

# **Well-Being Ultimatum**

Protect Yourself and Your Team From Burnout  
and Compassion Fatigue

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## DEDICATION

Thank you to my teachers, students, research assistants and colleagues at George Mason University for your support and inspiration. It is an honor to bring research into practice with you.

Thank you to my team at YogaMedCo, LLC for being part of this growing journey of bringing *Well-Being Ultimatum* out into the world through our coach training programs. Together we have gone so far in such a short time – because together we go further than we could ever go alone (and have more fun along the way).

And most of all, thanks and love to my amazing family, especially

My Dad, Patrick Carmack, who taught me through his example to love, coach and teach without conditions or judgment;

My Children: Chris, Brandon and Sophia, who deepen my understanding of what love and joy really mean and who inspire me with their resilience and brilliance every day; and,

The Love of My Life Bob Shircliff who supports and protects my subjective and objective well-being, every single day, while making life really fun

And My Angels

Mother Dixie Reese and

Sisters Patricia Carmack and Cynthia Carmack  
who taught me to savor every day in earth school.

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# A Note From the Author:

*Well-Being Ultimatum*, 2<sup>nd</sup> Edition

Many people think that the title of this book implies that I am going to force them into some type of mandated program for their well-being. It might be the title that makes them think that, or the fact I am a well-being promotion scholar and I have been honored to work with leaders and teams worldwide – including the Pan American / World Health Organization – to transform well-being cultures in personal, team, and even agency well-being transformation.

As you're about to see in this book, nothing could be further from the truth. The well-being ultimatum I will ask you to make with me is actually made by you and with you. Because, we both know that whatever you do in the world, it needs you to be at peak performance every day. And, we also both know that sometimes in the act of living, leading, caring, giving, healing, supporting, coaching, and loving, you have put yourself last.

Yes, I see you, and your struggle to balance your work and life.

And I know that it's hard, because you love what you do.

And, I get it because guess what, that's me too.

But, I also know that we don't want you to burnout like I did.

So... we're going to stop putting you last, and start putting you first so that you can (ironically) have more to give everyone else, OK?

If that thought of putting yourself first – finally, and once and for all, excites you and terrifies you at the same time (because you know and feel that it is really hard for you to do that), then this book is for you.

Inside you'll discover how despite the fact I have been researching and promoting well-being since 1997, I had to learn the hard way – in my own life – that all of us (even us well-being scientists) need to pull over and get strategic about both self-care and self-compassion. It is a matter of well-being promotion AND prevention (of the burnout compassion fatigue, stress contagion, and maladaptive perfectionism that plagues those of us who love what we do and love to serve).

Because, what I have found in both my doctoral research exploring what does and doesn't protect well-being, and in my real-world work with leaders in the c-suite, four-star general officers, celebrities, and yoga moms like me, is that inside we are all the same despite the fact the world may ask different things of us every day. We are all human systems – and because of that we are really no different than a performance race car that must be driven with care even at its highest rate of speed. And, every now and then, we need to pull over off of this race track we call life in the fast lane to ask for some help to check “under the hood” of our minds, bodies, and hearts to make sure we are operating at our optimal potential.

Inside this book, I'll teach you a system for doing this.

Notice I said a system, not a script. One size does not fit all.

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I am going to walk you through a strategic planning process for your own self-care – the same process I share with the people I coach and the teams I consult. You’ll discover that it is not complicated, and it is not one size fits all. It blends both Western and Eastern ideas about what health really is. And, it is all meant to help you to shine in the world, with more overwhelm and less joy.

If you’re ready for that, and you’re ready to find out why your efforts to put yourself first haven’t worked in the past so that you can make this work once and for all...

Then let’s take a deep breath together, and let’s begin!

–Suzie Carmack, PhD, MFA, MEd, ERYT, NBC-HWC

February 2020

# Prologue to the Second Edition

Is this your moment?

The moment where you stop putting off your self-care once and for all no matter how much the “busy-ness” of your day has asked of you.

The moment you start living like you mean it - no excuses - and honoring the truth of who you really are.

The moment when you stop making excuses that everyone and everything else comes first -- no matter how big your life is, no matter how many people are depending on you, and no matter how many troubles you have.

The moment when you start realizing that how you live every day matters for how long you get to stick around here on planet earth, and the quality with which you experience each of those days.

The moment when you start taking care of your body – not as a punishment through denial and deprivation but as a respectful act of love and gratitude.

Because this is the moment when you start performing joy every day -- in your mind, your body and your life.

This is the moment you make your well-being ultimatum.

Because we super heroes need to stick together 😊

Dr. Suzie Carmack, February 18, 2020



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Oh my heart.  
Don't become discouraged so easily.  
Have faith.  
In the hidden world, there are many mysteries, many wonders.  
Even if the whole planet threatens your life, don't let go of the  
Beloved's robe for even a breath  
— Rumi

If we could change ourselves,  
the tendencies in the world would also change.  
As a man changes his own nature,  
so does the attitude of the world change towards him....

We need not wait to see what others do.  
— Gandhi

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# CHAPTER 1:

## SUPER HERO SYNDROME: WHY YOUR DRIVE TO HEAL, LEAD AND/OR SERVE OTHERS CALLS FOR A WELL-BEING ULTIMATUM

Have you ever seen Wonder Woman or Super Man eat, sleep, work out, or go out to dinner with family and friends? They don't need to – or at least they don't think that they do.

News flash: Despite your heroic tendencies – your compelling need to live in the service, leadership and healing of others like Wonder Woman or Super Man – you are human too. Unlike those and many other Super Heroes, you are allowed to ask for help and support so that you can save and change the world. This means that you must put your self-care first -- not after everything else is taken care of, but beforehand. Every day.

Sound familiar? The idea of this is easy for anyone to understand. It's the implementation into our life experience that is the hard part.

Why is that? Why is it that the people who dedicate their life's work to helping (healing) other people have a really hard time beginning with themselves? Why is it that all of us humans need to be reminded on airplanes to put the oxygen mask on ourselves before we take care of the person in need next to us?

If you are curious about these questions, and what they may mean for your life's work, your health and your well-being, then this book is for you.

Let's begin by discussing something called Hero Syndrome. It is a condition which has not been scientifically researched much, but has been discussed at length in popular culture.

“The hero is driven by the need for approval, recognition, and being wanted and valued. The need is met briefly by the “high” of being asked to do something, but it is exactly this short-lived high that makes it an addictive cycle. In order to get it met, you have to keep saying yes. The secret is getting the need met in a much healthier way. (Fortgang, 1999)

Although there has been a scientific screening instrument (survey) developed to identify those with the Hero Syndrome, there have been no scientific studies conducted to investigate it or to validate the survey which screens for it in the first place. Further research is therefore needed to explore whether or not it is really a syndrome or not, and if so, the syndrome's causes, as well as the ramifications for those who have it.

Despite the fact that the hero syndrome has not been scientifically investigated as well as it should be, I start our discussion on the assumption that it does indeed exist. This is because I have

seen the pattern of thinking noted above many times – in my work with clients, students, and even, yes, with myself.

Upon further review of the description of Hero Syndrome, we can see that Hero Syndrome does not sound like something that is very fun. It sounds like something that feels like being overwhelmed by one's need to feel needed – often times without reward.

At first glance we might assume this is just a self-esteem issue – and of course it is. The person is trying so hard to please others they have forgotten to take care of themselves. They may not even know what that means.

This book does not unpack why that might be – why some people have self-esteem issues that highly increase the likelihood that they become “yes people” (heroes). Instead, I propose here, that there is actually a “special case” version of Hero Syndrome, which I call Super Hero Syndrome.

Unlike the hero in Hero Syndrome, who is caught in an endless cycle of people pleasing that never seems to feel right or powerful, the Super Hero has essentially the opposite problem.

In the Super Hero syndrome, the individual not only gets a “high” off of helping other people, they get a second (super) “high” from helping, healing, leading and/or caregiving others. This second high results from the fact that these special case heroes – these Super Heroes – perceive their service-, leadership-, and/or healing-oriented work to be a fundamental component of who they are. Like everyday heroes, they are addicted to saying yes. But unlike everyday heroes,

this addiction does not stem from their need for approval; it stems from the fact that they are in positions in which they really are needed (to heal, to lead, to serve, to protect, to counsel, to coach, to give care, and/or to parent).

Simply put -- it's not about their self-esteem, its about their call to service. Super Heroes are tirelessly dedicated to helping others, and they know this work is their life calling and/or their Life's Calling.

To explain further, I propose here that Super Hero syndrome is a “super-charged” version of hero syndrome that can easily plague those working in service-, caregiving-, medical-, military-, leader-and/or healing-related avocations. The folks who are the ones who lead us, who heal us, who protect us, who care for us, and who serve us are more likely to “give and give until they can’t” because they have a super-strong sense of “meaning and purpose” regarding what they do. Their desire to help is embedded in who they are. The result is that they can have a super-charged addiction to helping others, because they essentially receive “two hits” every time that they say yes: the high of feeling needed (described in the hero syndrome definition above), plus, the second high of fulfilling their “call” to help the world. As we will see in chapter three, both social support (feeling needed) and meaning and purpose (calling) are types of subjective well-being – they make us feel good (happy) about ourselves, and our lives.

I should note here that Super Hero syndrome, is not only a special case of Hero syndrome, it also has some similarities with



Chronic Hero syndrome. In Chronic Hero syndrome, a clinically-recognized phenomenon, affected people create a risky and/or desperate situation, and/or disobey rules so that they can resolve the situation and be seen as extraordinary.

The difference between Super Heroes and Chronic Heroes, is that Super Heroes do not have any malicious intent in what they do; they do not desire to break civil or ethical laws. However, they may at times create “risky” situations regarding their own health and well-being by ignoring their own real and human needs in favor of their call to serve and heal. And, they may at times believe they are “above the rules” of self-care (i.e. forgoing meals, sleep, exercise) because they perceive that they don’t need these as much as “everyday” humans do. They believe that their attention must instead be devoted to their humanitarian work, rather than their self-care. In short, others’ and/or the world’s needs come first.

How do you know if you have Super Hero syndrome? Nothing gives you more joy than helping (i.e. serving, leading, teaching, parenting, caregiving or healing) others. Even though the heroic work you do helping others is challenging, and at times exhausting, you love every minute of it. This is because the selfless work that you do helps and/or heals people, and that act of service is your calling. Like a Super Hero, you take this calling seriously; it is not a 9-5 job but it is a 24/7 way of life. You are there when people need you – no matter what. You save the world wherever and however you can, through big choices and small acts.

You, Super Hero, are all about saving the world, one healing

(leading, serving, caregiving, parenting) act at a time.

Whether your work is volunteer or paid; and whether it is inside of the home or outside of the home, you want nothing more than to “be the change you wish to see in the world”. As a parent, a scholar, a warrior, a CEO, a teacher, a military service member, a police officer, and even a factory worker or a rock star -- you are a change catalyst in your community. Others look to you for guidance, leadership and healing (whether you ask them to or not). And you oblige them because nothing gives you greater joy—seeing *them* happy, safe, and thriving.

If you are a leader, you put your people’s needs first. If you are an artist, you see your work as a driver for social change. If you are a caregiver, you are committed to providing that care without question – anytime, day or night. If you are a teacher, you are concerned with your student’s ability to learn as much about themselves as their learning outcomes. If you are a parent, you read *Good Night Moon* for the 110<sup>th</sup> time with as much expression as the first time you read it because you know that no matter how bored you are inside that every time you do so makes your baby smarter and happier. If you are a writer, you struggle with syntax until that difficult concept is boiled down to simplicity, perhaps without realizing a few hours have gone by in the process. If you are a clinician, you pull a 24-hour shift because the latest trauma would not wait. You do these things without fail, no matter what it takes out of you, or from you, because that is who you are.

If you want to, and can do any and/or all of these tasks

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without fail, every day, then you are a healer. I don't wish to imply that there is anything wrong with this type of excellence and/or high performance in these roles.

If, however, you put these tasks first – before your own self-care practices, before your own needs for social support from family and friends, and/or before your need for services that help you to maintain your health, wellness and well-being (physician, dentist, therapist and/or any other type of specialists), then you are suffering from Super Hero syndrome.

The distinction between a healer and a Super Hero, is that the healer is dedicated to helping others in these selfless ways, without sacrificing them Selves (their self-care, social support and need for services) in the process of healing others. The Super Hero, on the other hand, is so consumed by helping others that they do not always follow through on their self-care, social support and/or service needs. They believe that others need them too much for them to take the time that they need to take care of themselves.

When your need to help and heal others gets in the way of your self-care – before the needs you have as a human to sleep; to exercise; to balance your financial priorities; to eat well; to spend quality time with family and friends; to engage the creative aspects of your psyche; and to manage your (medical) health needs effectively – a breakdown in your mind, your body and your life can occur that does not look much different than the effect that kryptonite has on Super Man. In the process of healing, leading and/or serving others without honoring these needs for self-care, you create a risky and

potentially threatening situation for your longevity and your quality of life.

How do I know? I know, because for years, I had Super Hero syndrome too, although I didn't have a name for it then and I certainly would never have admitted to it if I did. I thought it was just this "thing" about myself that I could not deny – that putting others first and ignoring my own self-care needs in the process was how I did life, because after all, I was dedicated to my call to service. This "whatever it takes" attitude was reinforced during my formative years in education and throughout my career; people who push hard to get the job done are celebrated for their unwavering commitment to the project at hand.

Successful people are known for getting things done – no matter what it takes.

I was this person. I was the person that got things done. No matter what. If you have seen the jacket to this book, you see I have earned a lot of letters – not because I wanted to collect letters but because each educational venture was something that had value for the work I was doing at the time, and because I like completing things. I like knowing all I can about something. I am insanely curious, and I don't like quitting. Anything.

This drive I have (and still had) is not all bad. It has enabled me to succeed and to have a mostly wonderful life so far – a life I never would have dreamed of having as a little girl growing up in a suburb of Pittsburgh, PA.

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However, the drive had a dark, or scary side too. Usually the “get it done no matter what” part of me would be all too willing to ignore my self-care, social support and/or services needs. It wasn’t because I didn’t value these – I did. This trade of my call to service for my personal (care) needs was made in order to Make. Things. Happen.

The problem (which I did not view as such) persisted because I received nothing but positive support for this behavior. A dangerous cocktail of thinking occurred that went something like this. (1) I felt good helping others, knowing that my work was making a difference in the lives of others who were important to me; (2) I felt as if I was fulfilling my sense of meaning and purpose (service) in the world and (3) I received nothing but positive messages of appreciation for my efforts.

What was not to like? I was helping people feel good, and that felt good for me. I was succeeding as far as my work and the world was concerned. But just like any cocktail, what felt good at the time was not completely good for me.

The problem with this line of thinking, was not that I was enjoying the “triple shot” of feel-good feelings from my service-above-self attitude. The problem was found in the fact that I had a strong belief that I did not need to practice self-care (at least not regularly) and that I didn’t need other people’s support (even though I was actively supporting them). After all, I was the one people came to when they needed help. I was the one that was calm during insanity and/or crisis events. I was strong, and I was functioning well,

and I was helping people -- so why not wait another day to take care of myself when there was so much (healing, leading, serving) work to do? In the case of the teams that I led and/or managed, I did not want them to see me ask for help because this would mean that perhaps I didn't know what I was completely doing after all – and that might make them uncomfortable (which of course made me really uncomfortable).

Not only could my self-care and my need for social support wait, I was also very reluctant to lean on any type of (professional) service that would support my well-being too, because I felt that others needed these more than I did. Much like a physician is oftentimes the last person to self-refer themselves to get medical attention for an ongoing medical need (which is why they have a reputation for making the worst patients), I was reluctant to ask for help from people and to receive support from any type of service field (i.e. medicine, health coaching, financial planning, legal counsel). At the same time I would highly recommend that my family, my friends, or my clients go to these same specialists -- the doctor, the massage therapist, the chiropractor, the acupuncturist, the therapist, or any other “service provider” when they needed help – I was not taking my own advice.

My pattern is an excellent case study for the Super Hero Syndrome in action. Super Heroes don't think of themselves as heroes, or Super Heroes – they just do what they do and believe that this approach to life is who they are. They don't perceive this way of life as maladaptive; they see nothing wrong with it. They actually

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think it is all for good – because they continue to get positive reinforcement from the people they are helping (thank you!) and from others who express appreciation for their kind acts. They can also see the value-add contributions they are making to the world – how their caregiving, parenting, leadership and/or service acts really are making a difference. If no one tells them they should stop, and what they are doing is causing otherwise good (healing) results for others -- why on earth would they want to stop?

This is the most difficult part of Super Hero syndrome; people don't know that they have it because they believe the pattern that they are in is working for them and for those who they are serving. Like an alcoholic that doesn't realize that what began as a simple cocktail has now turned into a binge episode, the Super Hero does not see where their efforts to help (heal) the world shifted into a darker, maladaptive place.

But now that I have gone through the process of making my own well-being ultimatum, I can see much more clearly. Like a recovering alcoholic that can re-see past events with a different perspective – that understands now that what at the time felt good was actually not so good for them or those they care about – I can see now where what I thought was OK (my Super Hero tendencies) really weren't. In fact, they were dangerous for me, and for those they care about – and they certainly weren't optimizing my well-being.

I see now that my Super Hero thinking wasn't flawed because I thought I could save the world – or at least help as many people as possible in my work and in my life. My Super Hero thinking was

flawed because I failed to balance this “call to service” attitude with a commitment to maintaining and restoring my very basic human needs. As humans, we have evolutionary needs for self-care practices (to do what is good for us to ensure our longevity) and for social support (to live well and to enjoy life we know it must be shared with those we deem important).

As humans, we are also bound to find ourselves unable to “fix” the stresses of our lives alone, and/or even with the support of our friends and family. In these cases, we need what I’ll call professional services (although they don’t always have to be something you pay for). By services, I mean that we need to rely on the expertise of others to help us to handle tough challenges (stress and/or crisis) and/or to take the next step forward in our evolution (optimize our lived experience). If we always do what we always did, we will always get what we always got. When we are faced with a new challenge, this may not always work; hence, we need to hire, lean on, and/or contract others who know the way to help us through the difficulty, and to a higher (optimized) level.

So, my problem was not that my efforts were misplaced; the world needs healers (those who live in the service, leadership and/or care of others). The problem was that I failed to recognize that I am a human, and that I need those “3 S’s” – self-care, social support, and services. My my commitment to service, my call to lead, and my ability to help others heal took precedence over these basic (3 S) human needs, and in so doing, the basic management of my health, my wellness, my well-being and my life as a whole.



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Like the unaware alcoholic, workaholic, or addict, I did not understand that the assumptions I was making (that others needed me more) and my behavior pattern (delaying and/or ignoring these 3 S's) was inherently flawed. My kids came first, closely followed by my work (which I loved) and the rest of my family's needs. Self-care practices, time for support from family and friends (social support) and my use of services to help me manage my finances, my legal privilege, even my hair – could all wait.

As a smart, educated, functionally healthy, and otherwise happy-with-my-life-and-work person I did not see that this act of putting everything else first was setting myself for an energy drain (compassion fatigue and burnout, which will be explained in chapter 2). In my mind, at the time, I was just tired, and even exhausted by the fact that the work I was doing was hard; I didn't realize that one of the reasons I was so tired was because I was all outflow (healing efforts) and no inflow. Like any other Mom who gets up with a sick infant at 2 am, I told myself that this was just par for the course (of my life and life in general these days), and that I could push through. I didn't see any of this as maladaptive (bad for me) because I thought that's what was required – by my roles as a mother, a leader, a business owner, and an educator. As the saying goes, "To much who has been given, much is expected."

