Relational Worldview Model System (RWMs)

Introduction

Hello, I'll try to make this guide as short as possible, while still providing the maximum benefit by sharing the tips I've accumulated about how I use the Relational Worldview Model[1] and Evernote to optimize my daily routine. However, it's going to be a bit long, so I recommend using a screen reader if you can.[2] It might seem long, but there are a lot of pictures. I'll try to make it easier by emphasizing important points.

This system is an art, not a science, but it has helped me find balance before, during and after gradschool, during which time I had a lot of competing priorities. When I put the 's' after RWM it signifies my understanding of the RWM, not necessarily what the training from NICWA prescribes. This system is a fusion of theory and practice and I hope it's useful to avoid crisis, find balance and be well.

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Chapter 1: Rationale

Individual balance is fundamental to a healthy lifestyle. If you're unfamiliar with the Relational Worldview Model, I'll encourage you at this point to research it before you begin. Essentially, the RWM is a lens through which one can find balance by considering 4 quadrants, the mind, body, spirit and context. There are other models that have similar characteristics, such as replacing the context quadrant with emotions or adding more facets, however, for me 4 quadrants of mind, body, spirit, and context encapsulates everything I can imagine. Therefor, I use the RWM because it's comprehensive and I don't have to ever consider externalities that don't fit.

If you've ever played the game Mexican Train, there are comparisons I can make to the RWMs. Mexican Train match numbers on dominos to each other, thus building a

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[1] http://www.nicwa.org/

[2] If you're on a Mac, the accessibility tools have this option. Otherwise, there are options like VoiceDream or a Google search could turn up something else.

train and the first one to play all their dominos wins. The object of the game is match numbers, which in the RWMs is analogous to making an association between two or more topics. This association can be on a continuum from strong to weak, with the <{([Relational WorldView Model])}> note being the trunk of the tree and the strongest association that holds everything else together. Part of the system is taking notes on things that come up throughout the day, which would be similar to the domino pieces. These notes can be anything, like a movie to watch, a recipe to make, an email address or chore to get to later. All of these items have some degree of importance, but not all of them are urgent, so the point of the RWMs is to line them up much like one would line up dominos in Mexican Train.

The RWMs leverages the Eisenhower Matrix for prioritization.[3] Where there are 4 quadrants where items are either important/not important/urgent/not urgent. The RWMs uses Evernote to categorize notes into one of these 4 categories, so things that are urgent and important can be done immediately without forgetting about the things that are important but not urgent. The process conserves energy resources for when and where they're needed most by providing a holistic perspective during decision making. Ultimately, using the system leads to greater freedom through discipline.

Chapter 2: Components

Enough with the sales pitch, lets get started by introducing you to the components of the RWMs. There are three types notes, New Notes, Leaf Notes and a Trunk Note.

New Notes

New notes are what arrives in the –Inbox notebook and are just text or whatever raw data you're trying to integrate. Here is an example of a new note:
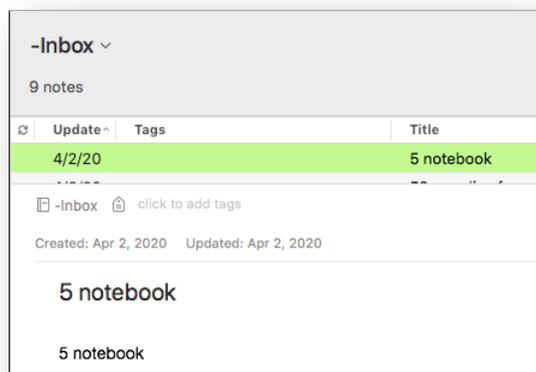

As you can see, there is nothing spectacular about this note. It simple text that I can cut and paste into Leaf Notes. This note in particular is my personal reminder that I

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[3] https://www.eisenhower.me/eisenhower-matrix/

spent 5 dollars on a notebook on April 2, so I can follow up if there are any discrepancies with my bank.

