming is heading. WOW! All this, sitting on my cliff-based office where the only interruptions were seals who played continuously 50 feet below me in swirling seas and whales surfacing on their migration south.

2. I met my timelines and came back to work refreshed and had energy to address the logjam in the office that has been keeping me from doing the work I need to do.

3. Once again, I used my *holisticgoal* to make decisions on how I was going to make the changes in the office when I got back. We are actually making progress on that front now too!

4. **AND**, I still got to do everything I wanted to on my island vacation, hiking, reading or just sitting quietly! Thanks to a very understanding supervisor, I even got paid for the time I worked.

5. I'm reminded daily how important it is to make decisions based on my *holisticgoal*—even the small decisions—like which side of the island I want to sit on today.

Luv ya, awl!

Bree

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Exhibit C Clearness Questions Adaptation of Holistic Management® Testing Questions

Does the proposed action being considered move her toward her *holisticgoal*? Does the action being considered address the root cause of a particular problem?
(Cause and Effect)

Has she considered and/or addressed any confusion, anger, or opposition this action could create with people whose support she needs and/or desires in the near or distant future? Think about key people in your life.
(Social Weak Link)

Will the proposed action provide her with *a big return, in terms of her holisticgoal*? Consider the time, money, or energy (including emotional energy) she will spend.
(Marginal Reaction)

Is the energy or money to be used in this action derived from the most appropriate source in terms of her *holisticgoal*? Will the way in which the energy or money is to be used *lead toward her holisticgoal*?
(Energy/Money Source and Use)

If she takes this action, will it *lead toward* or away from the future *resource base* described in *her holisticgoal*?
(Sustainability)

Considering all the questions and Bree's *holisticgoal*, how do you feel about this action now? What does your "gut" say? Will it *lead to the quality of life she desires*?
(Society and Culture)

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Stressed Out! Teaching Notes

Stressed Out! – A Holistic Management® Decision Case is based roughly on a real decision process and this author has taken liberties with the facts.

Overview:

This Holistic Management® Decision Case focuses on an individual wanting to work towards her holisticgoal but encountering logjams in her off-farm work situation. She is trying to find a way to honor all aspects of her holisticgoal and is struggling to find the best way to do it.

Learning Objectives:

1. Appreciate the value of a holisticgoal for personal decision-making.
2. Recognize that a holisticgoal is fluid and flexible.
3. Practice using the testing questions.
4. Initiate monitoring a decision.

Use of Decision Case:

This Decision Case could be used with Holistic Management study groups to introduce the use of the testing questions by using a generic holisticgoal. It could also be used for Holistic Management educational outreach workshops to provide an exercise that highlights a holisticgoal and making personal decisions using the testing questions.

Lesson Plan

Materials Needed:

Handouts

- “Stressed Out!” Holistic Management® Decision Case
- Bree’s holisticgoal
- testing questions worksheet
- teaching notes
- flipchart and markers

How much the facilitator needs to teach or explain the concepts depends on whether this is a first time use of testing questions for the learners or if this is a practice session for a study group.

Be open to adjusting this plan to accommodate questions/ideas that may be uncovered in their learning processes.

Teaching suggestions:

- Participants read decision case and holisticgoal.
- Opening question: *Have you faced a similar situation in your own life?*

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- Divide up into teams of 3-5 people and allow them time to re-read the materials and discuss them.
- List these questions on a flipchart and have each group discuss them:
 - What parts of Bree's holisticgoal will help guide her in her decision?*
 - Are there other options she might consider?*
 - How does each option lead toward or away from her holisticgoal?*
- Have the small groups share their thoughts with the group at large.
- Hand out the testing questions worksheet and have each group take one of the options and apply the questions to it. Remind the groups to always keep her *holisticgoal* in mind. Give them about 15 minutes to work through the questions so they work quickly and don't over analyze.
- Groups report back to the total group.
- If time allows, discuss the importance of monitoring decisions and using the feedback loop. As a large group, take a show of hands on which option would move Bree the most towards her holisticgoal. Take the option with the highest number of votes and *brainstorm* things they might monitor for to determine if it is moving her toward her holisticgoal.

There are no right or wrong answers to this decision case. Whether you use Bree's follow-up email is a judgment call for the facilitator. Each group's work with this decision case will be different. Does sharing the "Not So Stressed!" email handout add to the learning process or detract from it? Again, the handout is roughly based on the results of the real decision, but this author has taken liberties with the facts.