Here's the funny part, that really isn't funny, and is frankly very hard to admit. The work part of the above-mentioned imbalanced equation – is the promotion of health, wellness and well-being. Yes, the work I do, my calling, is to enlighten and empower people about

the importance of self-care, social support and the use of health services – in both traditional public health work and also complimentary forms of healthcare (private mind/body medicine and well-being coaching practice). While I built my career training teachers, personal trainers and coaches in promoting self-care education; teaching college courses in health promotion, health policy, exercise physiology and well-being; leading classes and one-on-one sessions in yoga and Pilates; training instructors in these disciplines; and even leading retreats and master classes internationally – I was not always taking my own advice. I spent my days, weeks, months and years training others in the art and science of living well -- to put themselves and their self-care first, to experience peace, and to align their inner reality with their outer -- and I wasn't fully walking that walk myself.

It took a long time for me to come to terms with, and really see, how hypocritical I was in the way that I was living. I would go to bed at night, realizing the day had gone so fast, and I had been so busy encouraging others to be healthy and enlightened, that I had forgotten, and/or ignored my own self-care needs. They keynote that I gave took workout time out of my day; the papers I graded took time out of dinner preparation and fast-food was my answer; my children needed me to drive them to their lesson so my coffee date was rescheduled. Again.

I would close my eyes, telling myself that just for today that this was OK – because this is what this day had asked of me. I would reconcile the hypocritical feelings I felt, by telling myself that these

others really needed my time and attention more than my self-care did. I was strong. So my own needs could wait until after the next (fill in the blank here – workshop, manual, or keynote speech) was accomplished. Self-care would wait until after my child’s cold was over, or when that next paper was written. That coffee date with my friend could be postponed again, because I had a deadline to meet. My mammogram could wait until next week; it would be too hard to get a sub for my class. I would get to it – to me – eventually.

What I didn’t stop to see, which was right under my very eyes, was that every day I had a different story about why my self-care, social support and service needs could wait. Every new day came with its own pressing needs, so despite what I would tell myself there was no magic day that was waiting for me with open arms to engage in a self-care catch-up session.

So most days, the pattern would only repeat itself.

Every day that I put off self-care practices, and didn’t ask for help (through social support and/or services), I was becoming more and more of a hypocrite (without intending to be). Interestingly, the word hypocrite derives from a word that the Greeks used to describe a stage actor, who would use a mask while playing a part, to imply the act of pretending or masking. That is exactly what I was doing – masking the fact that I could not reconcile my own self-care needs as a human with my need to “perform” in my work as a health promotion strategist, educator, advocate and healer and in my life as a mom of three.

If you met me or knew me in my real life, you would laugh a bit here, because you would know that I do not normally go walking around my life announcing that I am either a hypocrite or a Super Hero. I am equally embarrassed about both of these ideas. It is even more embarrassing to admit these facts to you here and now.

I come clean with this secret, I take off my mask, to illustrate to you just how sneaky Super Hero syndrome can be, and how dangerous it is too. I share it with you now so that you can learn the warning signs of it – and so that you understand the way forward for stopping this pattern of behaviors (this syndrome) if you find you have it too. If someone like me could have it – someone trained as an expert in stress management, alternative therapies, health promotion then it is highly possible that others (not trained in these fields) are susceptible to it too.

By now you may be wondering how I made the ultimate shift – how I made the well-being ultimatum once and for all. It took a pivotal moment for me to see that what I thought was OK (the way I was living) really wasn't. From this place, this bottom, I was able to really turn things around once and for all.

I wish I could say that this pivotal moment came out of my own volition – that I willed it into occurring. But, nothing could be further from the truth. It was only when a crisis occurred (a tsunami of events that traumatized my health, wellness, and well-being) that I started to see these patterns in myself, and to eventually conceptualize them into a behavior pattern, and ultimately a syndrome. The moment is described in the Prologue of this book.

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The details of how I got to this moment don't ultimately matter, but if you're curious, I'll summarize. In the space of one year my health was threatened by a terminal illness; my life was threatened by abusive people who I thought were supportive; my finances were destroyed by a failed business investment -- all while I continued to help the world as a teacher, healer (yoga therapist) and well-being consultant, while I was completing my PhD in health communication and while I was raising my three children.

If you had met me at this time, you would have most likely only seen the "onstage" performance of my life. You would have seen me as the working single mom, putting herself through a PhD program, and who loved her work in yoga therapy and health and well-being promotion. What you would not have seen, is that "backstage" in my life, I was failing on all fronts. Not only was I trying to handle real-time threats to my financial, physical, and relationship health without help (because I told myself I didn't need these services -- that I could just push through); I was also failing to engage in self-care and I certainly wasn't making time for social support (family and friends).

Most of the people I interacted with on a daily basis -- clients especially -- had no idea that any of these crises were going on, because I didn't think it was appropriate to share these crises with anyone. Just as no one in the Metropolis knows that Super Man is actually Clark Kent, no one knew that Suzie the mom, yoga therapist, educator, and consultant was going through Very Big and Hard Stuff and trying to do it all essentially alone. (I did let a few people in, but only with very deep regret; like a Super Hero that does not want to

expose their real identity for fear of losing their ‘super power,’ I did not want others to know I was having trouble. It wasn’t because I was trying to be perfect; it was because I didn’t like the attention. I was used to being the one that DID the helping – not the one that RECEIVED it.)

For a long time I quietly accepted the difficult moment at the end of the day, when I would go to bed at night knowing that I had failed my backstage self. Her need to go for a walk, have coffee with a girlfriend, and/or attend her latest mammogram had been ignored yet again because I had Very Important Work to do. I would start to contemplate how I could snap myself out of the pattern; and sometimes the next day, I would actually do so. But these efforts were generally short-lived, because the minute that Someone Needed Me, I would start thinking like a Super Hero again and would tell myself that my needs could wait until after the day/person/problem was dealt with and/or “saved”.

Then one day something not big but deeply internal happened. It occurred as I was descending an elevator, heading out to my car, trying to decide what to make for dinner and trying to plan out how I was going to pull off teaching a yoga class at 6:30 am the next morning when I had a dinner to serve, homework to check, papers to grade, another paper to write, and a bathroom to clean. I wondered how I was going to pull all of this off while still suffering the effects of an injected medication that had numbed my neck while my dermatologist took a large graft of skin (located above my carotid artery) to test a very suspicious-looking mole. As the elevator hit the

bottom I did too: I realized that I could no longer keep up the charade. It was time to take off the (Super Hero) mask once and for all.

That day, I made a well-being ultimatum with myself. The moment gave me a new kind of peace that I haven't really lost since. That said, I wish I could say it has been "easy" making the life shifts that I have needed to in order to live in ways that honor both my call to service and my personal (3 S) needs. Actually, it has taken me four years to really get it; and I know that it will continue to be a process over time. Like a recovering addict, I have had moments where I thought I had healed myself so well that I no longer needed to follow my own self-defined protocols – and the Super Hero addictive thinking would creep back in again. And, like a recovering addict, I now know that it is only through a daily commitment to my well-being – all parts of it (physical, mental, emotional, purpose, and social) and all sides of it (subjective and objective) – that I can truly live the good life in a way that is also good for me (and those I love).

Through these four years of research, and trial and error in my own life, I have created an approach to well-being -- a well-being ultimatum -- that even I (my own worst patient) really does live well with. It helped that I was studying health communication and health promotion at the time this was all occurring, and that I had over a decade of experience in mind/body medicine to lean on throughout the process. I also "test piloted" the process in various ways with my clients – many of whom are C-suit executives, general officers, corporate leaders and fellow healers. Over time, what you see here, in

this book (especially the process illustrated in chapters 5) emerged.

My commitment to well-being is one I renew daily, because that is an important part of this well-being ultimatum process. I also delayed sharing this process with the world for a few years. In recovery programs, you have to be practicing your recovery for a while before you become a leader, or a sponsor. In the yoga community, you have to practice yoga for a long while before you train other instructors. In much the same way, I had to really work my own well-being ultimatum plan, privately, and in small doses with my clients, before the process emerged, and before I could share it.

So ultimately, what you will see in this book is what I have found to be vital components of your well-being ultimatum, gleamed through my own life lessons learned, as well as my research, my work with clients and my overall fascination with what it means to live well. I hope that what has taken me time and sweat to create will actually make it easier for you to optimize your well-being; the healer in me hopes that my personal challenges will not be for naught, and that they can instead be leveraged into your ultimate well-being success.

I should note here that my choice to share some of my personal challenges with regards to my well-being was made to hopefully give others (like you) courage to see how secretly exhausted you are too. By bringing self-care procrastination and/or the never-ending pressure of Super Hero thinking and living behaviors out into the open, I hope to give others the courage to share their stories too. If you are living to serve, heal, and lead others without giving your



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Self the same courtesy – it is time to see the cold truth that this is draining you, your quality of life, your health, and your ability to be of Service in the first place. It is time for you to see that the people who care about you – both the people you are leading, serving, healing and the people who are in your real (backstage life) – all need for you to get your well-being together. Failure is not an option.

If this discussion resonates with you – because you see yourself in it and/or you know someone who this describes -- this book is for you. If you are a lot like me – you are not just a normal “people pleaser”; you are someone who has a high (and at times extreme) drive towards charity, philanthropy and/or service, this book is dedicated to helping you to make a well-being ultimatum with yourself once and for all.

This book will give you further details on why you have these tendencies – which will help you to understand why they are so difficult for you to break. It will also explain how quietly dangerous (risky) these tendencies can be for you, your work, and your quality of life. It is important that you take the discussion seriously in your mind, feel the consequences in your heart, and take action in your body -- because if real positive change is to happen in the world, and if you are the one to do it, then you must be ready. Think of this book as your training tutorial on how to optimize your mind’s, heart’s and body’s capacity – your well-being ultimatum.

If you are someone who knows “to those who have been granted much, much is expected,” and you take that motto very seriously in the ways that you see yourself and in the ways that you

live, then I hope this book helps you to integrate your self-care, your need for social support, and your use of professional services into your to-do list. Although these “3 S” endeavors may not give you the same physiological “high” as helping someone else will, or the same “high” as being of service to the world through your own unique (life) calling, they will ensure that you have enough capacity to meet the demands that these gifts place on you – and the high performance demands you place on yourself in meeting them.

If these themes are resonating with you, but are making you uncomfortable, don’t worry. As mentioned before, facing these tendencies is difficult for many reasons. But one way to put your mind at ease through these difficulties is that you should know you really are not alone. I sincerely believe that there are many people out there who are struggling inside with this deep challenge. They don’t know about the syndrome; they don’t know how many other people are suffering from it; and if they do know (which is doubtful) they don’t know where to go to get help for it.

In fact, due to the general lack of awareness surrounding the Super Hero syndrome, I believe it can be considered what my colleagues in health promotion would call a “health disparity”. According to the CDC (2015), a health disparity is

“a preventable difference in the burden of disease, injury, violence, or opportunities to achieve optimal health that are experienced by socially disadvantaged populations. Populations can be defined by factors such as race or ethnicity, gender, education or income, disability, geographic location (e.g., rural or urban), or sexual orientation. Health disparities are inequitable and are directly related to the historical and current

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unequal distribution of social, political, economic, and environmental resources.” (CDC, 2015)

Traditionally, health promotion strategists consider these health disparities to be associated with cultures that are marginalized, or lacking privilege and/or power in some way. (Notice the quote singles out the “disadvantaged”.)

It is neither a comfortable, nor comforting thought to consider that we health promotion strategists (and anyone who tries to help the world through their work as a caregiver, leader, parent, healer or serviceworker) who think we are living in lives of advantage are actually disadvantaged in the ways that we are living. Whereas the disadvantaged can't find, access or utilize resources, we Super Heroes have the opposite problem: we believe we don't need resources or that others need them more than we do. Our failure to utilize resources available to us yields us the same result as someone who doesn't know about or who can't access resources: our well-being is less than optimal, or even compromised because we are not using resources that are designed to help us.

Through this book, I seek to illuminate and to address this health disparity of healers. Specifically, I hope to help you something that is actually a little funny if you stop to think about it: you are behaving as though you think you are invincible (like a Super Hero). This is because your failure to access and utilize the “3 S's” implies that you think you are beyond these basic human needs. (This may not be your intention, and in fact you may be an otherwise humble person that would never dream of calling yourself invincible or a

Super Hero – but your behavior is telling this, other story).

The truth is pretty simple. You and I are human. We both need self-care and social support to maintain our longevity (length of our lifetime) and our quality of life (how fun it is while we get to be here). And, at times our life will put us through certain types of events (stresses, or crises), in which we will find ourselves in need of extra (professional) services too. The combination of all three of these ‘S’s’ will help us to optimize both our health and our happiness: our longevity (health status); our physical, mental, social, emotional, and spiritual functioning (wellness); and our quality of life (well-being) are all improved by this powerful, “3 S” combination.

If you really are a Super Hero, about now you are thinking that the idea of the 3 S’s (self-care, social support and services) sounds great for other people – but that YOU don’t necessarily need all three of them. Or you are wondering how on earth you are supposed to make time for one, two or all three of them, because of course you have \_\_\_\_\_ to do first.

Of course, that reaction is exactly the problem.

So, although it may be hard to hear the truth, Super Hero, you will indeed need to embrace all three of these 3 S’s in order to ensure that your well-being optimized. Take comfort knowing that it’s not entirely your fault you are wired to resist this idea; but also take heed knowing that you’ve got to resist that Super Hero “resistant” lane of thinking enough that you can override it – so you really can make your well-being ultimatum once and for all.

One of the reasons that this line of Super Hero thinking is so hard to delete, amend or transform, is that your hardwiring (physiology) is supporting your current thinking pattern. Physiologically speaking, you really do get a “high” in helping others (as was mentioned earlier in this chapter). Just as your mind/body/heart/spirit feel great when you fall in love, your mind/body/heart/spirit feel great when you are acting in service to others. You also get a second “high” from feeling as though you are accomplishing your sense of “meaning and purpose”. People who feel that they are making a real (philanthropic) difference in the world have high well-being; those who identify with being world/change agents love being plugged into their (calling) work. The combination of the feel-good-feelings you get by helping others (engaging in social support) and working to heal the world (engaging in your meaning and purpose) provides a powerful and intoxicating “double shot” of happiness. Combine that shot with another dose of feeling as though society is supporting you – and it is because you are making a difference in the world and you are deemed to be successful at what you do – and you get a three-shot cocktail of joy. You feel happy doing what you are doing; and you have nothing, including your own thoughts, to stop you

As noted earlier, this feel-good-feelings of this dangerous cocktail can only feel good for so long. Whether it is because you find yourself having a “hangover” on a short-term basis (needing a retreat or a yoga class to put you back into balance), or you find yourself significantly exhausted and hitting your own personal

“bottom” (as is the case in compassion fatigue and burnout), the feel-good-feelings-will end eventually. Whether this moment happens because an external series of events brings you to it (as was the case with me) or it happens because you wake up one day realizing there must be a deeper sense of balance in your life, you will be ready to really make your well-being ultimatum once and for all.

So for you, Super Hero, this book is your own kind of recovery program. It will transform you from an unknowing victim of a quiet health disparity plaguing fellow professionals who work in healing, leading, caregiving and/or service professions, into someone that negotiates between your compelling need to help others and YOUR personal (self-care, social support, and services) needs.

As you make this transformation, and you begin to recognize and alter your Super Hero thinking, you will become a recovering Super Hero. I affectionately refer to recovering Super Heroes as Strategic Healers. Unlike the Super Hero, the Strategic Healer puts their self-care, their need for social support, and their “maintenance” endeavors (use of services) first. Without question. They do this because they know that this choice strategically optimizes their capabilities – by taking care of themselves they are optimizing their capacity to help others. They also have more energy because they are no longer weighed down by “carrying the weight of the world on their shoulders” and/or the heaviness of their own (Super Hero) masks.

Truth is a lot lighter, and more free, than being perfect all of the time.

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My objectives in writing this book for you, are therefore threefold. First, I hope that in making this well-being ultimatum, that you will no longer be afraid or reluctant to ask for help (social support) when you need it. Second, I hope that you will not hesitate to actually utilize whatever services are necessary (both within healthcare, alternative medicine and/or within your community) to ensure that all aspects of your health, wellness and well-being are managed and protected. And third, I hope that the book (and the process of creating your well-being ultimatum) will inspire you to engage in self-care practices daily that enhance your health, well-being, relationships and quality of life. A fourth, bonus objective, is that this process will transform you from someone who is an unknowing Super Hero into a Strategic Healer, and that you will become an advocate who encourages other Super Heroes to transform by your own example.

If you still have doubts, don't worry. Rest assured that this process will not ask you to give up your compelling need to help, lead, serve, teach, or heal others. It will not ask you to give up your "cape" (your call to help the world). However, it will ask you to take off that cape too as needed to ensure your well-being is truly optimized (subjectively and objectively) and in all dimensions (physical, financial, social, mental, spiritual/purpose, and emotional).

As noted above, future chapters will give you the information you need to tackle the creation of your well-being ultimatum head on. Chapter two will give a brief overview of the science of stress, crisis, compassion fatigue and burnout, so that you can better understand

why it is so important that you take care of your ‘stress management’ (3 S) needs. Chapter three will unpack the science of well-being, and why both personal (self-rated) appraisals and objective (other-based) appraisals are key to ensuring that your well-being plan not only feels good to you but is also good for all dimensions of you. Chapter four will unpack the dimensions of your well-being, by using the Kosha framework – I use the ancient yogic and Ayurvedic system of the koshas to explain why and how it’s important for all dimensions of your well-being to get along.

With this background information, as well as the call to action that I hope this chapter provides for you, I then take you through a strategic planning process which will help you to create your well-being ultimatum. In Chapter 5, you will create a vision statement which will articulate what you ultimately hope to give to the world. You will create a mission statement which will explain how you will go about achieving that vision in your own unique way. You will conduct a stakeholder analysis with yourself – you will ask all of the roles that you play every day to have a “meeting” and to discuss, negotiate, and compromise on a way forward that makes sense for your mission and your vision. You will also conduct a stakeholder analysis of the people in your life who represent the various dimensions of your health, wellness and well-being that are especially important to you.

If you are unfamiliar with stakeholder analyses don’t worry; this is an easy process of surveying key people who have a “stake” in your success. Most stakeholder analyses ask you to focus on the people



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who influence your mission. For a company, this may be a survey of customers, investors, board members, and employees. The findings are then collected together to determine a way forward that makes the best sense for all and which aligns to your vision, mission and goals.

Your external stakeholder analysis will similarly ask you to engage with people that you deem to be representative of the “company” that is you and your life. The list may include (but is not necessarily limited to) your doctor, your lawyer, your best friend, your spouse, your child, your parents, your personal trainer, your employees, your team members. The strategic planning process will help to illuminate who should be on this list, and it will be up to you to ensure that all of their perspectives are captured and heard.

Your internal stakeholder analysis will ask you to engage with a different kind of subcommittee – the various dimensions of your Self. The work of Mary Collier calls these self-dimensions your “role identities”. These roles are not just functions that you perform during your day – as mother, as teacher, as leader, as healer, as physician, as clinician – these are identities too. They are more than “parts” (roles) you play every day; they are ways that you identify with yourself and your interactions with your community, your culture, and the world.

As part of your well-being ultimatum you will be asked to get to know these “roles” in deeper ways, and to get them to metaphorically have a conversation with each other. It is an exercise in your imagination of course, but this particular piece of the well-being ultimatum process has proven to be very illuminating for every

client I have ever worked with – including and especially myself.

