

**Date:** \_\_\_/\_\_\_/\_\_\_ **Economic whole:** \_\_\_\_\_

**Decision-makers:** \_\_\_\_\_

**The problem is:**

(Note: It will usually be a ‘problem’ that you are addressing. In the absence of a problem, you will most likely be testing whether an action provides the whole under management a genuine opportunity for growth.)

**The purpose of action(s) to be tested, and why:**

(Note: Before proceeding any further, make sure that everyone is *absolutely clear* about the purpose of any actions you will test. For instance, if there is a problem organism, the purpose of your actions will most likely be to ‘change successional conditions’. In other words, you need to be thinking deeply about the real problem rather than just the visible symptoms.)

**Alternative actions we are comparing that might address the situation are:**

(Note: Be very precise in describing the action(s) you will test. For example, if you need to alter succession, you might write “Use herd effect ...”. Then test several ways to stimulate Herd Effect and address the purpose.)

- 1.
- 2.
- 3.

**Doing the testing:**

(Answers can be YES or ✓ [Pass], NO or X [Fail], ? [Don’t know], or NA [Not applicable].

1. When testing several alternatives, pass Alternative 1 through all the Guidelines first, before proceeding to test Alternative 2, and only then go to Alternative 3. Never attempt to test all alternatives simultaneously!
2. Whenever an action tests as ‘X’ or ‘?’, note down the reason it did not Pass the particular Guideline

**Always be very careful you are not testing to justify your decision!**

Testing Guideline	Alt 1	Alt 2	Alt 3
<b>Cause and Effect:</b> Does this action address the root cause of the problem? <i>Ask yourself – What is really going on, here? What is THE problem?</i> Or if not a problem: Is this a genuine opportunity for growth?			
<b>Sustainability:</b> If I/we take this action, will it lead me/us towards or away from the Capital Base described in my/our Holistic Resource Base? <i>Check that you are not settling for less than genuine movement.</i>			
<b>Weak Link:</b> <ul style="list-style-type: none"> <li>- <b>Social:</b> Have I/we considered and/or addressed any confusion, anger or opposition this action could create with people whose support I/we will need in the near or distant future?  <i>Ask yourself – “Could we upset our Capital Base by taking this action? Have we really explored all ways of avoiding doing so?”</i></li> <li>- <b>Biological:</b> Does this action address the weakest point in the life cycle of this organism?  <i>An endangered species will die at the weakest point in its life cycle—this is often the juvenile stage. An outbreak of a problem weed or pest is best controlled at the weakest point in its life cycle.</i></li> </ul>			

**Decision-testing Worksheet and Monitoring Record**  
(Version 3.1)

<b>Testing Guideline</b>	<b>Alt 1</b>	<b>Alt 2</b>	<b>Alt 3</b>
<p><b>Weak Link (continued):</b></p> <ul style="list-style-type: none"> <li>- <b>Financial:</b> Does this action strengthen the weakest link in the chain of production? <i>Always an important test, and especially in the financial planning process, when you are allocating your 'Wealth Generating-W' funds. The links are: Resource Link, Product Conversion Link and the Marketing (or money conversion) Link. Note: No matter how strong your production chain is, one link is always weak.</i></li> </ul>			
<p><b>Energy/Money   Source and Use:</b></p> <ul style="list-style-type: none"> <li>- Is the energy or money to be used in this action derived from the most appropriate source in terms of my/our holistic goal? <i>Source: For money, is it coming from an internal or external source; For energy, is it derived from a finite or infinite source—and when used, is the energy benign or possibly damaging?</i></li> </ul> <p>Will the way in which the energy or money is to be used lead towards my/our holistic goal? <i>Use: Is money/energy going to be used to create infrastructure supporting movement towards your holistic goal; will it be consumptive (no lasting benefit)?; or 'cyclical' (no further money/energy inputs will be required in order to retain the benefit); or, are we establishing an unnecessary/undesirable/avoidable dependence on this source?</i></p>			
<p><b>Gross Profit Analysis</b> (Compare two or more enterprises): Which enterprises contribute the most to covering the overheads of the business? <i>Particularly used in the financial planning process. A critical test then. You should be testing that the 'Income less Variable Costs' of each enterprise in your business is yielding a high GP under Poor, Average or Good conditions. The GP is the money that is available to pay the Overheads, including yourself!</i></p>			
<p><b>Society and Culture</b> (Feelings more than thoughts): Considering all of the questions and my/our holistic goal, how do I/we feel about this action now? <i>Very much a 'feeling' question. Let your emotion have a say</i></p>			
<p><b>Marginal Reaction</b> (Use when choosing between alternatives): Which action provides the greatest return, in terms of my/our holistic goal, for the time and money spent? <i>Ask this question as – "Which alternative gives the biggest bang for the buck?"</i></p>			

**Having passed the alternative possible actions through the Guidelines our decision is:**

Important: If still unsure of your decision, probably because of many '?s', you should identify what additional information, knowledge or research you think is required, and who should do the work to get this information.

**We need this information:**

(Note: When that work has been done, you must all come back and test again.)

**'Early Warning' monitoring indicators:**

If our decision is wrong, listed below are the subtle early-warning indicators we can track, that will warn us we have not succeeded. We will then identify, test and make corrective decisions, in order to regain direction towards our holistic goal?

**Social indicators:**

**Biological indicators:**

**Financial indicators:**