

Minimum Holistic Goal Creation Process

It's time to get the wheels of action turning. The purpose of a Minimum Holistic Goal is to have a baseline from which to test the beliefs you hold, the decisions you will make and the resulting actions you will take as you work to create the life/impact/project/process that you desire. A Minimum Holistic Goal is just that – the bare minimum required to *start*. Your MHG will change over time as you work with it and evolve it with new understanding and experience – it is not meant to be cast in stone. It will be enough to get your first steps towards realizing your vision headed in the right direction.

How To Use This Page

Complete the three sections below by answering each question to the best of your current knowledge (we recommend going old school here – write it out on pen and paper). Set aside 90 minutes of dedicated thinking time for this in a place where you and your partner(s) won't be disturbed. Reference the examples if you're unsure of what the final product should look like and to help you put each section together, but don't copy something just because it sounds good. Whatever you put down must be authentic to you and your vision for your life.

Target Outcomes For This Exercise

1. Have a clear, concise understanding of who makes what decisions and what powers they have to allocate what resources are available.
2. Have an inspiring, co-owned Quality of Life Statement that you can use to vet the alignment of future decisions and actions towards that target Quality of Life.
3. Know what you must produce, who you need to work with, and the human community you need to surround yourself in order to realize your Quality of Life Statement.

Ultimately, if you are very purposeful with your words, you can fit all of this easily onto one page. If it's more than that, typically there are things that can and ought to be slimmed down or eliminated. Keep it simple! Simple is clear, and clear is powerful.

Ok, time to get to work.

Section 1: Define The Economic Whole Under Management

1.1 – List The Decision-Makers – Who are they? What powers do they have?

List all individuals responsible for making day-to-day decisions within whatever entity is under consideration, ranging from the day-to-day decisions of operating a business or running a family to the long-term foundational decisions that guide business or family development. Pay particular attention to 1) Who is directly involved in management and decision making, and 2) Who has the power of veto?

[X]

Examples

Decision-Makers: Alice and Bob share decision making responsibilities. Both have the power of veto.

Decision-Makers: Board members, executive officers, and principal owners all have decision making power. Board members have power of veto over all matters of compensation if 2/3 of them agree to one course of action. Executive officers have decision making power within their stewardship realms as defined in the company org chart. Majority owner has power of veto regarding all matters.

Decision-Makers: The two principal decision-makers for the family are Carol and Dave. Both sets of grandparents also have significant decision-making influence. Power of veto has been agreed to be decided by a majority vote taken amongst Carol, Dave and all grandparents

1.2 – Define Your Resource Base – What resources are available to this project?

List the resources available to aid in implementing your decisions and realizing successful outcomes. List the human and physical resources that you can access. These need not be owned, but must be available to you. Only a very general list if necessary (i.e. the land, the factory, machinery, community co-ops, etc.).

[X]

Examples

Resource Base: Friends and family, neighbors, business community, land we own, our 2 cars, our health, Craigslist free stuff, \$50/month budget and savings toward larger items.

Resource Base: A dedicated team led by Dave that will allocate 20 total man hours per week to the project. Carol and Alice will coordinate Dave's output with Engineering and Marketing teams.

Resource Base: Me, my creativity, donations from supporters, and community participation. 10 donated hours per week at the local Maker's Station, free materials from Craigslist and found items.

1.3 – Money – What money is available to the project?

Make a preliminary list of the financial capital available to the project. Not all amounts can or need to be quantified, does not need to be super detailed. (i.e. liquid savings, pension income, lines of credit etc.)

[X]

Examples

Money: 30% of cash flow above and beyond \$22,000 per month in gross revenue will be put towards this project. This will continue for 6 months or until self-funding status is reached, whichever comes sooner.

Money: \$50/mo saved towards development of the homestead, initial chunk of savings up to \$500 is ready to seed the project.

Money: Grant from the NRCS covering compost application, seeding, tree planting and fence installation for 3 years, personal savings from income.

Section 2 – Create Your Quality Of Life Statement

A Quality of Life Statement expresses how you want your life to be based on what you value most. Write it in the first person and present tense (“I am/We are” vs. “I will/We would”). Write as if it is already here and you live it day to day. It should encapsulate and express the reasons you’re doing what you’re doing, what you are about and what you want to become. Answering the questions below may help you ‘jump start’ the process.

1. What are the conditions, experiences and things necessary for you to have a good life? (Good health, prosperity, leisure time etc.).
2. What do you want to give and receive from your closest relationships?
3. What kind of relationships and with whom do you need to have them to achieve all that you set out to achieve?
4. Which skills do you want to develop and what knowledge and talents do you want to enhance through undertaking this endeavor? What challenges you?
5. What am I/are we contributing to the world through my/our daily efforts?