The combination of these external and internal stakeholder analyses will provide you with both subjective perspectives (your own) and objective perspectives (from the people that are important to you) of your well-being. This approach is unique (and more time-intensive) to most health coaching, which generally does not ask you to go and secure additional data from the people in your life. I ask you to do take this longer road (of conducting data collection) rather than simply writing down your goals as you see them right now, because I want you to have the benefit of both subjective and objective perspectives. I want you to not only reflect on your personal experience (i.e. subjectively analyze your role identities and how they do or don't get along), I also want you to have the opportunity to ask those who look out for your best interest to have a voice in your well-being process. As you will see in chapter three, when we discuss the science of well-being, this 360 degree (subjective and objective) view of your life will ensure that your well-being ultimatum plan really is designed and followed in ways that protect your 'best' (longevity and quality of life) interests.

After we have clarified your mission and vision statement, and have conducted these internal and external stakeholder analyses, it will be time to put the “data” together into what a business consultant would call a SWOT analysis. This asks you to come clean with yourself in terms of your “Strengths, Weaknesses, Opportunities and Threats”. This is similar to a navigation process when you are going on a trip: you decide where you want to be (vision), you decide

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why you want to go and what is important to you in terms of the experience of getting there (mission), and you assess what resources you have (within your own capabilities as well as external resources) that are available to you that you can employ to get from here to there in the way that you want to. The “SWOT” component simply helps you to be honest with yourself in terms of what is and is not available to you on this journey – and helps you to anticipate challenges (weaknesses and threats) as much as you celebrate your success (strengths and opportunities).

Once you have your SWOT analysis completed, you will then construct your way forward for your day, week and year. You will specify and outline the types of self-care, social support, and services you will need in order to balance your Super Hero drive in a strategic way. You will create a contract that summarizes this outline, and you will be asked to ask someone else in your life – someone you respect and trust – to sign your contract with you. This process has three major benefits.

First, it will help you to realize that your ability to keep or not keep your well-being ultimatum with yourself has repercussions in other dimensions of your life. Others that you care about are counting on you. Second, it will help you to stay accountable to your contract (because it will be supported by this public promise). And third, like most recovery programs that ask you to have a “Sponsor” in order to ensure that you are not trying to work the plan in your own deviant way that may become maladaptive, you will be asked to have a “Buddy” to help ensure that you do not find yourself steering

too far off of your (well-being) course.

In addition to mission, vision and SWOT statements, and your strategic way forward (contractual plan), you will also create an evaluation matrix which will help you determine if you are /aren't being successful in your efforts. By monitoring and evaluating your success on a regular basis, you can assure that you do not fall off of the (well-being) wagon, and you can also assure that you will be able to track the benefits of the changes you are making over time.

Through this comprehensive strategic planning process – from vision, to mission, to stakeholder analyses (both internal and external) to SWOT analysis, to daily/weekly/annual contractual plan, buddy system and evaluation matrix – you will ensure that the paradigm-level shift of your life that you have been seeking really does occur. As you can see, we aren't focusing on what a strategist would call tactics – another diet, another set of tips for cutting out fat, another program for exercise – we are taking a much more comprehensive and strategic approach to analyzing and improving the ways that you perceive, evaluate, experience, and engage with your life.

It is my ultimate hope that you will come to realize that your ability to perform like a Super Hero (help, serve and/or lead in the world) will only be optimized if you are willing to make a daily (self-care), weekly (social support) and monthly (services) commitment to your Self. You will know that your ability to save the world is compromised if you procrastinate these “3 S” needs for even one more day. You will know that you are of no use to anyone if you aren't here in the world in the first place – and the only way for you

to stick around here a little longer in the world is by maintaining these needs in ways that empower you. You will know that you have no choice but to make this ultimatum, because the thought of letting yourself, or anyone you lead, care for, serve, and/or heal down is too much to bear. These paradigm-level shifts in assumptions will enable you to optimize your well-being subjectively and objectively; they will shift not only your behavior, but your lived experience of “the good life”.

For all of these reasons, I call this a well-being ultimatum – because your quality of your life, and your longevity, really will not wait one more day. According to Merriam-Webster, an “ultimatum” is:

“a final offer or demand made by one party to another, especially in diplomatic negotiations, expressing or implying the threat of serious consequences or the breakoff of relations if the terms are not accepted.” (Merriam-Webster, 2015).

By this definition, the demand you are making is with yourself. The diplomatic negotiations you will be making are between your compelling need to help others (i.e. heal, lead, serve and/or teach) and your own personal, human needs for self-care, social support, and services (external resources). If you are indeed a Super Hero, you are most likely not negotiating between your Call to Service and your “3 S” needs – but you should be. In fact, serious consequences can occur for both the length and the quality of your life if this negotiation does not begin as soon as possible.

Hence, the time has come for you to see that there is indeed an implied threat, and serious consequences if the terms of such a

negotiation (between your self-care, social support, resource/service and call to heal) are not accepted. This threat is expressed every time – every day – that you forgo your own self-care needs to help and heal others. The consequences are felt by both the quality of your life (on a day-day basis and over time) and by the quantity of your life (your longevity). The minimum consequence that you face if you do not make this well-being ultimatum, is that your well-being is not optimized; you will not be living as well as you otherwise could have. The maximum consequence you face if you do not make this well-being ultimatum, is that your longevity will be threatened; you will not live as long as you otherwise would have. The irony is that either of these consequences (living well and living long) will get in the way of what you have wanted to do all along – heal others – in one way or the other.

So, yes, it is time that you make your well-being ultimatum – an ongoing commitment to the recovery of your well-being (quality of life) and longevity (quantity of life). Do it for you. Do it for your inner Super Hero. Do it for all of the people you help with the important work that you do. Do it for your physiology so that all of your systems can optimally handle your day-day stress and the major life crises that may occur for you from time to time. Do it for your sister, your son, or your grandmother, so that you can lead them by your example. Do it when no one is watching, and when everyone is watching. Just do it.

Make no mistake. Once you decide to make the commitment to your well-being ultimatum, you will have a lot of work to do. And,

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like any recovery program, this well-being ultimatum will be tough in quiet ways on a daily basis that in many cases no one will see except for you. As stated previously, it will require you to engage in “diplomatic negotiations” between your self-care needs and the compelling need you have to serve, lead and heal others. Like a recovering addict who must decide – in a tempting instant -- between the immediate gratification of a return to substance abuse and the long-term gratification that comes with a daily commitment to recovery, you will have tempting instants too. That addict must decide in the moment between the high of getting high, and the high of living well and preventing the “serious life consequences” that come with substance abuse from occurring. You too must decide between the immediate highs you receive from putting others first and the long-term protection and gratification of putting yourself first – and the consequences that accompany either of these choices.

This process of negotiating between your short term well-being (i.e. the physiological “boost” you get from helping others) and your long-term well-being (i.e. your comprehensive well-being and longevity) will require that you rewire some of your thought patterns. It will ask you to hold yourself accountable to your self-care, even when it’s messy (and you have to say no to someone, thing, or group in the world). It will shift the power at the bargaining and negotiation table, from the part of you that heals others, to the part of you that knows that self-care and the willingness to lean on others (social support and services) comes first. Period.

I will caution you here that the last part – asking others for help

– is often times the hardest part for any Super Hero. It's not surprising when you consider that in the comics, the only people who have helpers are the villains.

There is one exception to this rule: one Super Hero that asks for help. Batman. So if it helps take the edge off of the difficulties that you face in making this well-being ultimatum, you can decide that want to be like him. Like Batman, you will need to make time to retreat to the lair of your self-care, so that you can recharge (like he did with the batmobile, a key symbol of his power). Like Batman, you may need to allow others to serve you (like he did when he allowed his butler to fix his car). Like Batman, you may even ask for help when you are out of the lair of your self-care, serving and saving the world (like he did when he accepted Robin's assistance). And, like Batman, you may need to lean on other services for help (like he did when he and the Commissioner collaborated to rid the Metropolis of the bad guys).

You may be laughing at this analogy – but it's actually not funny. Most Super Heroes like you, are really uncomfortable with the lair (self-care), and/or are uncomfortable with receiving help from others who are close to them (social support) or from experts (services).

The other bit of hard news – which you should know before you read further – is that the process will be ongoing, long after the book is over for you. Becoming a Strategic Healer does not mean that we get to a place where we never have to work through this juggling act between our desire to serve and our self-care needs. On



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the contrary, it means that we are willing to be as honest with ourselves as we ask others to be in order to help them. It means that we've got to do the hard work ourselves, so that we can continue to learn, live and grow. If it helps to know, I am doing it too. Even as I write this book, I am balancing my self-care, reaching out for help, and receiving the support of services despite how uncomfortable all three of these sometimes make me feel.

Here's the best, and most freeing news of all: when you make this well-being ultimatum, you will feel a lot more free and energetic. That dynamic energy will help you to experience life in a deeper and heart-felt way, and will also give you more energy to do the very work you can't stop yourself from doing: service, leadership and healing. If this book has gotten to you a little late – you are already in a health crisis and/or your well-being is burned out or fatigued – it will help you to find your way back to feeling yourself again.

So don't worry. You are a Super Hero after all; you can handle hard work. Take that energy you give so willingly to helping, leading, serving and healing others, and throw some in your own direction. Apply that same tenacity you have to helping others, into the commitment to your self-care, so that when the negotiations between your self-care and your Super Hero get tough – and they will – that you (your well-being and your longevity) will always win. When you put your mind to helping others, there is nothing stopping you; why not put your mind to helping your Self too?

The truth is, that I am excited for you. Because when you decide to make and follow-through on this mandate, this well-being

ultimatum -- you will see an immediate improvement in the quality and the quantity of your life. Underneath the surface of your skin, your physiologic capacity to handle anything life throws at you (including day-day stress, difficult life events, and your compelling need to serve) will increase. This improved capacity will prevent, or manage compassion fatigue or burnout – exhausting conditions which plague super heroes that do not commit to self-care. Your health prognosis may even improve, because your self-care has many preventative health benefits. And, when you make and follow-through on your well-being ultimatum, your optimized health will enable you to be an even better super hero. Not only will you be able to do the work that you are compelled to do (to help, heal, lead or serve others); your behavior and lifestyle will quietly give others the courage to do the same for themselves.

At the end of the day, the world does not need another burned out Super Hero; it needs compassionate humans who have the strength to help each other back to peace, and still have enough energy left to enjoy their lives. We can only be of service to others, if we are willing to do the hard work ourselves – and that includes asking for help and making our health, wellness and well-being priority one. Our own strategic healing process is ongoing, and must be. For if we fail to honor the needs of our body, mind, heart and life, we will undermine the capacity we have to make a difference in the world.

So take off your cape, open your mind and roll up your sleeves. And let's begin.

## CHAPTER 2

### KRYPTONITE: WHY STRESS, COMPASSION FATIGUE AND BURNOUT FOSTER ILL-BEING AND THREATEN YOUR WELL-BEING

Most people cringe when they hear the word stress. The very word that describes what it feels like to be out of balance (have stress) can cause you to feel even more out of balance, because it reminds you of what it feels like to be out of balance. Simply put, thinking about stress can create the feeling of stress.

As noted by an article in *Psychology Today* (2010), your perception and/or experience of stress is actually based on your assumptions about a situation (stressful event) and not on the situation itself. In other words, if we believe that an event (a stressor) is bad for us, it will be. Our entire system is rigged to react to this stressor in a way that seeks to either remove ourselves from it (fly); get rid of it (fight) or ignore it and hope for it to pass (freeze).

However, if we believe an event is not bad for us (we have adapted to it), it won't be stressful (i.e. it won't create a stress-based

response). Our experience, our perceptions, our beliefs and our assumptions about an event come together in a way that can “make or break” that experience as something that deserves the “all points bulletin” of a stress response (or not). You might conceptualize this as a “surprise” – if you know something is coming and/or what to do about it, it is less surprising. Stress is similar in that if we know something is coming and/or what to do about, it is “less stressful.”

If you encounter a moment, a life event, or an experience as something that is familiar, and that familiarity gives you “no cause for concern”: then your stress response will be diminished, or may not even kick in in the first place. If however, you encounter a moment, a life event, or an experience as something that is not familiar – a surprise – then your sympathetic response will kick in and your physiologic abilities to flee, fight and/or freeze will go into high alert.

Your physiology will signal all of your systems to secrete the hormones and functions that you need to enact your reaction – your heart will start pounding faster; your digestive processes will slow/stop; your pupils will dilate. Whether you actually move away from the “surprise” (stress) or not; whether you freeze in fear or not; and whether you try to fight/destroy the surprise in some way or not – your body will have a physiological reaction that will prepare you for these endeavors, and this reaction may even continue as though these activities actually occurred. For example, your heart will begin pumping faster to anticipate your running away from the stress; your heart rate may continue at an accelerated pace for a while even if you never actually ran away.

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It is important to note here that your body doesn't know the difference between a "good" surprise (stress) and a "bad" one. This is why you felt as much of a rush of adrenaline when you had a friend startle you by coming around a corner unexpectedly, as you did when you saw someone you instantly fell in love with for the first time. Your and my initial reaction to both of these surprising (stressful) moments results in a physiologically identical "stress" response.

Counter to this stress response, we also have a balancing system – the parasympathetic system which gives our physiology and our entire mind/body/heart/spirit ecosystem the opposite experience. If you believe that you are not susceptible to stress (because you feel safe, secure and are not "surprised" by a moment, life event or experience) and/or you do not feel you need to "ramp up" and "rally" your capabilities in order to respond to an event, then your body will be able to flip out of the "stress response" and into this parasympathetic, or "rest and digest response".

It is important to note that the sympathetic response is the one we live in, and for good reason. We have evolved as humans because we have the human capacity to adjust to threats. If our physiology decided to take 'random breaks' and chose not to respond to the surprises that are laden within the world in which we live, we would find ourselves in vulnerable places that would not ensure our longevity.

It is also important to note here that we weren't designed to be in the sympathetic response on a 24/7 basis either. Much like a lion has bouts of running after prey, running from threats, and lying lazily

in the field under a tree – we were designed to balance our sympathetic needs with parasympathetic ones. Our health, and our well-being is compromised when we do not allow ourselves a sufficient balance between these two systems.

What is especially interesting about us humans, is that it really isn't the stress itself that creates our stress response. It's (1) whether or not your mind/body perceives the stress as being an “alerting surprise” – something new it hasn't dealt with before and/or (2) something that you find yourself needing to rally for or from in order to address. Just like your physiology will adapt to a run over time in ways that alter your mental, physical and social capacity, your physiology can also adapt to life events and situations over time as well. Your physiology adapts to the life events that you want to happen, and to the ones that you don't want to happen. It is your perception of the threat (stressor) – not the threat itself that matters.

Recent research in the area of health psychology has taken this understanding of stress a step further. Not only is our experience of a situation either stressful or not stressful because of we find it surprising and/or challenging; the ways that our bodies handle stress over time is also influenced by our beliefs. Simply put, if we believe that the experiences of “stress” is bad for us over time, it will be. If we believe that stress is actually an opportunity for our minds and bodies to adapt and/or become resilient, then stress does not have the same negative effects on our health, well-being and longevity. Recent studies have shown that people who think stress is bad for them over time have a higher mortality rate (die sooner) than those

think that stress is essentially their friend (McGonigal, 2015).

Putting this all together, you can see why stress management is not about “ridding your life” of stress. It would be naïve to think that you will never be surprised by a moment, life experience or situation again. Instead, stress management begins with accepting that although we are hard-wired to fight, flee, or freeze in response to any new stressor, we can manage ourselves during the moment we experience the surprise. We can decide if we will continue to treat the stressor as something we should fear, and continue trying to avoid, destroy or ignore (i.e. we can decide if we will stay in the conventional “stress response”). Or, we can get outside of the stress, and adapt to the stress, by deciding that the stressor is an opportunity for us to become stronger: the stress is greeted as a catalyst for us to adapt and change (improve our resiliency) over time.

By making these decisions, we can improve our “stress response” because stresses – both those we want (good stress) and those we don’t (bad stress) -- won’t be so scary or overwhelming. If we also buy into the assumption that this process is meant to be challenging, and complex (rather than easy), we can further ease the physiologic challenges that stress puts on our human (homeostatic) system, and we can also make a positive difference in the longevity and quality of our lives.

With this understanding that stress can be transformed from a foe into a friend, the discussion next turns to one way that you can make this transformation occur. The followings suggestions are drawn from the assumptions I make in my own life, and the guidance

I have given to clients over the years. It is a set of assumptions that has evolved over time; but it has not been scientifically measured or examined in great detail (at least not to my knowledge). I invite you to see if this approach works for you as it has for many of my clients.

Your ability to adapt to stress – both good stress and bad stress – is dependent upon your inner and external capacities.

I define your inner capacity as a combination of four things: (1) your self-efficacy (whether you believe you can do something); (2) your experiences thus far (whether you have actually handled the stress previously); (3) your self-concept (what you believe to be true about yourself) and (4) your “locus of control” – how much power you believe you have to direct the course and experience of your life. All four of these dimensions of your inner capacity work together, as a team, to help you to deal with stressors all day long -- usually without your even knowing about it. Your inner capacity is working behind the scenes (within you) to help you feel less stressed about the stimuli (stressors) that you face all day long.

Stressors that are familiar to your body, your mind, and/or your lifestyle do not feel stressful, because your inner capacity knows how to handle them. You might say they “see the stress coming.” This is because once your mind (mental capacity), body (physical capacity), and/or heart (emotional capacity) adapt to a stress, this inner capacity knows what to do. Your adaptation to the stress occurs because you believe you are capable (i.e. you have high self-efficacy for dealing with the stress); you have handled something similar (i.e. you have experience dealing with the stress or a similar



one); you believe in your Self and your abilities (i.e. you have high self-concept) and/or you believe you have control over what occurs (i.e. you feel you can direct the stressful event to a favorable outcome). You think you could handle it (self-efficacy), you have handled it (experience), you can handle it (self-concept) and you are optimistic of success. Most of the time, this all happens without your actually thinking about it – hence the term inner capacity.

Your ability to adapt to stress is not only supported and enhanced by these four dimensions of your inner capacity, it is also reinforced and supplemented by your external capacity. My definition of external capacity has two components: (1) tools (including services and other resources) and (2) a team (people). Research has shown that people who have strong social support (a good partner and/or team) and/or feel that they can rely on services (medical, community, or other programs) have higher well-being. To use a phrase used in law enforcement, your external capacity is your “backup” – it reinforces and supports what you can do alone in protective and complimentary ways much like one officer’s skillset reinforces and supports another’s.

Together, inner capacity and external capacity help you to manage, ameliorate and adapt to the experience of stress. They work in tandem like guards – by helping you to ‘fight’ (manage, ameliorate and/or adapt to) stress, they protect and optimize your well-being. Together they remind you that you are strong enough to handle (manage) stress, and that even in this strength, it is OK to lean on others for help.

Where this approach to inner and external stress management capacity can be helpful, is not when these capacities are working well and are functional; when things are “easy” for us in terms of stress management we may even forget about them. Instead, where they are actually more helpful is when we find ourselves in “times of trouble” – stress and/or crisis.

In a real life, tough, moment that pushes us to our edge, it is helpful to unpack whether or not we are feel our inner capacity and/or our external capacity is compromised. Maybe the feeling of being pushed to our edge is happening because we aren’t sure if we can take on the stress (i.e. have low self-efficacy). Maybe it is because we have not had experience with something similar; we don’t know if we are strong enough and/or we don’t know if we have the power to direct an outcome that we hope for. All of these fears result in our diminished inner capacity to handle the stressful event (stimuli).

In much the same way, compromises to our external capacity can also leave us overwhelmed by stress. If we don’t allow ourselves to ask for “back-up” – either by leaning on others for support (team) and/or for expertise and services (tools), then we can easily become overwhelmed trying to do it all ourselves.

This feeling of being overwhelmed by stress creates the experience of ill-being – the opposite of well-being. It therefore diminishes our ability to optimize our well-being; if we are overwhelmed by stress our well-being is compromised.

As noted in chapter 1, this is the fundamental issue with Super

Heroes – although they generally have high inner capacities they often fail to build and/or utilize their external capacity. This creates a scenario that can manifest ill-being, and threaten the optimization of their well-being.

And this is one of the reasons that I wrote this book. Tools exist for stress management and well-being promotion, which can help people to optimize both their inner and external capacities, and therefore optimize their well-being.

It has been my experience that people who are hard-wired to think like a Super Hero (see Chapter 1) do not take the advice to improve and enhance their inner and/or external capacity easily. More often than not, it takes a moment in which “the universe” gives them a mandate of some kind. Whether it is a call-to-action from a friend, a health scare, or a financial crisis, the time comes when the need we have for capacity building – for back-up -- arrives. We often are left with no choice but to build it and enact it in order to get out of ill-being (stress/crisis) and back to well-being.

Leading up to this moment, there are often warning signs leading up to this point-of-no-return for our well-being. Sometimes people see these warnings, before the “universe” forces them to address the (stress) issue. Other times they don't.

Allow me to explain what I now know to be warning signs, that I wish someone had told me about several years ago – before I had my own well-being crisis.

In scholarship, we actually have “formal” (evidence-based)

names for these warning signs, and they come in two seemingly similar, but actually unique types. The clinical condition (secondary stress disorder) of Compassion Fatigue is one, and Burnout is the other.

Both Compassion Fatigue and Burnout feel draining – but in different ways. Compassion Fatigue makes us wonder “Where did my energy go?” and “Why can’t I push through this?”. We find meaning in what we are doing (i.e. healing work), but we feel we don’t have enough energy to take it on or perform to our full capacity. We quietly hope the feeling of being drained will disappear at some point if we just push through a little longer, a little harder. We keep chasing our well-being – and exhaust ourselves the more we try to run/push towards it.

Compassion Fatigue has been described in the Medical Dictionary (2009) as “cynicism, emotional exhaustion, or self-centeredness occurring in a health care professional previously dedicated to his or her work and clients”. It has also been described as “the continuing stress of meeting the often overwhelming needs of patients and their families” when discussed in nursing contexts (Lombardo & Eyre, 2011). Both of these descriptions, as well as others, illustrate the overwhelming nature of Compassion Fatigue.

Author Patricia Smith, a leading expert in the field of Compassion Fatigue, has developed an assessment protocol to test individuals for Compassion Fatigue. (See her website [compassionfatigue.org](http://compassionfatigue.org) for resources). Her work emphasizes the importance of self-care practices, as well as social support, in the

prevention and/or healing of compassion fatigue. As she notes on her website:

“When caregivers focus on others without practicing self-care, destructive behaviors can surface. Apathy, isolation, bottled up emotions and substance abuse head a long list of symptoms associated with the secondary traumatic stress disorder now labeled: Compassion Fatigue” (Smith, 2015)

When considered from a capacity perspective, Compassion Fatigue is an issue of one’s inner capacity being overly emphasized and one’s external capacity being underutilized. The individual may have the belief (self-efficacy) to help, lead and/or serve others; experience in doing so, belief in themselves and even believe that they can somehow control a difficult (healing) outcome; however, they do not allow themselves to rely on external capacity resources (teams and/or tools) in ways that adequately support and protect these efforts. The result is that the person feels as though the “weight of the world is on their shoulders” -- and it is. They are relying on their inner capacity without relying on other world-based (external) resources for additional support in order to handle stress: both the stress that comes from their healing work, and the everyday stresses they experience as a human.

At some point, the world becomes too heavy, even for this Super Hero.

Burnout is a more existential problem than Compassion Fatigue: it makes us wonder “Why am I doing this to myself?” If Compassion Fatigue is about chasing our well-being, hoping it will return if we just try a little harder, push a little more, and/or run a

little faster to “catch up to ourselves”, then Burnout is about standing still and wondering why we were running in the first place.

Burnout is described as “the condition of someone who has become very physically and emotionally tired after doing a difficult job for a long time.” (Merriam-Webster, 2015). It therefore may bring a deeper sense of exhaustion than Compassion Fatigue – much like a “bottom” moment feels a lot deeper and bigger for an addict than a hangover.

Most of the measures of Burnout examine issues surrounding Engagement; in fact, Burnout and Engagement are considered as being (almost) polar opposites of each other much like Depression and Happiness are viewed as being (almost) polar opposites. Burnout can even be understood as a form of Depression; it can bring with it a detachment from everything including the things that used to bring us joy. (Author’s Note: if you are experiencing a feeling of being “drained” you should have a clinician administer a Depression screen to diagnose whether or not your experience is resulting from Depression, Compassion Fatigue, Burnout, or something else).

Not surprisingly, Super Heroes are as vulnerable to Burnout as they are to Compassion Fatigue. Although they can present in similar ways at a surface level – the Super Hero feels overwhelmed and/or drained of their normal energy levels – they are different in large part because they emanate from different problems regarding capacity.

As noted previously, Compassion Fatigue stems from external capacity being under-utilized; inner capacity is over-relied upon and

external capacity is either ignored or under-utilized. Burnout occurs when inner and/or outer capacities are under-utilized and/or under-prepared for the task at hand. If Compassion Fatigue is an imbalance issue (between inner and external capacity), Burnout is an endurance issue (where either inner and/or external capacities have been exhausted over time, and are in need of restoration and/or new resources for replenishment, revitalization and/or support).

It has been my experience that more often than not, most Super Heroes do not know that they are suffering from Compassion Fatigue or Burnout. They are too busy helping others, until a situation “forces” them to take a deeper look at why they are feeling tired, overwhelmed, and/or drained.

If the Super Hero is challenged by Compassion Fatigue, their external capacity is compromised because they do not perceive themselves as needing, or wanting help. This is because their inner capacity is otherwise strong. In fact, they view the act of asking for help (building and/or using external capacity) as a sign of inner capacity weakness. They believe that asking for help implies that they are not strong (internally) in the first place. We must help them (you) to reconsider that asking for help does not have any bearing or implication on inner capacity; instead, it reinforces and amplifies it. In the police officer example used earlier – just because one officer calls for backup does not mean that that officer is weak; it means that they are smart. And Safe.

If the Super Hero is challenged by Burnout, their inner and external capacity (if they are using it) have hit some type of wall. Just

like a runner hits a wall in a long-term race; no matter how much training they have had they often report that they experience a “feeling as if they can’t go on” at some point or another – so too can a Super Hero eventually hit a wall over time. In that moment, that moment of “stopping in one’s (Super Hero) tracks” the Super Hero has to decide if they will regroup, recharge and proceed forward, or leave the field all together.

Whether it is the energy imbalance issue of Compassion Fatigue (which results from too much outflow relative to inflow) or the energy endurance issue of Burnout (which results from too much performance demand on existing inner and external capacities), the result is the same. The Super Hero no longer has well-being, because they are physically, mentally, emotionally, socially and even spiritually drained. Their inner and external capacities are not being utilized in ways that can optimally handle stress.

And this is why I wrote this book: the world needs Super Heroes who are ready, willing, and able to handle their life stress, as well as the stressful work that they do. The world needs teachers who aren’t so tired that they can’t teach; leaders who aren’t so exhausted that they can’t lead; parents who aren’t so depleted that they can’t parent; clinicians who aren’t so ill that they can’t heal others; military members who aren’t so stressed that they can’t serve. These healer’s important, life-changing and healing work is compromised if the very person delivering these services – the Super Hero -- can no longer accomplish their healing / calling because they are drained by (Compassion Fatigue) and/or (Burnout).



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We need Super Heroes to not be overwhelmed by stress; we can't have them falling victim to the kryptonite of thinking that they don't need to restore and renew their inner and external capacities. We really need these Super Heroes to instead optimize their well-being by optimizing their inner and external capacities – and in so doing their well-being. If we really are going to have a better, safer, more healthy world, then we've got to start by taking care of our Super Heroes – like you.

And that is why in chapter 1, I explained that this book is dedicated to helping you to better understand and manage your well-being once and for all. By making efforts to build and manage your inner and external capacities (which are foundational components of this well-being ultimatum) you can both manage the negative effects of long-term stress, and optimize your well-being. You will be better equipped – internally and externally – to handle the stressful demands of your (healing) work, and your high stakes life. And the world will benefit from a more optimal, health, and happy you.

You will notice that the fundamental suggestion I make throughout this book -- that Super Heroes need self-care, social support, and services just like the everybody else – is essentially an easy-to-adapt framework for building your inner and external capacities. All three of these “S's” will help you to improve your stress balance (i.e. take temporary reprieves in the parasympathetic land of ‘rest and digest’) as well as your stress response (i.e. optimize your ability to ‘fight, flee or freeze’ as you need to in your Super Hero work and in your life).

You will see that in Chapter 5, I will walk you through a specific process of determining which self-care, social support, and service needs may be right for you. But before we go there, I would like to first unpack for you the science of well-being. In chapter 3, we will examine the surprisingly complex and at times confusing landscape of well-being science, and you will learn why both subjective and objective analyses of well-being are important for writing your whole well-being story. In chapter 4, we will unpack the major types of your well-being by using a Kosha-based framework. Together, these two chapters will help you to have a more informed perspective of the “sides” of your well-being (subjective and objective) and the “types” of your well-being (physical, financial, social, mental, purpose, and emotional). By understanding these “broad and deep” perspectives of well-being, you will be better equipped to take on the craft of developing your well-being ultimatum strategic action plan.

# CHAPTER 3:

## THE WHOLE WELL-BEING STORY: WHY SUBJECTIVE AND OBJECTIVE VIEWS MATTER IN THE OPTIMIZATION OF YOUR WELL-BEING

In chapter 1, we discussed why Super Heroes like you may need a well-being ultimatum. In chapter 2, we discussed how stress, crisis, compassion fatigue and burnout foster ill-being as opposed to well-being, and how they can impede your ability to handle the stresses that occur both in your work (your “calling” to heal, lead and/or serve others) and in your life. In this chapter, we will unpack the science of well-being -- to explore what well-being is and isn't, and what that means for you, your work/life balance, your longevity and your overall quality of life.

If you ask your friends what the term well-being means, you will no doubt hear many answers. If you ask a group of scholars representing a diverse array of fields in the humanities, natural sciences and the social sciences, you will also hear many answers. As one scholar I know mentioned to me when I explained that I would

be studying well-being as part of my doctoral dissertation work -- “the only thing that well-being scholars agree on is that none of us can agree on what well-being is or isn’t.”

Taken from a scientific perspective, you have to admit this is actually a bit funny. If you are a chemistry scholar, you know what chemistry is. If you train to become a physician, you know what medicine is. And yet, in well-being science, the one thing that we well-being scholars agree on is that we don’t know exactly what well-being is or isn’t -- because it is largely defined and experienced by each individual in a different way.

But that ambiguity didn’t stop me from trying to figure out what it was -- as a person and as a scholar. In fact, my entire professional life has been dedicated to either finding, promoting, coaching and/or researching well-being. Early in my career, I studied and created theatre in an effort to better understand life through the power of story-making and story-telling. Later, I studied biomechanics (kinesiology), yoga therapy and the Pilates method to understand the “mind/body connection” that many would say is a hallmark of living well, and achieving well-being. And most recently, I dedicated two years of my life (2012 - 2014) to studying well-being and its promotion as part of my doctoral (dissertation) work.

After all that time, energy, research, and contemplation, I can tell you that essentially I have come full circle. Well-being is unique to each of us, and largely depends on our stories -- the ways we tell them to ourselves, to our family and friends, and to the world.

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I came to that conclusion though only after I tracked what other scholars had to say about it -- and not all of them would agree with me. I'll try to summarize the scholarship here, knowing that (1) no matter how succinct I try to be, it will still become complicated and (2) not all scholars will agree with my take on well-being that you're about to see. Still, if you are making a well-being ultimatum, you should at least have an understanding of the disagreements and the discourse surrounding well-being.

So here goes.

Your well-being comes in two essential types: subjective and well-being. Subjective well-being is where most well-being scholarship lies; this approach to well-being assumes that the individual gets to decide what well-being is, and how they rate their experience of this definition. This is why well-being is so hard to define from this perspective: each individual conceptualizes what it means to "live well" and/or in a "good life" in their own unique way based on their own unique circumstances.

We find that subjective well-being (SWB) occurs in three main types. First, some believe that SWB is about how you feel about the experience of your life and/or your lived experiences; happiness is an example of this. You can be happy about the fact you had lunch today; and you can be happy you met the man of your dreams. Sometimes our happiness can get complicated when we try to apply it in to specific dimensions of our life; happiness in one area does not always imply happiness in another area.

The second type of subjective well-being that is widely-accepted is based in how you evaluate your life and/or your lived experience; life satisfaction is an example of this. You can be satisfied with the way your day went (because you were able to spend time with a friend) and/or you can be satisfied with the fact that your job is rewarding. Like happiness, sometimes your life satisfaction can get messy and complicated -- when you shrink and/or expand what it is you are evaluating (i.e. your life, your work, your work/life balance, etc.). For example, your recent promotion may have been something you were professionally “satisfied” but personally “dissatisfied” by. If your promotion disrupts the amount of quality time you have with your family and friends, you may find the promotion as not bringing you the work/life balance dimension of life satisfaction, even if it did bring you a sense of professional advancement (life) satisfaction.

The third type of subjective well-being can be a combination of these two “affect” (happiness) and “cognitive” (life satisfaction) SWB types; quality of life measures are an example of this. These hybrid instruments are most-often used to measure your comprehensive well-being. The well-being WHO-5 measure used in this book is an example of such a quantitative “hybrid” measure. Your quality of life can change easily over time, depending on life events and your perceptions (feelings and thoughts) about them.

So, if we stop here for a moment, you can see why so many people have difficulty in living well. The (affect) experiences of their well-being that result from the multiple dimensions of their life don't always get along; the (cognitive) evaluations of these experiences and

their life as a whole don't always get along; and these experiences and their evaluations are not always internally consistent. Happiness does not always imply life satisfaction and vice versa. What makes us happy or satisfied in one part of our life may make us unhappy in other parts, and vice versa. Quality of life does not always stay consistent when we measure our experience of life over the course of a week, a day and/or a year.

Subjective well-being, according to most scholars, is therefore truly in the eye of the beholder: we get to decide if affect, cognition, and/or a combination of the two are important to us in the ways that we understand well-being, and we get to decide what life experiences will bring us closer to these self-designed and self-interpreted standards.

My colleague and friend Erik Angner uses the term “preference hedonism” (Angner, 2009) to describe this self-directed nature of subjective well-being. His work shows that when we are living in the ways that we prefer, we are more likely to be happy. But he also challenges all of us to consider these preferences against legal and moral structures; just because we are thinking, feeling and/or doing what we want does not mean that it is good for us, those around us and/or for society.

That next layer of complexity – where our own needs meet up against social, legal, ethical and moral structures -- is where objective well-being comes in. I have come to realize that the many different types of objective measures of well-being that exist, can all be summarized as “other-based evaluations of your life and/or lived

experiences”. Your safety, your security, and your welfare can be self-evaluated (looked at subjectively by the individual) but these dimensions of well-being are actually best-understood when some “other” party evaluates them. For example, my sons may believe that their safety and security is high but they may not know that I perceive their choice to be out past curfew as a not-safe option (which jeopardizes their well-being). I, as their “other,” am considering factors that they may not have thought of or known about, such as crime rates, the increased prevalence of drunk drivers after 1 am, and the sleepiness they may experience at the wheel (if they drive after curfew) as an impairment to their well-being. In addition to individuals as “other” (as is the case in this example), groups, agencies, and guidelines (i.e. legal, ethical, financial, psychological, sociological) can all be considered as “other”.

Just as not all dimensions of subjective well-being do not always get along, your subjective and objective well-being do not always get along either -- which makes the your well-being ultimatum that much more difficult. For example, I can be happy that I am drinking water (affect); feel satisfied with myself that I am maintaining my health (cognition); and therefore perceive/rate my well-being as high for the day(subjective well-being). However, I may not know that someone who was ill used the glass without my knowing (I am unknowingly more susceptible to disease) and/or that the water I am drinking has a public health-concern (an unannounced health crisis). Subjectively, I understand the drinking of the water to be a good idea. An “other’s” evaluation (my friend, my doctor, my



public health official) would know otherwise, and would challenge my positive self-rating with a more negative (objective) appraisal.

Have I confused you yet? Rest assured, I was confused too - for two years as I chased these various components of well-being and tried to define it. In fact, the more I tried to define well-being, the more contradictions I seemed to find.

This realization that well-being definitions can be contradictory and also confusing, led me to offer the following alternative approach to “defining” well-being:

Although well-being is difficult for scholars and the public to define, it functions as a communication (sensemaking) process in which the individual makes sense of health outcomes, role identities, life situations, and/or lived experience. (Carmack, 2014)

As you can see, this approach puts you in the driver seat: it implies that you get to make sense of your life as you need to and as you want to, and that as you make sense of your life, so too will your well-being improve. As mentioned above, I have come full circle to believe that it is the ways we tell ourselves our story, the ways we tell our stories to others, the ways that others receive that story, and the meanings that are created in the world from these acts of story-telling that collectively influence both our subjective (self-rated) and objective (well-being).

This is why this text recommends in the creation of your well-being ultimatum plan, that you combine both self-appraisals of your well-being with objective ones. In order to optimize well-being we have to see both of its sides: we need to be sure that the process of

defining, assessing, evaluating, and strategizing our well-being acknowledges both our subjective and objective well-being perspectives. If we focus solely on objective well-being approaches (i.e. others' appraisals of our life), then our unique and individual voice (and perceptions of what is and is not important) will be lost. And if we focus solely on subjective well-being approaches (i.e. we make sense of our life however we deem appropriate), then our self-rating will not be "checked" by external (other-based) assessment.

You will therefore see in the well-being ultimatum strategic planning process (chapter 5) that you will be asked to not only complete a well-being questionnaire (which will help you to assess your subjective well-being) you will also be asked to choose several key individuals in your life to (objectively) evaluate your well-being. In this way, you can potentially give yourself a "360 view" of your well-being, by receiving inputs and feedback from the people that represent your both sides of well-being.

For example, you may rate your quality of life as generally high (8 on a 10 scale), but you may have mixed feedback from your "team of experts." Your spouse may agree that your well-being is good; but your child may perceive you as more stressed than "well". Your doctor may perceive you as delinquent on your maintenance appointments (i.e. you missed your mammogram) and your lawyer may be still waiting for you to complete your will paperwork. In this example, you have a high subjective well-being but a mixed objective well-being result. In this case, you would develop a well-being ultimatum plan that helps you to optimize the areas of your well-

being that are currently working well, while tackling the areas that are insufficient and/or delinquent – on both subjective and objective sides of the well-being house.

I encourage you to take a moment now and to consider what well-being means to you -- based not only on the discussion thus far but also about your life and how you live it. How would you self-rate it? How would others self-rate it?

Interestingly, the most common response I have received to that first question -- “what does well-being mean to you” -- is silence. Every person I have talked to pauses before they answer, on average for 2 – 3 seconds. This initial hesitation to answer the question is an indication that most people often have trouble articulating, or defining the term well-being. In this moment of silence, I can almost see the computer that is their mind running an analysis trying to consider what well-being does and does not mean for them. Once they do come up with an answer, there is more often than not hesitation in their pace and/or in their tone. It is like someone is asking them to give a book report on a book they haven’t written; they aren’t sure if their answer is “right” for them or for me.