[X]

FINAL STEP: Refine your answers to the above questions along with additional insights into a single paragraph Quality of Life Statement.

[X]

Examples

I enjoy freedom in time, health, wealth and spirit in my daily life. I live in a place where I experience solitude and daily quiet from the sounds of modern man while also living in close relationship with my wife, blood family and chosen family. I am surrounded by natural beauty in an ecosystem vibrating with life, and I spend my time restoring, repairing and regenerating broken landscapes towards this state of abundance. I support myself and my loved ones on a portion of the surplus generated by well-tended, perennial ecosystems. Each day I awake vital and excited to do my work in the world, employing both broad ranging and highly developed, specialized skillsets in service of people, planet and purpose.

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My wife, children, and I spend quality time together every day because we cherish each other above all else. I passionately employ my skills to improve the sustainability and luxury of our lives and others'. We manage our assets responsibly and monitor them vigilantly to maintain our financial security. We regularly seek knowledge, skills, and ideas on how to be better stewards of the Earth. We remain open to new opportunities and embrace change in whatever form it comes.

~

I have positive, loving and supportive relationships with my husband, children, family and chosen family. These relationships encourage personal growth and fully support the pursuit of mental, physical and emotional wellbeing. I live with my husband and children and in close proximity to my nuclear family. Our children have the opportunity to grow up with the love and guidance of all family members. We spend quality time together, but also work diligently to maintain financial security for our family. We live in a place surrounded by natural beauty and continually strive to live with a lighter footprint and deeper connectedness to nature. Each day I wake up with purpose knowing my daily work and actions contribute to the health and happiness of my loved ones, the planet and it's creatures.

~

My time is spent pursuing the deepest understanding of this human condition. That effort helps create an atmosphere of love, understanding , continual growth and purpose. A place in nature where peace and harmony resides will certainly enhance this growth and can emanate and resonate to like minded people eager to work at many levels and aspects of improving themselves and the world around us.

~

I wake up each morning excited to use my gifts of communication, empathy, creative problem solving and intuitive thinking to care for my family, home, and community. Clear communication provides the foundation for my relationships with my husband, children, family and friends, and we engage daily in mutually beneficial systems of people and earth care. My home is a quiet and peaceful place where I can engage with my work mentally and physically, and also take time to rest spiritually and emotionally. I am engaged with tending the people and land in my care, and abundance flows freely.

~

I am living in close connection to nature, family, and community, with health and strength allowing me to participate fully. I am supported by and give full support to my husband, and give full support to family friends, as we grow, learn, and evolve. My creative self has flourished, arising from a long hibernation. I feel joy and deep satisfaction each day as I participate in working with the landscape, seeing it grow in its abundance for all living things. My spiritual self continues to develop and deepen, giving me the strength to handle the flows of life and to help me feed the harmony of family and community life. I feel gratitude for being able to contribute to the prosperity of the family unit, in terms of financial, spiritual, skills and service to family and community.

~

I wake up everyday excited for the day and what I can contribute. I have achieved a healthy balance where I am equally productive and able to enjoy nature, the fruits of our labor, and the people I love. I work hard for the whole and enjoy helping others (family and extended community) achieve the goals. I am energized by all the creative/interesting souls that surround me and by our degree of self sufficiency. I fall asleep each night content and appreciative of the life we have created together.

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I am embodying my authentic Self through a regular practice of meditation, nature connection, and council, and have transformed unhealthy relational patterns and habits passed down through my family line into healthy, connective ones. I am stewarding a piece of land towards greater health and abundance alongside my family and tribe, a chosen family with whom I share in consistent love, harmony, inspiration, support, fun, and intimacy. I am a waterman and woodlander, with a deep love for, understanding of, and connection to the native flora, fauna, terrain, and waters of the bioregion in which I live. I am able to provide abundant quality time, a comfortable, secure, and inspiring home, healthy and delicious food, fresh water, and connection-building, invigorating experiences for myself, my family and my tribe through the 8 forms of capital received in exchange for doing work aligned with my purpose.

Section 3 – List Necessary Forms Of Production

Profit from whatever you produce will need to be a form of production in most cases. Be very general in describing where the profit needs to come from (i.e. “Profit from U-pick fruit” vs. “Profit from High Bush Blueberries”). One form of production can sometimes satisfy multiple Quality of Life Statements. List only what is to be produced, not how it will be produced (How something is to be produced is a decision that needs testing, for which we need at least a Minimum Holistic Goal).