In my doctoral research process (Carmack, 2014), I conducted 38 in-depth (hour-long) interviews with individuals varying in age and demographic profiles. I began each interview asking all of these participants to explain what well-being meant to them. Here is a breakdown of the key terms used responses. Keep in mind that each participant used an average of 3-4 responses, which is why there are almost 4 times as many responses as there was participants (n=38).

Take a look at the list below, and see if you recognize any dimensions of well-being that you would agree or disagree to. And, consider whether or not there are any dimensions of well-being that are not included on this list.

- Mental, n=23
- Physical, n=21
- Healthy, n=18
- Goals/Accomplishments, n=15
- Emotional, n=14
- Calm and Content (No stress), n=14
- Spirit, n=9
- Balance in Life, n=9
- Happy, n=8
- Social, n=7
- Taking Care of Self, n= 7
- Hope, n=3
- Wellness, n=1

As you can see from the data set above, only half (18) of the participants in my study used the term health or healthy to describe what well-being meant to them; only 8 of them used the term happy; and only 1 of them used the term wellness. Although this is but one study, these findings challenge the traditional practice of using the terms health, wellness and well-being interchangeably, and the traditional practice of using the terms happiness and well-being interchangeably. Both the diversity and the quantity of these answers support my premise here -- that well-being is much more

complicated than traditional notions of it being synonymous with the terms “healthy” or “wellness”.

Another interesting finding is that none of the participants used the objective well-being term welfare, or the subjective well-being terms quality of life or life satisfaction in their description of what well-being means to them. This is significant since these terms are often used in the literature to describe well-being; in fact, metrics based on these terms are widely-used to evaluate well-being. This may be caused in part by the fact that most people do not wake up saying “I have a high quality of life today” or “I have high satisfaction with my life today” – despite the fact that a survey may indicate that this result is or is not the case. Nevertheless, the fact that people do not say these terms is an important factor that well-being scientists like me should consider further when designing and analyzing research studies -- are we really measuring quality of life, life satisfaction and/or welfare? Or is there something else we should be looking at?

One way to bring these theoretical questions into a real-world context, is through a case study. You will see the competing needs of my subjective and objective sides of well-being present themselves in very real ways:

#### CASE STUDY (ME)

I wake up knowing that I have a big project due for work by 10 am. I choose not to go on my morning run because I want to meet the deadline, and I do not perceive that I have the time to both run

and complete the project. This decision came out of my desire to “optimize my career well-being” -- and consequently my financial well-being. My subjective self-rating of this decision is high, because I believe that my career well-being, and my financial well-being should take precedence, because it is a weekday. In this moment, these types of well-being (career and financial) have taken precedence over my physical well-being.

However, despite the fact I would self-rate this decision as a good one, I may not have a full, 360 degree view of my whole well-being story. For example, I may not realize that my choice not to run is actually detrimental to not only my physical well-being, but also my career well-being (and consequently my financial well-being). This is because my personal trainer, if given the opportunity, would objectively evaluate my well-being as low. He would do this because he knows what I do not -- that this choice not to run will have a negative effect on both my longevity (physical well-being) and also on my ability to write and think clearly (career well-being). If I did not know that research shows that movement and exercise can increase our cognitive capability, I would not realize that my choice not to run was actually not the right choice for my comprehensive (subjective and objective) well-being. I wouldn't have that objective well-being perspective.

As you will see in the well-being ultimatum planning section of this book (in Chapter 5), I suggest that you balance your subjective and objective well-being by ensuring that you allow yourself to have

both subjective and objective appraisals of your well-being. In the case study noted above, I would never have perceived my choice not to run as bad for my career well-being if I had not received the objective appraisal of the personal trainer. Many people similarly fail to realize that what they think is good for them (subjectively) is actually not (when seen from both subjective and objective perspectives).

The reason I am so adamant about this recommendation -- to balance your subjective well-being self-ratings with objective other-based evaluations -- is because this is the fundamental problem that Super Heroes have. Those who live to heal, lead, and/or serve others as healers are so concerned with helping others (living to their meaning and purpose, a dimension of subjective well-being) that they often forget to balance this drive with objective well-being practices. This is why the plan will ask you to commit to your self-care on a daily basis, your social support on a weekly basis, and your use of services on a monthly basis.

All three of these “S’s” (self-care, social support and services) will help you to build your inner and external capacities, and in so doing, to balance and optimize your subjective and objective well-being. Self-care will not only help you to boost your mood and/or your quality of life (both subjective well-being dimensions, it will also help you to manage and prolong your longevity (objective well-being). Social support will help you to also have a higher mood and quality of life, and will ensure that you have some “accountability” for your life choices by those who play important roles in your life.

Services will likewise help you to ensure that your subjective and objective well-being needs are met; service-providers can not only help us to feel good in the moment (fix a problem for us) but can also help us to be cautious about areas that we may not have realized we had problems in in the first place. For example, we may feel good getting our current financial house in order (subjective well-being) but our financial planner may help us to also discover the importance of planning for our retirement now (objective well-being)

Because of the ability of these “three S’s” to simultaneously optimize your subjective and objective well-being, I have built this entire well-being ultimatum plan around them. You will see in the planning section that I will ask you to commit to the following Self-Care practices on a DAILY basis: (1) movement and mobilization (don’t think exercise exclusively although that counts); (2) practicing mindfulness and positive self-talk, especially gratitude, ideally to begin your day; (3) eating as “clean” as possible and as needed for your daily fueling and medical requirements; (4) detoxing yourself from electronics/digital devices for at least 1 hour per day, ideally at the end of your day; (5) attending to your daily medical needs as appropriate (i.e. taking medication for a chronic illness or attending a daily meeting for a recovering program); (6) committing your whole self (mind, body and heart) to engaging in one non-work-related endeavor; and (7) sleeping at least 6.5 hours per evening.

Please note that if this seems like a long list, that may indicate that you really need to make the ultimatum; these are not outlandish requests. Each of the above recommendations are in fact all basic



evidence-based guidelines for healthy living today. If it helps to feel less daunting, some of these areas can be combined. For example, your daily practice of movement may also be combined with your mindfulness practices and your “whole self” commitment to a non-work endeavor.

Committing to the second “S” -- social support -- on a WEEKLY basis will ensure that you do not become isolated; this will help you to enjoy the “physiologic bump” we get when we spend time with those we love (subjective well-being), it will also decrease the likelihood that you will have a false sense of security in your life choices and endeavors (help you to manage your objective well-being). Our family and our dear friends have a way of calling us out when we make choices that we think are “a good thing” but may not actually be so good for us. For example: have you ever had a friend who believes they are in a great relationship, but you are worried it isn’t so healthy? You have the gift of being able to see their relationship objectively, even though your friend cannot (they are living in the subjective experience).

A weekly commitment to social support is not only important to keep our relationship and other life choices in check; it is also an indicator of your ability to find work/life balance and to live “well”. Those who are engaging in addictive behaviors (both workaholics and those addicted to substances) often withdraw from their major relationships -- partly because they are so consumed with their addiction and partly because they do not want to “face” the people in their lives they know may call them out on their maladaptive

behavior. This is one of the ways we actually define addiction -- when choices we are making are causing trouble for our major relationships.

To illustrate this in a real-world example: a few years ago, I would often cancel my lunch and coffee dates at the last minute because something came up. I started to notice a pattern that the something that came up was always work-related. Sadly, the situation escalated to the point where I stopped scheduling coffees and lunch dates at all; unless they were work related. It was only through additional outside support -- therapy -- that I was able to see how destructive this pattern was, and to face the fact that I was exhibiting “textbook” workaholic behavior patterns. At the time I was canceling the appointments, my subjective well-being was high; however, my friends and family would have rated my (objective) well-being as low or at least challenged. It wasn’t until a friend pointed out to me that I was canceling a lot of our coffee dates, that I considered that this pattern may not be so healthy -- and I pursued help for it.

So this well-being ultimatum will recommend that you make time for social support weekly in order to optimize your subjective and objective well-being -- both to ensure you have the accountability that comes from your deep relationships and to ensure that you are spending your work/life time in ways that are adaptive (and not maladaptive). You get to decide how long these “bouts” with your friends and family members may be -- and what form they take (a workout, a Skype call, a lunch date). But you don’t get to let this weekly commitment go; because your social support is a vital

component to ensuring that your well-being needs are being kept in balance. The good news is that we really do know that social support is not only good for you (optimizing your well-being as discussed here). Social support makes us feel good; my dissertation work (Carmack, 2014) found that social support is not just correlated with -- it predicts -- all dimensions of well-being (physical, mental, emotional, social and comprehensive).

The third “S” that I recommend for your well-being ultimatum, in addition to self-care daily and social support weekly-- is “Services” on a MONTHLY basis. This “S” is a bit more complicated to explain than the first two, because how you enact this “S” really does depend upon the particular elements of your life and your life story. Your “service” dimension of your well-being ultimatum is admittedly a “first world problem”; it is something that is a unique challenge for those of us Super Heroes living in developed countries. It is an evolutionary trade we have made for our modern lifestyles. While those in less-developed countries may conceptualize their “service” component as the individual’s willingness to seek out help and support from others on an informal basis, those living in more-developed countries will do this as an “act of commerce” (hiring and/or bartering with them).

No matter how we get these services (through donation, through bartering, and/or through hiring), we all will find ourselves from time to time having stresses (life events) for which we need external support (See chapter 2). Please keep in mind that under services I not only group the “services” that we need for our legal,

financial and professional lives, I also include any service that enhances your dimensions of well-being. These service needs can include -- but are not limited to -- your basic legal, financial, ethical, mental, physical, medical needs. They can also include other “first-world” needs such as your car’s needs for ongoing maintenance and mechanical work and your personal “beauty-related needs”.

Another reason why this particular “S” (service) is especially difficult to employ in your well-being contract, is because Super heroes like you -- those who live lives dedicated to healing, leading and/or serving others -- often have some pretty strong biases about which services they consider acceptable and those that are not.

For example, many Super Heroes that I have worked with have no problem asking for help with the updating of their hair and/or nails, the drawing up of their will, or the maintenance of their car. However, these same Super Heroes do not believe it would be appropriate for them to visit a mental health therapist and/or a physical therapist. They believe this because they (falsely) view these or other “service needs” (such as mental and/or physical difficulties) as something that they can just push through.

Super Heroes don’t like admitting that they need these services, because it means that they are vulnerable. They don’t like that their request for (service) help indicates what they perceive to be a vulnerability that compromises their ability to heal, lead and/or serve. To quote an old commercial from the 1980’s -- Super Heroes don’t like to have you (or anyone) see them sweat. (For more on how your willingness to show, rather than hide, your vulnerabilities -- and how

this is actually an expression of power -- please see the inspiring work of Brene Brown). Of course, they don't realize that nothing could be further from the truth. If they would only ask for help, their capacity to be of service would be strengthened (and not diminished as they perceive).

Together, these three S's (self-care, social support and services) will help you to ensure that both your subjective and your well-being needs are not only met, but optimized. This well-being ultimatum is dependent upon this balance of your subjective and objective well-being needs. And it is for good reason -- your subjective well-being (your "preference hedonism" to use the term from Dr. Angner, 2009) only tells one half of the your well-being story. Research shows that narcissists, addicts and workaholics all self-rate their well-being as high; the self-involved are happy even when that self-involvement is not good for them and/or is not good for others.

**Your Subjective (Self-defined and self-interpreted) and Objective (Other-based) Well-Being Components Give Us Your Whole Well-Being Story**

To summarize, this book – this guide to creating your well-being ultimatum -- is built on the following assumptions. First, the book begins with the assumption that your well-being is optimized when you assess, monitor and evaluate your well-being both subjectively (self-rate) and objectively (engage in other-based evaluation processes). Second, it assumes that your inner and external capacities can both be enhanced in order to optimize the subjective and objective dimensions of your well-being. Third, it

challenges you to build these inner and external capacities by practicing the “three S’s”: committing to daily self-care, weekly social support, and monthly services as needed to handle the stresses that occur in your work and in your life. And fourth, it reminds you that these capacity-building, optimizing efforts are not only important for improving your quality of life and your longevity -- they will help to prevent the compassion fatigue and/or burnout that often plagues Super Heroes (Strategic Healers) like you.

It is my hope that you find this well-being ultimatum framework to be a valuable tool. It is designed to help you to strategically optimize both the complexities of your well-being (how it is difficult to define, measure and evaluate because it is largely self-interpreted); and the contradictions of your well-being (how your subjective and objective dimensions of your well-being won’t always get along). I really do not wish to confuse you!

By recognizing these complexities and contradictions up front, you will improve your ability to both make and manage your well-being ultimatum, because you will know what you are in for. You will realize that you’ve got to negotiate your way through these complexities, and contradictions in order to define, live and evaluate the life that is ideal for you. You will therefore be less likely to suffer the ill-being effects that result from the tidal shifts of well-being that can occur on a day-to-day or even hourly basis.

Instead, you can strategically address these shifts, and even make them work to your advantage. And, you will ultimately see that is the nature of these shifting well-being needs -- these complexities and

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contradictions -- that are the root cause of your Super Hero syndrome in the first place. Your desire to heal, lead and/or serve others (subjective well-being) and the feel-good-feeling you get when you do so (subjective well-being) must be balanced with your human needs. Through self-care, social support, and services you can simultaneously optimize your ability to handle stress, help others, and prevent the quiet plagues of compassion fatigue and/or burnout. These “3 S’s” will enable you to truly live well, and to sustain your well-being ultimatum.

With this understanding of the importance of examining your well-being from both subjective and objective perspectives, in order to see and optimize your whole well-being story, the discussion next turns to the major players of that story – your dimensions (types) of well-being.

# CHAPTER 4

## KOSHA-BASED WELL-BEING COACHING: HOW TO GET YOUR (PHYSICAL, MENTAL, EMOTIONAL, SOCIAL, & PURPOSE) WELL-BEING DIMENSIONS TO ALL GET ALONG

You have probably heard a friend say at one point or another “I have a theory...”. You may have even posited one or two yourself. I used to have a “theory” when my children were very young that were only loud when I got onto the telephone. This is not a widely-known theory, but it was “my theory” nonetheless. When I talked to other moms, they would often agree that this was a justified theory -- they found it true for their lived experience as well. A scientist may not consider this a “legitimate” theory but it was true for me and my lived experience nonetheless.

There are a variety of theories and models that seek to explain dimensions of our life – some of which are more accepted than others, and some of which have been tested more than others. Anyone can come up with a theory. However, as far as science is concerned, only theories that have been legitimately tested in the



scientific process are true “theories”. As noted by Glanz (1997), a theory is:

“A set of interrelated concepts, definitions, and propositions that presents a systematic view of events or situations by specifying relations among variables in order to explain and predict events or situations.” (Glanz, 1997).

In my example earlier, I found my behavior of picking up the phone to be predictive of my children’s making of loud noise. These events (variables) may or may not have been related, but to me there was definitely a relationship there. While this “theory” may have been true for me, it would need further (reliability and validity) study in my own life and testing in the lives of other Moms to determine if this was really a “theory” or just a phenomenon.

Somewhere between something being a phenomenon -- a series of coincidental events that catches our attention -- and a theory is a model. There are several types of models. A model can be a budding theory; preliminary testing reveals that the ideas in a prospective theory are valid but further testing is needed in order to be sure this is the case. A model can also sometimes be a very specific and/or new lens on a pre-established theory; a way to apply a theory into a particular situation or circumstance. Sometimes (although not always) the terms model and framework are considered synonymous; in this discussion I will use these terms interchangeably.

Why am I discussing theories, models and frameworks here? Because, in this chapter, I offer you several models for the optimization of your well-being.

Let’s begin this discussion by examining traditional approaches

to health and wellness coaching. Although many people may consider health, wellness and well-being to all be essentially the same thing, they aren't necessarily. You might say that your health is your status - - whether you have disease or not; your wellness is how you are (or aren't) strategically managing this status -- engaging in behaviors that either prevent illness and/or manage it; and your well-being is your experience of the other two.

Most health and wellness coaches encourage their clients to consider their life more from these health outcome and/or wellness viewpoints, and not necessarily from a well-being perspective. This means that they usually focus on health and wellness behaviors and strategy, and either ignore or minimize the importance of one's lived experience (or well-being). This is not because they wish to ignore well-being; it is usually because they assume that the act of maintaining one's health and optimizing one's wellness will manifest (create) well-being. However, as we have seen throughout this book, there is a lot of tension between what is good for us (health and wellness behaviors) and our experience of the good life as we define it (our well-being).

The following diagram illustrates a typical wellness wheel, which is used in many health and wellness coaching programs as a way to assess, evaluate, and/or coach a client to achieve "balance" in their life and/or strategically optimize health and wellness outcomes.



Source: University of Utah, Center for Student Wellness (2015)

When using the above wellness wheel, most health or wellness coaches would ask you to look at each section of the pie chart, and to evaluate (self-rate) each area in terms of how you perceive you are doing well, or not well. They might even ask you to ‘color in’ each area relative to your self-rating; coloring in the parts that you deem successful and keeping blank the parts you feel overwhelmed or challenged by.

If your total wellness wheel is colored in a “lopsided” fashion (for example, your social piece is filled in because you feel good about your relationships but your financial piece is empty because you do not feel you have enough resources to function well) then the health or wellness coach would help you to shift your attention, priorities and behaviors in order to achieve balance within each piece, as well as across the (wellness) wheel of your life.



Source: Total Force Fitness framework, U.S. Department of Defense (2015)

A more complex version of this wellness wheel, is found in the

Total Force Fitness framework, developed by the U.S. Department of Defense and utilized in the military health system. This “wheel” is actually an octagon, and recognizes the importance of standard wellness components (physical, social, psychological) as well as often-missing components (such as behavioral, medical, and dental).

The Total Force Fitness (TFF) framework implies that the U.S. military’s ability to be “fit” (and able to respond to security needs as appropriate) is directly dependent upon each service members ability to be “fit” in each of these areas. For example, units cannot deploy all of their personnel if individual soldiers or airmen fail their medical or dental exams.

Both of these examples of wellness wheels (and there are many others out there in the world of health and fitness promotion) assume that the individual experiences the dimensions of their life separately, and that this experience is largely driven by behavior.

What you are about to see – my Kosha approach to well-being – challenges the assumptions laden in these other wellness wheel approaches in three key ways.

First, it assumes that our physical, financial, social, mental, spiritual, purpose and emotional experiences of our life are not bound to our individual health outcomes and/or our wellness behaviors, It assumes that we have these dimensions of well-being no matter how “sick” or “healthy” we may be; no matter how much we do or do not engage in “healthy” behaviors; and no matter how much we try to “cut up our life” into separate pieces.

Second, the Kosha model of well-being offered here assumes that all of the components of your well-being cannot be fragmented evenly and separately (as depicted in the pie chart and/or octagon structure). It allows the different aspects of your well-being (physical, financial, social, mental, purpose and emotional) to shrink and expand relative to our experiences in the world.

Third, this Kosha model of well-being recognizes that your comprehensive well-being is dependent as much on the optimization of each dimension (type) of well-being, as it is to the recognition that all of these dimensions are interrelated. Each layer does not function separately (as is implied in other traditional wellness models); instead, there is an ongoing ripple effect between all of the layers. Optimization occurs for your well-being when each type of well-being is optimized, and when all of these types of well-being are also interacting in ways that support your subjective and objective well-being.

Your well-being ultimatum strategic planning process will therefore not require you to “cut up your life” into the pieces of your health and the dimensions of your well-being. You will notice that the protocols used in the assessment will not ask you to build your entire plan around your health outcomes - as is the case in most health and wellness coaching -- but will instead ask you to build your plan around your inner and outer experience of your life as it is. As noted above, it will ask you to not ignore your health outcomes (I want you to continue your medications, your therapy, and anything else a clinician has recommended for you). But I will be asking you

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to disassociate from that somewhat narrow (medical) approach to understanding your health and vitality, and to expand your viewpoint to include other dimensions (layers of your well-being).

It is my hope that the Kosha model of well-being offered here for your well-being ultimatum will improve not just your well-being, but also your health and your wellness. Instead of trying to get you to manage your health strategically by improving your ‘wellness’ through behavioral shifts, and hoping that your well-being will improve as a result, I will take you through a reversed version of that process.

We will help you to analyze the dimensions of your well-being, which will in turn help you to see where you are realizing and losing power (where you are and aren’t living strategically). This process will help you to redirect your assumptions, your behaviors and/or your perceptions accordingly. Suffice it to say that by optimizing your well-being, I hope to help you to optimize your health and wellness -- and not the other way around.

The following Koshas “model of well-being” can be considered a model, a phenomenon, or a legitimized theory, depending on who you talk to.

On the one hand, well-being scholars would say that the Koshas are barely even a model of well-being, because no one to date has combined well-being science with the Koshas in the literature. On the other hand, my friends in yoga therapy, Ayurvedic science, and alternative medicine would tell you that the Koshas are a very legitimate theory, because they have helped thousands of people for

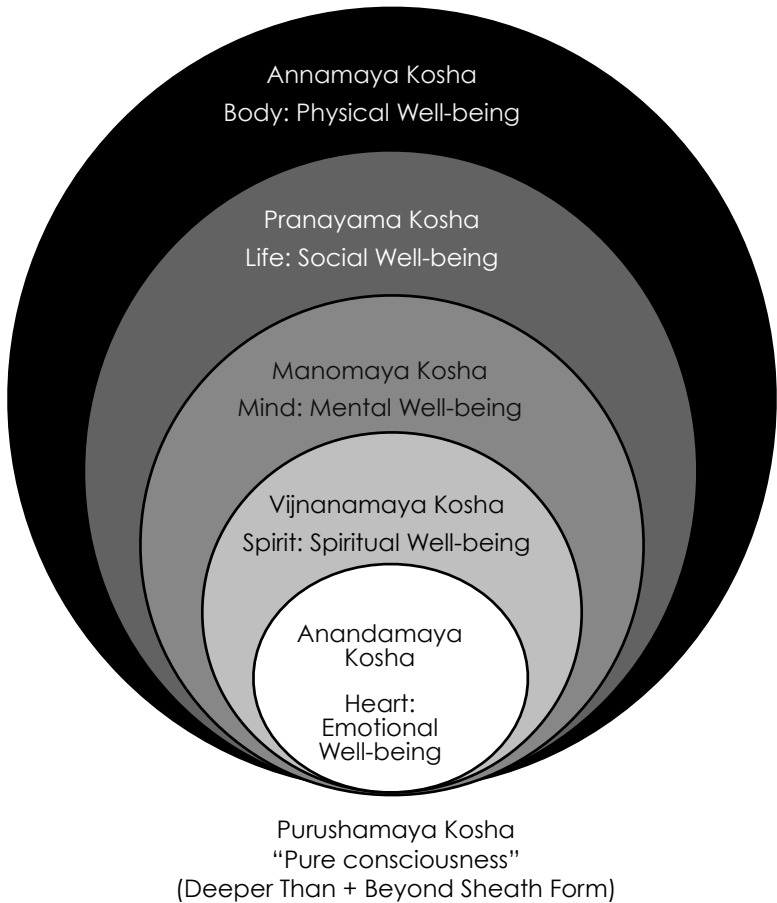
the past 5,000 years to understand their lives in ways that enhance their well-being (even if that was not what they were calling it at the time).

I respect both opinions, so I'm making a negotiated compromise between the part of me that is a well-being (social science) scholar, and the part of me that is a yoga therapist (healer). I will therefore refer to the Koshas as a model as an indicator of this compromise. To my knowledge, this idea of linking the science of well-being studies to the Koshas is new and is limited to my own work in the field with clients, teams and organizations, and in my own life. In fact, it was very surprising to me when I reviewed the literature (conducted a scope of current scholarship) and discovered that the widely-accepted and 5000-year old system of the Koshas has not yet been applied or linked to the science and/or promotion of well-being (at least not in the formal literature)

No matter what you may call them (a phenomenon, a model, a framework, a theory or something else), the Koshas serve as a powerful and easy-to-understand methodology (model) for appreciating the multiple dimensions (faces) of your well-being. In the last chapter, I explained that we need two viewpoints to truly optimize your well-being: the integration of both self-based (subjective) and other-based (objective) perceptions, evaluations, and monitoring is a fundamental requirement for your ability to have a 360 degree, holistic perspective on whether or not you are living well.



## A Kosha / Well-being Model



In this chapter, we will unpack the specific dimensions of your well-being, namely your physical (body), mental (mind), emotional (heart), social (life/relationships) and spiritual (sense of meaning and purpose/faith/hope). Each of these faces of well-being can and should be examined both subjectively and objectively; their collective whole (comprehensive well-being) can also be examined subjectively and objectively.

Conveniently, the Kosha model can help to summarize the dimensions (faces) of your well-being quite well. The term “Kosha” is the word that yoga philosophers and practitioners have used for many centuries to describe the “layers” around your soul. In fact, the word Kosha means “sheath” or “layer” in Sanskrit. Devout yoga masters will tell you that each layer (or Kosha) symbolizes a different layer (aspect) of your human experience.

The diagram of the Kosha/Well-being model illustrated in this chapter indicates how the koshas are conceptualized; they are a series of concentric circles similar to a target board or an onion. They have also been referred to having a similar expression as “Russian nesting dolls” – to indicate deeper and deeper layers of our lived experience. As you will see in the description of each layer (Kosha) to follow, the Koshas imply that beneath our “physical” experience of our life, we experience different layers (dimensions) related to our breath; mind; spirit; and emotions.

In the diagram, I also indicate how each of these Kosha layers is consistent with various dimensions, or faces of your well-being. This “matching game” is not a perfect one; partly because well-being science is complicated, and partly because much of well-being and Kosha science is influenced by their Eastern (Kosha) and Western (well-being science) origins and perspectives.

## **Annamaya Kosha**

Sanskrit Translation: “Food Sheath”

Well-Being Dimension: Physical Well-being; Financial Well-being  
“Body” Our lived experiences (doing) in the world

Well-Being Measures: Health Behavior and/or Medical  
Questionnaires (logs; screenings); Functional  
Health Assessment; Comprehensive Well-  
Being (WHO-5); Emotional Vitality;  
Financial Well-being

The translation from the Sanskrit term “Annamaya” is “food sheath” but this sheath refers to all of the needs and functions of your physical body (not just our ability to metabolize food). In my well-being approach to the Koshas, I consider this Annamaya kosha to be connected to your ability to function daily -- your ability to do what it is you have to do and what you want to do. Here I group both physical and financial well-being.

Please note that this layer is about infirmity, illness, or disability; it is about function, access and quality of life. For example, someone who is wheel-chair bound may have a high sense of physical well-being, if they are able to accomplish the daily tasks that they choose to do and those that they want to do. Their ‘disability’ does not have to mean an adverse effect on their function. Conversely, someone who has no “physical ailments” may have poor physical well-being if they are unable to function in their life in the way that they want to.

I place financial well-being in this layer, as a sub-component to physical well-being, because financial well-being influences the ways that we live and function in the physical world. Without financial resources, we can't buy food that is fuel; we can't ensure our personal security and welfare; we can't engage in activities that we need to accomplish and those that we want to accomplish; and we can't support the people that we care about. Our physical well-being (Annamaya kosha) depends on both physical, and financial functionality or well-being..

### **Pranayama Kosha**

Translation:	“Life force extension”
Well-Being Dimension:	Social Well-being “Life”
	Relating in our relationships, communities
Well-Being Measures:	Interpersonal Communication Competence; Social Support; Compassion Fatigue Questionnaire; Burnout Questionnaire

This sheath represents your overall “energy level” and your energy balance. In Sanskrit, the word “prana” refers to both your breath, and your overall “life force.” The word “yama” means restraint; but in the term “pranayama” the term “ayama” is used which means to “extend or to draw out”.

Just as you can breathe all day without thinking about it, or you can make very specific efforts to extend, focus, direct and/or guide your breath for very specific results-- our overall sense of “life force” (energy and vitality) can also be something we don't think about at all, or it can be something that we very specifically extend, focus,

direct and/or guide.

It is this Kosha that is especially susceptible to Compassion Fatigue and Burnout (discussed in chapter 2) because this is where your overall sense of “outflow and inflow” either achieve, or don’t achieve balance. It is also where the balance between your inner and external capacities is indicated.

Compassion Fatigue can be conceptualized as a condition in which the Super Hero’s outer sheath (Annamaya) becomes fragmented and/or withered; it therefore fails to protect this second, Pranayama sheath. The Super Hero’s sense of “life force” is drained because they are all outflow, with no protective and/or supportive and/or receptive inflow. People who give out of love, but don’t have the “boundary protection” of the outer-most protective (Annamaya) layer feel a ripple effect of imbalance that shows up in their Pranayama sheath. The Super Hero suffering from Compassion Fatigue may have a strong identify with their interior layers (of mind, heart, spirit) but the energy imbalance of their Pranayama layer and the fragmented Annamaya layers create a drain that is experienced both in their ‘life force’ reality and in their ‘functional life reality’.

From a Kosha perspective, Burnout is also a malfunction of these two layers, but is caused from an endurance (rather than imbalance) problem. The Super Hero hits an endurance wall because they are trying to “muscle through” their difficulties from a largely physical and/or financial perspective. They are trying to Make. Things. Happen. And are not allowing the flow of their deeper interior worlds (mind, spirit, and heart) to support their efforts. This

is why they end of feeling detached, and may say statements like “my heart’s just not in it anymore” – their physical, financial, and social realities (well-beings) are not in congruence with their mental, spiritual, and emotional ones. If Compassion Fatigue is an over-identification with one’s interior layers with a failure to recognize that receiving energy is importance to balance outflow; Burnout is an overidentification with one’s exterior layers with a failure to connect with what is true in their heart, spirit and/or mind.

Not surprisingly, I have placed social well-being in this second layer, because the ways that we function in our social relationships is directly correlated with our energy level. If we allow others to “walk all over us”, we have too much in-flow and we have no power in our relationships. Conversely, if we have all outflow and we walk all over others, we can become over-bearing, narcissist, and definitely ineffectual as healers/serviceworkers/leaders.

Finding balance in this layer is all about finding congruence between our inner and outer realities. Recognize the balance needed between your outflow to the world (your call to heal, serve and lead others) and your inflow (the personal, healing benefits you receive from acts of self-care, social support and/or service). By maintaining a cross-flow between these inner-outer and outer-inner relationships, you will be more likely to bolster your overall “life force”.

One way that I personally find balance now in this layer – that was not always the case – is that I try to find time alone before I present information as a teacher or work with individuals as a healer. Just as I knew when I was a performer, I needed to spend time alone

reviewing my lines and putting on my stage makeup before I went onstage, I know that I need to take time to be with myself before I go into these very outward endeavors. Sometimes I meditate, sometimes I go for a walk, sometimes I practice yoga; these are all examples of self-care that gives me a sense of inflow that prepares me for all of the outflow I am about to take on. I also combine these self-care practices with other “services”; I have a funny superstition that I cannot deliver a good workshop if my nails are not done. I know this is a somewhat conceited worldview, but it works for me. I enjoy allowing the service provider (the nail technician) share her gift with me, before I go share my gifts with others.

### **Manomaya Kosha**

Translation: “Mind Sheath”

Well-Being Dimension: Mental Well-being

“Mind” Perceptions of life, relationships, and world

Well-Being Measures: Life Satisfaction; Qual. of Life; Mindfulness

The term “Manomaya” is translated to “mind sheath”, even though it is referring to both what we perceive and evaluate in our life (thoughts/mind) and how we experience those perceptions (through our senses). In this Kosha model of well-being, I refer to this as the layer of our mental well-being. It is directly related both to our mental health, and the interactive effect of the feeling (happiness) and thinking (life satisfaction) dimensions of our overall quality of life.

This layer helps to explain that our feelings become thoughts; and our thoughts become feelings; in fact, it is often hard to tell

which comes first. It also helps to explain why our feelings and thoughts are not only felt in our mind and our ‘hearts’, but also how these influence our social well-being (Pranayama layer), our physical well-being and our financial well-being (Anandamaya layer).

In this Kosha model of well-being, we buy into the idea that our thoughts and feelings have ripple effects into our relationships and into our bodies. It helps to explain the psychosomatic experiences of our lives – both in pain and in joy. It is also a fundamental assumption that yoga therapists like me make when we are working with people in movement; the experience of asking our client to move and to breathe is not just about optimizing these layers, it is about trying to get underneath these layers to the heart of the heart/mind.

Just like the five senses can only function if we are engaged in the real world (we can’t smell, hear, taste, or see something if we are not aware of our external surroundings), this layer is not optimized unless we are tuned in. I can experience the air around me all day long; it is only when I tune into my sensory perception of my skin’s sense of touch that I truly appreciate the experience of the air on my skin. The Manomaya layer therefore asks us to check in with our deeper mental and experiential perceptions of our world; to be mindful of our thoughts and to find balance between the truth we see in the world, and the truth we are connected to in the deeper layers within.



### **Vijnanamaya Kosha**

Translation:	“Knowledge Sheath” or “Wisdom Sheath”
Well-Being Dimension:	Purpose Well-being
“Spirit”	Purpose: Call to serve, heal, and/or lead;
Well-Being Measures:	Meaning and Purpose Questionnaire; Engagement

From a traditional Kosha perspective, this layer refers to our spirit. I have found in my work with clients that this term – spirit – is loaded with meanings. Spirit can refer to the “esprit de corps” of our team. It can refer to the Holy Spirit as a mystical expression of God’s power. It can refer to our sense of mood – our ‘spirits’ can be referred to as high or low to indicate how our day is going. And Spirit can of course refer to Source itself.

Because the term Spirit is defined in many ways, I call this Kosha of Well-Being Purpose Well-being. (It refers to your having a deeper sense of meaning and purpose for your life, which may or not be related to your spiritual belief system). Notice I said a “deeper sense” -- this is in keeping with the Kosha model, in which this spiritual (purpose) layer is found deep, underneath our mind (Manomaya) sheath, which is under our life force (Pranayama) sheath, which is under our physical function (Anandamaya) sheath.

As a Super Hero, you have a very deep and direct connection to this layer. That is both your strength – your Super Power – and the source of your imbalance (if you do not balance this strong layer with

strength-laden efforts to the surrounding layers).

For those with strong spiritual and/or religious beliefs, this is also a layer in which our “call to service” that is beyond us, shows up for us. It is our connection to a higher voice -- of your higher, self-actualized Self (Maslow) and/or your Holy Spirit (Christianity). Although it is referred to as your “Higher” voice, it actually feels as though it is deep within us. We are the only ones who can “hear it”. It is held deep within us; behind our mental perceptions, our relationships, and day-day (functional lives).

Visionaries – including Super Heroes -- usually have a very strong Vijnanamaya Kosha. As medical intuitive Carolyn Myss has stated in several workshops, “My interior sense of reality is now more real to me than what I see in the world”. This Kosha helps to explain why visionary leaders are known for having strong “intuitions” about what is and isn’t right for their company. You might say that they are directly tapped into awareness of this deep, intuitive wisdom layer.

However, the best healers, leaders, service members, are not only tapped into this layer, they are willing to listen to what lessons it offers them AND they balance those perceptions with their outer layers. Visionaries who don’t take their great ideas out of this layer, and into the next layer out (thinking and feeling it through), and the next (getting it social support) and getting it to manifest physically and financially fall short of having their ideas succeed.

Ironically, visionaries and leaders don’t always possess the same traits. You might say that leaders live more in their Pranayama and

Anandamaya (outer) layers and visionaries live more in their Vijnanamaya and Manomaya (inner) layers. The best and most visionary leaders find the ability to get all of these layers to get along – to negotiate an outcome that all four can deem successful.

As noted previously throughout this book, I recommend that you Super Hero make the time for the “3 S’s” – self-care, social support, and services. This recommendation is made because engaging in these “3 S: behaviors will help you to strengthen each of the layers that surround this layer – where your call to service lives. Self-care will strengthen your Anandamaya layer; Social support will strengthen your Pranayama layer; and the use of services as needed for your ability to manage your life will strengthen your Manomaya layer. It’s a three-part approach to protecting your Super Hero call to service, that gives you strength to continue, and ensures that you have both “inflow” that these “3 S’s provide to balance the “outflow” of your drive to serve.

### **Anandamaya Kosha**

Translation: “Bliss Sheath” or “Joy Sheath”

Well-Being Dimension: Emotional Well-being

“Heart” Experience of joy, peace, bliss, happiness

Well-Being Measures: Happiness; Self-Regulation; Self-Talk

When my children were very young, they had a song they would sing in preschool: “I’ve got the Joy, Joy, Joy, down in my heart.” The Anandamaya Kosha is that joy.

As the innermost sheath, Anandamaya Kosha is your

“happiness” sheath -- your bliss sheath. It represents your limitless capacity for joy, love, peace and happiness. Just like all good stories have a “happy ending” this sheath reminds us all that underneath our lived experience in the world (physical layer), our interaction with the world (life force layer), our perceptions of the world (mental layer), our call to serve the world (spiritual layer), lies our joy in the world (emotional layer).

In my work with clients, this worldview – that ultimately we are just happiness -- has provided some of the most profound shifts of well-being I have seen. This is because many of my clients (especially Super Heroes) come to me believing if they would just “do, think, and/or be” differently then their happiness will return to them. They are coming to see them because they want me to give them the “prescription” of what they should do, think, and or be differently in order to get to happiness.

The Kosha model (and this adaptation of it for well-being science) flips those assumptions on their head. It says that we all have unlimited joy. Our challenges in our experience in the world occur when we forget this – when we get so caught up thinking, doing, and/or trying to be something that we aren’t. When any and/or all of our outer sheaths are out of balance, our joy is obstructed, or blocked.

While most of the time this idea – that joy really is deeply found inside of our hearts – is relieving, I do sometimes have clients who find this idea uncomfortable or even disturbing. Although not always, this is the case of an individual who has forgotten what joy

feels like or who has been so traumatized by a physical, life, social, mental or spiritual event that they are completely blocked in their outer sheaths.

In these cases, I don't try to convince them that the model works for everyone – because it doesn't. (No model works for everyone). I also don't fault them for their reaction; in fact, I encourage them to be skeptical and to be in whatever reaction they may have. But I do ask them to at least open up to the idea that hope can live for them—whether it is through this model or through another. I ask them to invite hope to visit them, much like an old friend they haven't seen for a while. It doesn't always end up with their accepting the Kosha model – and that isn't the point. But it does give them a sense of hope that there will be a day where they can welcome their well-being again – wherever they find it. And as the work of Seligman has found, hope is a key foundation of our well-being.

### **Purushamaya Kosha**

Translation: “Pure consciousness”

You may have noticed in this Kosha model of well-being, this sheath does not have a type of well-being attached to it, and it does not refer to a specific dimension of our life: (body, life, mind, heart, spirit). It doesn't get a “ring” on the diagram either. This is because it is indicative of our connection to a greater consciousness that is

beyond our ability to comprehend and/or give a name. It is beyond the limitations of a new circle, any of the other circles. It is beyond definition; it can't be bound by a circle on a chart no more than we can bind consciousness. It just Is.