3.1 – What resources are you willing to commit towards realizing your desired Quality of Life?

Phrase in terms of time, money, energy, tools, space, accepting or letting go of responsibility etc.

[X]

Examples

Commitment: In order to realize our desired quality of life, we need to manage our time well between work on the land and work on careers. We need to find balance and consistency in our daily schedule to see it through and learn a true maintenance program as we develop this landscape.

Commitment: We are ready to let go of our perceived responsibility for the rental units on property, and instead hire a service to maintain them. This will somewhat decrease revenues but give us a lot of time back. The time that we currently invest in running the rental operation will be put towards the U-pick orchard enterprise as we are seeing the most traction there. We have the greenhouse, tractor, existing tree stock, propagation tools, plant propagation knowledge and good relationships with our existing customer base. We each have 50 work hours per week we are willing to dedicate to this enterprise.

3.2 – Identify what must be created and/or achieved to attain each Quality of Life Statement.

Each member of the whole should have their own Quality Of Life Statement *or* should be able to give a fully resounding “YES!” to a co-written Quality Of Life Statement shared by the group.

[X]

Examples

What must be created/achieved: We must create a big picture, master design to start chipping away at so we feel that our time on the land is useful. We need to generate money on the farm to continue paying for the growth that we are working towards.

What must be created/achieved: We must create a pace of life that allows us to enjoy all of the things we are working towards as we work towards them. Life is a journey, not a destination, and we need to make sure we remind one another to stop, smell the roses, savor the little successes and

appreciate each other along the way. For Alice this means ~15 hours per week managing the website and running the farmstand. For Bob this means ~40 hours per week working in the business, and weekly check-ins and priority setting on Sundays.

What must be created/achieved: An accountability system paired with rules-based prioritization of tasks on a day-to-day basis. We will be employing The ONE Thing methodology to do this, with weekly 4-1-1 check-ins, nightly SUCCESS list creation for the following day, daily accountability measures between us as husband and wife, and Quarterly goal-setting and review meetings off-site from this location.

3.3 – Describe the state of your Resource Base as it must be many years from now if it is to sustain the production you require in order to create the quality of life you want.

Frame in terms of...

1. **The Land** – What is the state of the land under management within the defined whole in 100 years to ensure the continued necessary production? 'Land' is referred to in the broadest sense – soil, plants, forests, birds, insects, wildlife, lakes, streams, oceans etc.
2. **The People** – How must we/our enterprise be far into the future for the people we rely upon to remain loyal, respectful, supportive and engaged? The people we rely upon may be clients, vendors, suppliers, extended family, environmental groups, regulators, government representatives etc.
3. **The Community You Want To Live In** – What services will your community have to have available to sustain what you produce? List them. How do you want your community to feel, look, act and be?

[X]

Examples

The land: Have an asset to pass down, as rental property, or to sell.

The people: Treat family like friends, and friends like family.

The community you want to live in: Good relationships with neighbors, supportive friends and a powerful Circle of 5 that keeps us learning, growing and increasing the value that we bring to the world.

~

The land: We are recharging the aquifer system rather than taking from it, worms and mycelium are breaking down organic matter everywhere you look, not only is food in production but materials

of all kinds are being utilized and we turned the land into an edible landscape of food forests and perennial abundance.

The people: Fair share, love, transparency and clear communication is to be at the forefront of all endeavors in order for good energy to always be circulating through the land.

The community you want to live in: Living in shared abundance with those around us and close to us. We get to see our efforts boost those of our family and friends, and likewise they do the same for us. We all have each other's backs.

FINAL STEP: Weave your answers to Section 3 questions into a cohesive paragraph or series of paragraphs. A cohesive vision of necessary Forms of Production might look like...

[X]

Example

We are recharging the aquifer system rather than taking from it, worms and mycelium are breaking down organic matter everywhere you look, not only is food in production but materials of all kinds are being utilized and we turned the land into an edible landscape of food forests and perennial abundance. Fair share, love, transparency and clear communication is to be at the forefront of all endeavors in order for good energy to always be circulating through the land. We enjoy an abundance of food from this land that nourishes us, creating a deep sense of happiness and fulfillment as we go through our daily rhythm.

Completing Your MHG

Upon completing the three sections, take a pause, and say thank you to yourself and those that went through this exercise with you. You've just done some serious introspective work, more than most people ever do. We recommend at this point that you walk away for a day – all the work you've done will still be here tomorrow. Come back tomorrow and read what you've written – we can almost guarantee with a good night's sleep and a fresh day's perspective you'll catch things you missed as well as identify things you can remove.