It is therefore not surprising that many descriptions of the Koshas do not even recognize this as a sheath -- it is more of an assumption that when all of our Koshas are aligned, we will tap into this "pure consciousness". For those who are religious and/or spiritual, this layer can be considered God, Spirit, the Light, Source, and/or Brahman him/her/itself. However, for those who do not have these world/spirit/religious views, it can have a different meaning all together; that is entirely the point.

In totality, this Kosha model (approach) to well-being enables us to find one way to help explain the different dimensions of our well-being, and how these each of these dimensions influences its fellow dimensions. It helps to explain how your well-being can be experienced physically, socially, mentally, spiritually, and emotionally; and, it helps to explain how any life event is experienced in all of these multiple (well-being) ways.

You might imagine that each life event (stressor) sends a "shock wave" through all of your koshas; each layer experiences and/or adapts to the stressor in its own unique way, and flow between the koshas is as important as each individual kosha is itself. Sometimes a stressor (a surprise) gets "stuck" in a layer; we can't shake our physical exhaustion; or our ruminating thoughts. In these cases it is important that we seek (service and/or social support) help.

As noted by Dossey (1982), “Nothing happens in the Universe or in the physical world (including the physical body health) that does not have its correspondent on all planes of manifestation.” It is vital that we recognize that the sum total of all of the Koshas, as well as the interactive flow between them, is as important as each unique dimension. Much like the biopsychosocial health model (Engel and Romano, 1977) the sum is greater than the parts and all parts relate to and contribute to the sum of our well-being

So, the Kosha model approach to well-being science provides you with a powerful tool to acknowledge the interactive effect between the various components of your well-being. We can see through the Koshas that each unique dimension (layer) of your well-being has a story to tell, and all of these layers together tell an overarching story about your comprehensive well-being. As noted previously, we can evaluate each layer, as well as their composite whole (Gestalt) subjectively and objectively.

On a very practical level, the Koshas offer us a practical way to approach your well-being ultimatum. As you will see in the next chapter, we will create a well-being strategic action plan for each Kosha AND we will ensure that all of these layers (dimensions) of your well-being all get along on a daily, weekly and annual basis. To me, this is the secret to work/life balance, longevity and quality of life -- that it isn't so much a matter of each of us balancing our work, life and play behaviors, as it is an act of negotiation between the competing demands of the various layers of our well-being.

Using the Koshas as the key framework (model) for your well-

being ultimatum is in keeping with the ways that the Koshas have been helpful to yoga practitioners for many years. As noted by, Radiant Life Yoga (2015):

“The koshas comprise a practical and profound contemplative tool to help deepen our understanding of all aspects of ourselves...They help us to understand ourselves and others as multi-dimensional beings who need to come back into harmony with the soul in order to achieve health.” (Radiant Light Yoga Website, 2015)

To recap, the Kosha model of well-being recognizes how your functionality in this life (which includes both your physical and financial functionality); your life force (which is dependent upon your relationships and the balance between your in-flow and outflow); your perceptions (which is based on the mental experience of your thoughts, your feelings and your perceptions); your spirit (your sense of meaning and purpose) and your joy (your deep inner experience of blissful Truth) all influence our well-being. Each of these layers that surround your soul influences the other layers; together they also have a collective interactive well-being effect. An event for one layer (one dimension of our well-being), becomes an event for all. To dance, for example, is not just a physical experience. We may think of dancing as a physical act only, but it becomes an event for our life/breath, our heart/emotions, our mind/thoughts, and our spirit/deep sense of self, as well as an expression of joy.

In order for you to better understand the value that the Koshas can have as a framework for making your well-being ultimatum, I would like to now lead you through an exercise which will help you



to heighten your experience of them. You should know before we begin, that this (my) explanation of the Koshas. It is grounded both in the ways that they were introduced to me in the practice of yoga (philosophy and mind/body medicine), and to my own personal interpretations of how I experience them. This does not mean that this particular explanation matches with your own understandings of the Koshas, and it does not mean that you should limit yourself to this take on the Koshas either. It is simply one (my) perspective to help to introduce you to the Koshas and/or to review them and their relevance to your well-being.

### **A Voyage Through Your Koshas - A Mindfulness Practice**

[For an audio version of this exercise, please see my website, [www.dr.suziecarmack.com](http://www.dr.suziecarmack.com)]

Find a comfortable position in a safe place, and close your eyes. Notice your breath, and allow yourself to enjoy the gentle ebb and flow of your inhale and your exhale.

Now imagine that your Highest Self, or your Soul -- however you conceptualize it -- is standing in space. Think of this as the part of you that knows there's a you to know. You notice that there is space all around you. You are alone, but you do not feel lonely. You are peaceful. You are calm.

Surrounding your Soul is the experience and emanation of joy. Together your Soul and Joy circulate (dance!) until you feel a type of condensation. Like two gaseous substances that can become condensed into a liquid or a solid, your joy and your soul have

condensed into something else. But it isn't heavy; its a very real feeling of bliss, that is deep within you. Feel this joy deep inside your heart, your bones, your mind. This is your happiness layer, or your Anandamaya sheath / Kosha.

Stay in this layer for as long as you need to and/or want to. Notice how it is beyond thoughts or actions. It is a pure and intoxicating feeling that feels light and free, and flows easily around you, through you and from you.

Surrounding this experience of your next breath is your ability to discern how you get to this feeling of joy, and how you share it -- the Vijnanamaya Kosha. Your spiritual well-being lives here, because you know that your well-being is strengthened when you make a difference in the lives of others -- helping them, leading them, or serving them. Your unique abilities to heal, lead, and serve others are in this layer, and the feeling that you have been called to take on these actions lives here too. Much like Superman must "break through" his clothing to get deep into his Super Hero role, the part of you that really is a Super Hero lives here, deep within you.

Here, there is a quiet yet strong sense of knowing what is and what is not right for you. Here, you really know yourself and you have the ability to truly perceive others -- without judgment. Super Heroes don't judge the people that they save; but they do see the many parts of the world that need saving. You can see here -- very clearly.

Your sense of meaning and purpose is here too, as well as your

sense of engagement; you experience “power” when your inner joy (Anandamaya kosha - where we just were); your ability to discern and know what is right for you (Vijnanamaya kosha - where we are now) and your perceptions of your life choices (Manyomaya kosha - the next layer out that you can see from here) are all in synchronicity with each other. As you breathe into this layer, notice the peace that comes from trusting your intuition and what you see beyond what the world sees.

Surrounding this experience is the next layer - Manyomaya Kohsa, or mind sheath. Here you have the ability to examine your lived experiences in your relationships, your community, and the role/s you play in the world. Your inner knowing and wisdom (Vijnanamaya kosha - where we just were) pushes into this layer in helping you get into the real world of your lived experience. The meanings you create surrounding what the world sees, and what you inwardly perceive occur here.

Here you feel a sense of calm and trust when your deeper layers (of bliss and knowledge) are in synchronicity with the meanings you are experiencing in your life choices and your relationships. You also feel out of work/life balance, out of sync, and/or out of touch when these inner and outer realities are not aligned well, or at least when they do not seem to be getting along.

Here you know whether you are satisfied, or not with your life, and if your life has an overall sense of quality (or not). You realize that this sense of life quality and life satisfaction isn't so much about the particular choices you are or are not making, but is about the

congruence you have between your heart (Anandamaya kosha), your spirit (Vijnanamaya kosha), and your mind (Manomaya kosha).

Take a moment to breathe in this deep perception of your life - in your heart, your spirit and your mind. Notice how all of three of these layers are referred to as “deep koshas” but they are all somewhat “aerial views” of your life. They each ask you to perceive your lived experience in ways that are above (behind) our normal, everyday actions and consciousness – to get to the deeper meanings of our lives. Here, we have a deep appreciation for being alive, for the people who are in our lives, and a deep sense of knowing what is and isn't right for us. Our “core” values live here - beneath what the world can see.

Next, much like a seed suddenly takes shape and breaks through the earth to show itself as an evolving flower, the seeds of your core perceptions start to permeate into your relationships and your life. Here you bring your deep, internal experience of your well-being out into the open.

Here, in this Pranayama layer of well-being, we experience the transition from your inner world (of heart, spirit, and mind) into the interactions that you have in your life (outer world). With each breath you take, you trade between the inner world and outer worlds. In this layer, you do your best to keep the exchange between these worlds as even, as fully expressed, and as energizing as a very deep breath.

This Pranayama kosha invites you to see how you are influencing the world, and how that is kept in balance by how you

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are, or aren't allowing the world to influence you. If you feel that you are out of balance here, play with your breath-- a symbol of your prana or life force. If you need energy from the world, breathe a sense of vitality in with a deep and long inhale. To heighten the effect, breathe in longer than your exhale for several cycles, until you are no longer comfortable doing so. Conversely, if you need to release unused, stale and/or angry energy from your inner world, breathe out longer than you breathe in with a sense of clearing release. Remember your exhales are there to calm you, and your inhales are there to restore you.

It is here, in this layer, that we can understand not only the effects of our breath on our physiological systems, we can understand how our inner and external capacities must be kept in balance. We realize that our well-being is dependent upon inner congruence -- between our heart, spirit and mind -- and on keeping these deeper aspects of our well-being congruent with our (outer layer) experiences of and interactions with the world. This experience of the world happens with every breath we take, and in every choice that we make.

Pause here to perceive your overall sense of flow -- how your inner capacity (of heart, spirit and mind) is or is not in balance with your external experience of the world. Are you expending more energy in restoring the world (i.e. being a Super Hero) without restoring yourself within? Or are you trying to balance your external drive to help, heal, lead and/or inspire others with your internal needs to restore your heart, spirit and mind? These questions will

help you to discover whether your sense of (work/life) balance is compromised, and may help to explain your experience of compassion fatigue and/or burnout (if you find that you have it).

If you find yourself out of balance in this sheath, allow yourself to welcome a downward, receiving, even absorbing energy. Much like a plant needs fertilizer, water, and love to survive and thrive, you do too. Like sunshine warms our skin, allow the warmth of the feelings of love and compassion to be absorbed through your skin and bones (symbols of your outer physical Annamaya layer) and into your deeper layers. Allow it to restore your breath, your mind, your sense of deeper purpose, and your joy.

Surrounding this experience of your energy balance and overall vitality (pranayama kosha), is your physical experience of the world. This is the plane in which others see you living this life -- your 'doing' of your lived experience. This Anandamaya kosha allows you to experience your time on this earth as a human -- your physiology lives here. You get to eat, to move, to digest, to sing, to dance, to sweat, to make love and many more physiological functions occur because of this sheath. Here you do your life.

You may notice that you feel physical well-being here if you are able to do the things that you want to do, and that your physical well-being may feel low if that is not the case. If this layer is compromised in any way, allow yourself to examine where this lack of peace is coming from. First, go within. Feel how your heart/joy, your spirit/sense of purpose, your mind/perception of your reality, and your life/relationships all influence your physical experience of well-

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being. Notice if any of these layers are “pulling” energy out of your physical well-being by taking too much of your physical energy and/or attention.

Now, notice how you can transform any and/or all of these layers to enhance your physical well-being. For example, notice how your breath can help you to feel better, even when experiencing physical discomfort. Notice how your decision to let go of anger with your colleague (life layer) makes you feel physically relieved. Notice how your satisfaction with your life and the quality of life is based in large part on your perceptions of what should and should not be occurring to you; and how you have the ability to change these perceptions (and manage stress) simply by changing these perceptions.

Notice how your call to heal, lead and/or serve others asks a lot of your physical well-being. Give yourself permission to be a human. Give yourself permission to be tired or energized or whatever physical experience you are having. Enjoy your human physiology – and the many different physical experiences it gives us.

Notice how your heart layer influences your physical well-being -- when you are happy deep within, you feel physically lighter. Allow yourself to free any fears, worries, doubts, angers, sadness from your heart -- which are all not found in the present moment -- as a way to free your physical experience of well-being. Notice how letting go of your negative feelings in any layer give you a new sense of peace, strength and vitality that you can really feel physically.

Finally, take a moment to allow your experience to evolve past these six layers and koshas, and to notice the flow between them and around them.

Allow yourself time to notice any blocks within each layer or between the layers. Allow something greater than you (consciousness) to free these blocks or at least hold them for you in an act of Grace. Notice how you feel charged internally and externally. Notice anything else that you feel.

This is yoga -- when body, mind, heart, life and spirit are experienced as one. Internally, you experience equanimity -- you feel peaceful, vital, and happy. This is enlightenment. Externally you know you have the ability and willingness to decide what is best for all of these dimensions of you, without reservation or hesitation. This is empowerment.

The space where your empowerment and enlightenment meet is equanimity. Here, your koshas (your body, mind, heart, life and spirit) are all in alignment internally and externally. In this rare space, you are one with yourself, with others, and the world. Your well-being is optimized here.

Take a deep breath, and open your eyes.

Although it is beautiful when these moments of equanimity are experienced, our life is usually a lot more complex. Usually, a life situation (stress) brings forth a more complicated array of reactions from our body, life, heart, mind and/or spirit, sending a ripple effect



through our koshas (dimensions of well-being). Not only is each Kosha effected, there can often be a competing sense of reactions from each kosha.

When the needs of each Kosha is in conflict – this can be conceptualized as a kosha misalignment. This misalignment causes a well-being drain. When your ability to homeostatically balance your physical, mental, emotional, social and spiritual needs is compromised, your enlightenment and/or empowerment are compromised, and you find yourself out of work/life balance. In this misalignment, equanimity disappears, and well-being is compromised (diminishes).

When you make your well-being ultimatum, you are therefore encouraged to remember the needs of each of your Koshas (well-being dimensions) and to ensure that they all “get along” (negotiate) with each other. As noted in chapter 1, your Superhero call to service (purpose well-being kosha) can often times be at direct odds with your physical well-being kosha. You may forgo sleep, adequate nutrition, self-care practices and/or social support (dimensions of your physical and social well-being koshas) in order to meet the demands of your purpose well-being. This lack of balance not only threatens your equanimity, it causes an energy drain that results in either compassion fatigue and/or burnout.

You can hopefully now see why I advocate for you to take on the “three S” framework for your well-being ultimatum, namely: your needs for self-care, social support and services. Your self-care practices will ensure that you are optimizing your maintenance (daily

well-being needs; your social support practices will ensure that you are balancing your inner (heart, spirit, mind) well-being needs with your outer (social, physical) well-being needs; and your services practices will ensure that you are monitoring, evaluating and addressing any deficiencies in any and/or all of your Koshas on a monthly basis. The 3 S's are your Kosha management system; they will help you to prevent and/or manage blocks to your physical, financial, social, mental, purpose, and/or emotional well-being, so that you can experience enlightenment, empowerment, and equanimity and therefore optimize your well-being.

# CHAPTER 5

## WELL-BEING ULTIMATUM: HOW TO STRATEGICALLY DESIGN A WELL-BEING PLAN AND CONTRACT THAT YOU CAN LIVE WELL WITH

If you have opened this book, and turned immediately to this chapter, I don't blame you. You know based on the title of the chapter, that this is "game day" – where we put your well-being ultimatum plan together through a strategic planning process.

That said, I encourage you to become familiar with the four previous chapters first. I know you are busy, and you have a lot to do; you are a Super Hero after all. But, I assure you that your time in the proceeding chapters will be worth it. They will help you to understand who this well-being ultimatum is especially designed for (chapter 1); what benefits the well-being ultimatum planning and implementation process offers (chapter 2); what perspectives you should keep in mind when designing and evaluating your well-being (chapter 3); and how to better understand the ways that your dimensions of well-being live both in this planning process and in your life (chapter 4).

If I'm wrong, and you have already gone through these chapters, congratulations. It's time to get started.

## **WBU PLANNING PROCESS - BACKGROUND**

If you are familiar with strategic planning processes, you know that they can be very complicated, or they can be surprisingly simple. They can be conducted very quickly, or they can take years to complete. They can be a very useful exercise, or they can be a complete waste of time.

The strategic planning process you are about to see was designed to be as simple, efficient, and useful as possible. But whether or not the planning processes delivers on those intents will be mostly up to you. As the saying goes, what you put into it (the planning process) will be what you get out of it. And a plan is only as useful, and as practical, as it is utilized.

You are encouraged to take as long as you need to complete the following process; however, I encourage you to not rush it and to not take too long. If you rush through the process, you might miss an important opportunity. If you take too long, your enthusiasm will wear thin and you may become disengaged with (quit) the process altogether.

So what is an appropriate pace – somewhere between going too fast or too slow? I recommend that your process take about a month. In the first week you can create your vision and mission statements, the second week you can assess your subjective well-being, the third week you can conduct your objective well-being interviews and the fourth week you can create your evaluation matrix, as well as your contract. If you follow this plan, you'll be able to keep up with your other work/life demands and you'll have a comprehensive well-being plan in place just one month from now.

Keep in mind though there are two factors that have the potential to make your planning efforts more or less effective, and may even make or break them.

The first important factor to remember, is that this entire process will go more smoothly if you engage in it with a trusted friend or coach. Having this support – from a certified YogaMedCo Well-Being Coach<sup>1</sup> or your

buddy -- will ensure that you have accountability in the process, and will help you to feel that you are not going it alone. It will also be a lot more fun.

The second factor that you should address in this process, is that while the planning process will take about a month to complete, your well-being ultimatum will ideally last for a lifetime. I know this is a strong, and bold clam; however, that is the essential point of this entire process. As noted in chapter 2, your well-being ultimatum process is much like a recovery program. It will take you about a month to understand what is expected of you, and to decide what it will mean for you and your life as you go forward. From there, your well-being ultimatum plan will live and breathe as long as you make a daily comment to your contract.

### **WHAT MAKES A GOOD, EVEN GREAT WELL-BEING PLAN?**

No plan works if we ignore it, or if it was created on a false sense of pretenses with regards to “where we are” and/or “where we want to be”. Plans also don’t work if we fail to recognize our current capacities and/or resources: truths gleaned from a comprehensive analysis are key. Good plans work when both “where we want to be” (vision and mission statements) as well as “where we are” (SWOT analysis) are clearly identified. Good plans require honesty for us to really know both of these important elements, and that we make a long-term commitment for bridging the gap.

Truly great plans – which is what I hope this well-being ultimatum is for you – combine the same sense of honesty, and long-term commitment

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*’ If you are interested in training to become a well-being coach certified in my Well-Being Ultimatum system, please see [www.dr.suziecarmack.com](http://www.dr.suziecarmack.com) for details on how you can become certified as a coach in my YogaMedcCo Training programs. We would be very happy for you to join us!*

found in good plans (noted above), with an embedded monitoring and evaluation system. These plans ensure that we truly navigate between where we are now, and where we want to be AND that we track our progress over time. These great plans also respond to changing conditions and/or situational factors that can be ‘game changers’ for our plan; great plans are not stuck in the same set of assumption. A great plan lives and breathes.

## **WBU PLANNING PROCESS – STEP 1 VISION STATEMENT**

Many strategic planning processes start with asking you to assess where you are. Rest assure we will get to that. This process however starts with focusing on where you want to be – your “vision of success”. Think of this as your North Star which will guide the rest of this (planning) way.

Your creation of your “Vision of your Well-Being Ultimatum Success” comes out of answering any and/or all of the following questions:

- 1) What does well-being really mean to you?
- 2) If you had to write a theme for what your life would ideally be, what would it be?
- 3) Ask 5 people who know you well to say the first three words that they would use to describe you. See if there is a common theme amongst these answers AND see if you like what you hear. The part of you that resists their responses may be your higher voice trying to challenge you to see yourself in bigger and/or better ways.

When I conducted this program with a group recently, the following vision statements emerged. They give you an idea of how short, and specific, a good vision should sound be. You might wish to write a more formal statement than the ones below, but I liked that this particular group created vision statements that sounded like (and in a few cases were) mottos:

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Example 1: “Live Long and Prosper”

Example 2 “Make a Difference”

Example 3 “Protect and Serve”

As you can see, we have borrowed from well-known mottos/slogans, and that’s OK for this purpose (as long as you don’t try to ‘borrow’ someone else’s intellectual property for your next advertising campaign). Having a succinct vision statement (whether or not it is a motto) will summarize what core values you deem important and will give you an overall North Star-type guidance in the steps that follow.

My own vision statement today is “Be the change I wish to see in the world”. This of course is borrowed from a well-known quote attributed to Gandhi. For me, my life today is all about helping people to optimize their lives, and I know that this vision depends completely on my own ability and willingness to take my own advice (hence, my writing of this book and my commitment to following its recommendations even as I write and edit).

A few years ago, my vision was “centering the world one person at a time” – which articulated my desire to reach many people in individual ways. Both of my mottos articulate the global health components of my work today; my updated motto indicates how I now “get” that I am of no use to anyone if I don’t take my own advice. First.

Interestingly, I found out recently that what I thought was Gandhi’s words (my vision statement) is actually a summary of a longer quote, which reads:

“If we could change ourselves, the tendencies in the world would also change. As a man changes his own nature, so does the attitude of the world change towards him. . . . We need not wait to see what others do.” - Gandhi

I actually like this interpretation better, because it further articulates my beliefs. It’s a little long for a vision statement, but it does summarize the

core values I hold dear – which have ramifications in all aspects of my life.

I share this quote here as a gentle reminder to you to be sure that your vision statements (as well as all other elements of your well-being ultimatum plan) are aligned with your “true nature”. I want you “not wait to see what others do” but to instead create a well-being ultimatum optimization plan that is uniquely yours.

When you have completed your well-being vision statement, place it on the Well-Being Planning worksheet on page 125.

## **WBU PLANNING PROCESS – STEP 2 MISSION STATEMENT**

In most strategic planning processes, the Mission statement brings the “big dream” of the Vision statement into the “real context” of the real world. According to Forbes Magazine (2015), a company’s mission statement should answer the following four questions:

- What do we do?
- How do we do it?
- Whom do we do it for?
- What value are we bringing?

Your Well-Being Ultimatum mission statement should especially clarify that fourth question – the value proposition of your well-being. What does having, achieving and sustaining do for you and for others? Moreover, what is most important to you with regards to your well-being?

My well-being mission statement is as follows:

Dr. Suzie Carmack is a strategic healer dedicated to promoting health, wellness and well-being. She strategically commits to her own self-care and well-being needs on a daily basis, enjoys time with her family and friends on a weekly basis, and believes in the importance of optimizing quality of life – both her own and her clients’, readers’ and students – on a ongoing (annual) basis.

As you can see, it’s a little clunky, but it works for me for now—and that’s



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what really matters. It reminds me, when I easily get distracted by projects and/or life events, where my priorities are. It helps me to clarify to myself how I bring my “vision” (for helping the world) into the reality of my life.

Take some time to think through what your mission statement might include. Feel free to talk with several important people in your life, and ask them to clarify for you what they think you find important.

When you have completed your well-being mission statement, place it on the Well-Being Ultimatum (WBU) planning worksheet on page 125.

### **WBU PLANNING PROCESS – STEP 3 SUBJECTIVE WELL-BEING SWOT ANALYSIS**

As noted previously, a SWOT analysis is a common component of most strategic planning processes. By clarifying your strengths, weaknesses, opportunities and threats, you can gain a valuable perspective on where you are now, compare that to your vision and mission statements (where you want to be). The real benefit of a SWOT analysis, is that it gives you efficient perspectives on just how difficult, long, or easy the strategic road between “here and there” will be.

In order to conduct your SWOT analysis, I encourage you to take the Well-Being Ultimatum pulse check (found on my website [www.dr.suziecarmack.com](http://www.dr.suziecarmack.com)). This tool is optional for this Well-Being Ultimatum strategic planning process, but it was designed to give you a new perspective on your layers (koshas) of well-being. Your choice to complete the pulse check will also enable my team and I to track potential trends with regards to population well-being in aggregate (while still protecting your information individually).

After you complete the pulse check, then answer the questions below. (If you choose not to complete the pulse check, just go directly to the questions below).

My unique well-being strengths are:  
My weaknesses, which I reframe to myself as vulnerabilities are:  
The opportunities I can see for my Well-being Success are:  
The threats to my Well-being that I must address are:

Place the answers to these questions on the WBU worksheet (page 125).

## **WBU PLANNING PROCESS – STEP 4**

### **OBJECTIVE WELL-BEING STAKEHOLDER ANALYSIS**

“Stakeholders” bring unique and necessary perspectives to any strategic planning process. A stakeholder is someone who has a “stake” in your success. For a company, stakeholders can be both internal (employees, leadership, board) and external (customers, prospective customers, the public). By gaining perspectives from both internal and external stakeholder viewpoints, a company can set a more realistic, and responsive strategic way forward (plan).

This Well-Being ultimatum process similarly asks you to conduct both internal and external stakeholder analysis – starting with this section. In this step, you will complete the external stakeholder analysis, but interviewing people in your life that represent your five key dimensions (Koshas) of well-being. Unlike the first three steps of this strategic planning process, in which you have relied completely on subjective (self-rated) perspectives, this step will offer you an objective view of your well-being. As noted in chapter three, both subjective and objective perspectives are key to ensuring a full, holistic, and 360 degree perspectives of your well-being.

As noted in chapter four, the Koshas represent your major dimensions (layers) of well-being. Here, in this step, I ask that you choose at least one person who represents what each of these layers mean for you in your life, or someone who you may see as a role model for that layer. For example, your doctor, your personal trainer, or even your financial planner, might

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represent your physical well-being layer. Place the name of each person in the space next to the appropriate layer below.

Physical Well-Being:  
Financial Well-Being:  
Social Well-Being  
Mental Well-Being:  
Purpose Well-Being:  
Emotional Well-Being:

Take time to have a conversation with each of these people (stakeholders) to understand what their perceptions are for your well-being. Ask them to discuss with you how they perceive your well-being currently, and what potential they see for your well-being in the future. Encourage them to be frank with you, so that you can really learn from their suggestions. At the same time, take what you hear in perspective; this is one of the reasons why you are encouraged to talk to at least five people.

After you have interviewed each of these key people, take time to reflect on these stakeholder conversations, and what they mean for you. Then, answer the following questions on page on your WBU planning worksheet on page 125.

The Koshas (types of well-being) that are strongest and most viable for me are:

The Koshas that are weak, diffused, drained and/or vulnerable are:

The opportunities I see to enhance any and/or all of my Koshas are:

The threats I see coming that may compromise my ability to achieve and sustain my Koshas / well-being are...

### **WBU PLANNING PROCESS – STEP 5 SUBJECTIVE WELL-BEING STAKEHOLDER ANALYSIS**

In the last step, we captured and processed your external stakeholders' perspectives. In this step we will conduct an internal stakeholder analysis.

This step will ask you to “suspend your disbelief” and imagine that you have a “committee of internal stakeholders” inside your psyche, and that these stakeholders are about to have a board meeting.

To engage in this process, simply imagine that each of the following Kosha layers is personified. You might imagine it is as a character, or as a role – you are the playwright of this creative exercise and you get to decide how you take this step on. Be sure to have fun with the process.

After you have given each of these Koshas / Well-being dimensions a name (role, or character), take time to become quiet and meditate /contemplate that these roles have a board meeting to discuss your well-being. Call the meeting to order by asking each of these board members (roles of your well-being) to clarify what it wants at this board / bargaining table. Your physical well-being layer might say it wants to eat better, to move more, to sit less, and to have a deeper sense of physical security by taking time this coming year to get your financial house in order. Your purposes well-being might say it wants to shift the day-day work you are doing because it no longer feels that you are working in ways that fulfill your unique mission/vision. Allow each role to have a moment to speak.

Like any good meeting, it is important that you allow each role to have a voice. Let no role go unheard. At the same time, notice if you have certain roles that are overpowering others. Ensure that by the end of the meeting that all of your roles can agree on a way forward – which will most likely take a bit of negotiation.

In my own life I conducted this exercise about a year ago. I won't go into all of the fictitious details, but I can tell you what the experience taught me. It made me realize that certain types of my well-being (certain Koshas) were trying to “run my well-being show”. Other roles were surprisingly silent at this meeting. It made me realize that I needed to allow all (not some) of my inner stakeholders (well-being roles) to have a voice, and I

needed them all to get along with each other.

Go now to the WBU planning worksheet and complete this internal stakeholder analysis that is there. Allow yourself to journal about what you find in this step, as well as all of the steps thus far.

### **STEP 6: ANNUAL (LONG-TERM) GOALS**

In this step, you put your vision and mission statements up against where your SWOT and stakeholder analyses. You then clarify how you wish to articulate your well-being goals for the next year.

In the WBU planning worksheet to follow you will describe what your ideal well-being dimensions will look like in a year. This allows you the freedom to envision the major shifts you want to make over the next year. I have found that many people have an idea of where they want to “take” their well-being, but they find it too daunting to imagine that they could get from here to there in a short / fixed amount of time. A lot can happen in a year. So, by setting your goal against a year timeline, you give yourself some space to make your strategic goals happen. (You can set more long-term goals, at 3- and/or 5-year benchmarks, but I prefer 1-year long-term goals).

This goal list will also serve helpful for your annual evaluation efforts. You can evaluate your success relative to where you have met your goals, where you haven’t, and how you have/haven’t tracked towards success.

### **STEP 7: MONTHLY GOALS**

One way to begin tackling your annual goals for each dimension of your well-being, found in Step 6, is to break up your steps to get there over seasonal (quarterly) and/or monthly goals. The WBU planning worksheet on page 125 asks you to take each quarter of the year to focus on your strengths, weaknesses, opportunities and threats.

Another approach to this section, not found on the worksheet, would be to set a goal for each month of the calendar year. For example, you might tackle reorganizing your financial well-being in January; committing

to a new fitness regimen in February; taking a course in an activity that is aligned with your purpose well-being in March, and so on.

It is important to track your monthly success over the course of each month. I like to check in with my monthly goals every 10 days.

### **STEP 8: WEEKLY GOALS**

Your weekly goals are where I believe the Kosha approach to well-being ultimatum comes in the most handy. You simply match each of the Koshas to a different day of the week, and make that your major priority for the day. For example, you might decide that your

Monday: Physical Well-Being is your priority

Tuesday: Financial Well-Being is your priority

Wednesday: Social Well-Being is your priority

Thursday: Mental Well-Being is your priority

Friday: Purpose Well-Being Mental is your priority

Saturday: Emotional Well-Being is your priority

Sunday: Religious and/or Comprehensive well-being is your priority

This approach does not imply that you will ignore other dimensions of your well-being on alternate days; but it does give you a focus for the day so that you can check in with that well-being dimension and ensure you are not overwhelmed by your long-term commitment to your well-being ultimatum.

### **STEP 9: DAILY ACTIONS**

As you will see on the WBU worksheet to follow, this section will recommend that you address the following self-care needs on a daily basis.

#### **WBU DAILY SELF-CARE CHECKLIST**

Feel free to add to, or adjust this list based on your preferences

Medication as per medical directives

Mobility (to not sit too much and to move your major joints)

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- Exercise (as is appropriate for your age and physical condition)
- Nutrition (eat well more than you don't, appropriate to your needs)
- Alcohol (< 1 drink per day (women) / 2 drinks per day (men))
- Sleep (no less than 6 hours per evening)
- Detox digitally (give yourself breaks from media and/or email)
- Mindfulness (practice gratitude and self-compassion)
- Non-work endeavors (find balance by engaging in non-work practice)

Talk through this list with your buddy and/or coach. Ask them to help you strategize how you will meet each of these objectives. Be honest with them, and yourself, about which areas seem easy for you, and which ones will be difficult. Strategize the ways you will get this list to fit into your day. For example, I practice a digital detox, and my exercise, at the same time.

### **STEP 10: THE CONTRACT**

Ask your well-being buddy, or your coach, to help you to finalize, and then sign your well-being ultimatum contract (found on the last page of this book). Place the contract in a frame, in an area where you can see it on a regular basis – to remind you to keep your well-being ultimatum with yourself. Let it be an ongoing reminder for your need to a daily commitment to self-care, a weekly commitment to social support, and an ongoing (annual) need for services that will help you to optimize your well-being. These efforts will ensure that you Super Hero aren't just living well; they will help to ensure you can do the Very Important Healing Work you are Called to do.

## WELL-BEING ULTIMATUM PLANNING WORKSHEET

To me, well-being means...

### STEP 1: VISION STATEMENT

My Vision Statement for my life, and my well-being is:

### STEP 2: MISSION STATEMENT

My Mission is to:

### STEP 3: SUBJECTIVE WELL-BEING SWOT ANALYSIS

According to my completion of the Well-Being Ultimatum surveys (found on [www.drсуzиеarmack.com](http://www.drсуzиеarmack.com)), I have discovered the following to be true:

My unique well-being strengths are:

My weaknesses, which I reframe to myself as vulnerabilities are:

The opportunities I can see for my Well-being Success are:

The threats to my WB that I will be sensitive to but not afraid of are:

### STEP 4: OBJECTIVE WELL-BEING SWOT ANALYSIS

The following 5 people represent each of my 5 Koshas / Layers (Dimensions) of Well-being:

- My Physical Well-Being Role Model / Representative
- My Financial Well-Being Role Model / Representative
- My Social Well-Being Role Model / Representative
- My Purpose Well-Being Role Model / Representative
- My Mental Well-Being Role Model / Representative
- My Emotional Well-Being Role Model / Representative
- My Comprehensive Well-Being Role Model / Representative

According to my completion of open interviews with each of these



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people, I have discovered the following SWOT analysis to be true:

The Koshas (types of well-being) that are strongest and most viable for me are:

The Koshas that are weak, diffused, drained and/or vulnerable are:

The opportunities I see to enhance any and/or all of my Koshas are:

The threats I see coming that may compromise my ability to achieve and sustain my Koshas / well-being are...

### **STEP 5: SUBJECTIVE WELL-BEING ANALYSIS**

After taking time (ideally a week or more) to get to know each of my layers of well-being, I realize that they each want the following:

- My Physical Well-Being wants...
- My Financial Well-Being wants...
- My Social Well-Being wants...
- My Purpose Well-Being wants...
- My Mental Well-Being wants...
- My Emotional Well-Being wants...
- My Comprehensive Well-Being wants...

When I consider how these wants match up with each other, as well as with my vision and mission statements, I find that... (journal here).

### **STEP 6: ANNUAL (LONG-TERM) GOALS**

After reviewing Parts 1 – 5 above, and further reflection, I declare the following as my Well-Being Ultimatum Goals for the next year:

- Physically, my well-being will be experienced as:
- Financially, my well-being will be experienced as:
- Socially, my well-being will be experienced as:
- Mentally, my well-being will be experienced as:
- Purposefully, my well-being will be experienced as:
- Emotionally, my well-being will be experienced as:

**STEP 7: MONTHLY GOALS**

In months 1 – 3, I will address the following threats to my well-being:

To do this, I will lean on the following services:

In months 4 – 6, I will work to develop opportunities for my well-being

To do this, I will lean on the following services:

In months, 7 – 9, I will celebrate my well-being strengths by:

To do this, I will lean on the following services:

In months, 10 – 12, I will have transformed my challenges by:

To do this, I will lean on the following services:

**STEP 8: WEEKLY PRACTICES**

I will take care of my well-being dimensions weekly by:

- Monday: Physical Well-Being
- Tuesday: Financial Well-Being
- Wednesday: Social Well-Being
- Thursday Purpose Well-Being
- Friday Mental Well-Being
- Saturday Emotional Well-Being
- Sunday Comprehensive Well-Being:

I will check in with my Well-Being Coach / Buddy \_\_\_\_\_

**STEP 9: DAILY PRACTICES:**

List your daily self-care practices here.

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### STEP 10: THE WELL-BEING ULTIMATUM CONTRACT

I \_\_\_\_\_, recognizing that a sound mind, body, heart, spirit and life are all of vital importance to me, my family, my friends, and those I heal in my work as a \_\_\_\_\_ make this Well-Being Ultimatum with myself.

\_\_\_ Today, I admit that my well-being is currently challenged by \_\_\_\_\_. Putting others first and/or the following patterns \_\_\_\_\_ are no longer working for me, my well-being, or my work as a healer.

\_\_\_ I recognize that I deserve to enjoy a good life, and to live in ways that are good for me. I welcome the longevity, prosperity, and overall quality of life that results when I balance my desire to heal others with my own personal needs for self-care, social support & services.

\_\_\_ I recognize that my health, my wellness, and my well-being can no longer afford to be ignored, dysfunctional or less than optimal. I seek to prevent, or combat, the effects of compassion fatigue, burnout, and other disorders that occur when my energy is drained.

\_\_\_ I agree to regularly check in with my buddy / coach to monitor and evaluate my progress.

#### SELF-CARE

On a Daily Basis, I will commit to the following Self-Care practices

- 1) I will take all medications as directed by my doctor.
- 2) I will limit my sitting behavior during the workday by: \_\_\_\_\_
- 3) I will move my body for at least 20 minutes day by: \_\_\_\_\_
- 4) I will aim to get between \_\_\_ and \_\_\_ hours of sleep (>6.5 hrs).
- 5) I will eat well more than I do not, as needed for my activity level
- 6) I will limit myself to no more than 1 drink per day (women) / 2 drinks per day (men), and will drink only when engaged with friends.
- 7) I will take at least 10 min. per day to practice mindfulness (which may or may not be combined with movement and/or stillness).
- 8) I will digitally detox daily by (e.g. limiting screen time after 9 pm; limiting check-ins on social media, etc).
- 9) I will spend time every day engaged in non-work activities such as: \_\_\_\_\_
- 10) I will commit to my weekly well-being goals on a daily basis as follows:
  - Monday: Physical Well-Being
  - Tuesday: Financial Well-Being
  - Wednesday: Social Well-Being
  - Thursday Purpose Well-Being
  - Friday Mental Well-Being
  - Saturday Emotional Well-Being
  - Sunday Comprehensive Well-Being

#### SOCIAL SUPPORT

In addition to making a point weekly to ensure that I spend quality, undistracted time with my family and friends, I will also take time throughout the week and the month to catch up with those who are near and dear to my heart.

#### SERVICES

I agree to allow myself to be vulnerable enough to admit and recognize when I need help from a variety of services, which may include but are not limited to: legal, financial, physical, medical, stress management, and/or any other key service area that will help to enhance, support and “back up” my well-being.

SIGNED: \_\_\_\_\_ Date \_\_\_\_\_

BUDDY or COACH: \_\_\_\_\_ Date:: \_\_\_\_\_

Thank you for reading *Well-Being Ultimatum*.

If you found the book helpful, I would be humbled and honored for you to share this book with your friends and colleagues.

We Super Heroes need to stick together.

I wish you peace, joy and love.

Suzie

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Please visit Dr. Carmack's website to learn more about her other books, coaching, speaking, coach training and research collaboration opportunities:  
[www.DrSuzieCarmack.com](http://www.DrSuzieCarmack.com).

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As a private integrative health and well-being coach she has personally coached over 1000 C-suite executives, clinicians, educators, and senior-ranking military officers in the art and science of moving and living well using the same "well-being ultimatum" framework found within this book.

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Suzie lives with her partner Bob and her daughter Sophia and is also the mother of two amazing young men: Chris, and Brandon.

Learn more about how you can collaborate with Suzie to bring more well-being to the world at [www.DrSuzieCarmack.com](http://www.DrSuzieCarmack.com).