Remember to *keep it simple*. Simple is clear, and clear is powerful. Stick to the suggested questions and don't stray. This is a Minimum Holistic Goal – enough to get you started in the right direction – don't let details creep in! This is the 40,000 foot view – you don't have to figure out *how* you're going to do it all right now. Having a complete MHG will help you determine the right *how, who, where* and *what* when the time arrives to begin testing your decisions during the design process.

Testing Decisions Towards A Holistic Goal

From Savory, *Holistic Management* p. 267 - 332

The power of these tests lies in having a Holistic Context (i.e. Goal). All actions must be tested towards the Holistic Context, without which they become meaningless. The following seven tests can be applied to design decisions as they need to be made in order to verify that 1) the decision does in fact have to be made, and 2) that the available choices will in fact lead you towards realizing your desired quality of life and larger vision for the project, landbase, enterprise or other initiative.

Cause and Effect

Does this action address the root cause of the problem? Could this action unleash problems later? Continue asking “What is the cause of this/that?” until you drill down to THE core problem. Typically one finds either resource management problems or people problems at the core of THE problem.

- For resource management problems look first to the 4 ecosystem processes for answers (Savory, *Holistic Management* p. 101 - 149).
- For human behavior problems first search for the cause in organization, management, and leadership style.

WHEN to use this test: Always perform this test first. If the action in question *does not* address the root cause of the problem (effectively making it a waste of time, money, energy, resources etc), does it still belong as part of the larger system?

Weak Link

To strengthen a chain of production when resources are limited, one must always attend to the weakest link first.

- **Social:** Could this action, due to prevailing attitudes or beliefs, create a weak link in the chain of actions leading toward your holistic goal?
 - **WHEN to use this test:** Use only when the contemplated action will affect people whose support you need.

- **Biological:** Does this action address the weakest point in the life cycle of the organism (whether the goal is to increase its numbers or decrease it)?
 - **WHEN to use this test:** Consider only when an action is taken to increase or decrease the number of organisms.
- **Financial:** Does this action strengthen the weakest link in the chain of production?
 - **WHEN to use this test:** Consider when there is an unsustainable cost of production relative to profit.
 - NOTE: The products you finally sell are not responsible for your profit: how you reinvest your money in the chain of production each year is.

Marginal Reaction

Which action provides the greatest return, in terms of your holistic goal, for the time and money spent?

WHEN to use this test: Use this when choosing between alternatives.

- NOTE: This test applies only when *two or more* actions are being compared.

Gross Profit Analysis

Which enterprises contribute the most to covering the overheads of the business? Consider fixed costs (those that are constant in a given enterprise) vs. variable costs (those that vary with scale of production) when performing this analysis. Determine which scale is being used to evaluate a given enterprise - i.e. gross profit per acre, per dollar of capital or per human-hour of labor.

WHEN to use this test: Applies only when two or more enterprises are being compared.

Energy/Money Source and Use

Is the energy or money to be used in this action derived from the most appropriate source in terms of your holistic goal? Will the way in which the energy or money is to be used lead toward your holistic goal or away from it?

- Is the proposed use providing infrastructure that will assist in reaching your holistic goal?

- Is the proposed use merely consumptive (i.e. degenerative, no lasting benefit) or cyclical (regenerative, more cycling of resources, lasting benefit).
- Is the proposed use addictive, in that once initiated, you risk an undesirable dependence on further inputs of energy or money of that particular form?

WHEN to use this test: When a certain enterprise, system or process *is* necessary for the function of the larger whole of which it is a part, but can be run using different types of energy input. Reference the [Regenerative - Degenerative Continuum and five resource categories](#).

Sustainability

If you take this action, will it lead toward or away from the future resource base described in your holistic goal?

- Evaluate from the perspective of the people you live with, the community you live in, the community services available within it and the state of the land base outlined in your [Minimum Holistic Goal](#).
- Again, reference the [Regenerative - Degenerative Continuum and five resource categories](#).

When to use this test: Consider when evaluating an enterprise, system or process for long-term energetic viability.

- Does the action up for consideration move the enterprise, system or process towards a greater degree of energetic autonomy, self-sufficiency and an increase in the availability of the inputs (resources) required for it to function?

Society and Culture/Gut Check

How do you feel about this action now? Will it lead to the quality of life you desire? Will it adversely affect the lives of others? This test asks how you *feel*, where the others have asked what you *think*.

When to use this test: This test should always be done last.