Leaf Notes

The most granular element of the RWMs is the leaf note. Usually, when I write 'note,' this is the type of note I mean. It's comprised of 4 areas: Word Cloud, Activities, Todos, Notes. They're separated by horizontal lines and the Todo section has a checkbox in the bullet points. A basic note looks like this:
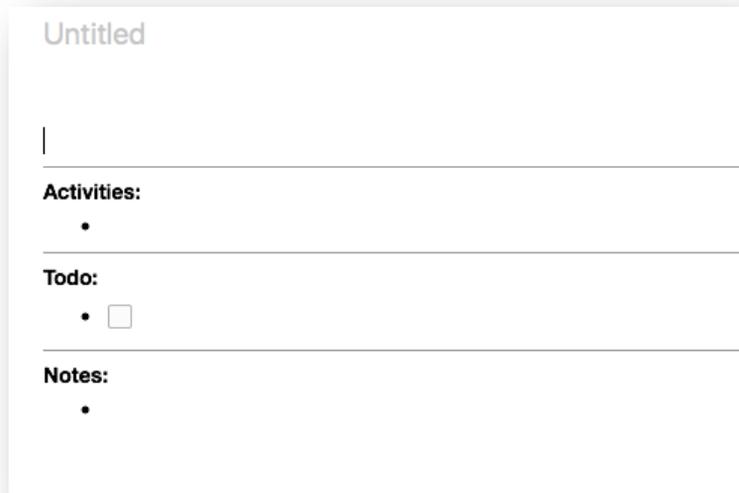
I created this note and saved it as a template in Evernote, which makes it easier to create new notes in the future. Names for notes can be anything. The name will eventually be the text in the link used later, so make sure it's something that makes sense to you.

From this template you can fill in the sections, for example:

Within leaf notes, I use the highlight feature on text that is important. This makes it easier to identify why a note is important later when Raking Notes.

Word Cloud:
At the top of the leaf note is a word cloud of note links that act as a way to navigate between notes with strong association.

Activities:
The activities section is where you can describe weak associations in a sentence using links. The difference between Activities and Todo's is that Activities can never by accomplished, but Todos can.

Todos:
The Todos section is where you can write items to do that relate to that specific note. For instance, on my 'Today's Checklist" note I might have 'laundry' as a todo. The actual note is what gets prioritized using the Eisenhower matrix, so put as many todos here as you want, because if the note is not important than it's not going to be the first thing that pops up and you won't feel obligated to do the task.

This is a great place to put present ideas that you want to buy for people, because we only get a couple chances throughout the year and great present ideas don't usually come up when you need them to, but if you write them down on in the todo section of a 'Present Budget' note, then around Christmas or a birthday, you won't have to look far.

Do be aware that if there are too many Todos, it might signify that the note is a parent note that could be broken down further into more child notes.

You can also prioritize todos within a note by indenting them on other todos that must be accomplished first.

Notes:

The notes section is a catch all for the rest of the note. Evernote is great with everything from Pdf documents to links, to lists to images. I have a note full of my favorite quotes where the note section is full of quotes. Sometimes after a todo has been completed I'll duplicate it in the note section or vice-versa.

Trunk Note

The Trunk Note I mentioned earlier that I named <{([Relational WorldView Model])}> is the glue that holds RWMs together. All notes in the word cloud should have a link back to the Trunk Note, either through other notes or directly, depending on the level of association.

When getting started it's Ok to put brackets around the name of the note to symbolize which of the 4 quadrants the note falls into. For me, the mapping is <Mind> {Body} (Spirit) [Context]. Since the <{([Relational WorldView Model])}> note encapsulates all these quadrants, I've surrounded the name with all 4 types of brackets. Keeping this updated gets tedious after a while, however, and I have plenty of notes without brackets. In the beginning, the brackets help to see which areas are lacking when linking into the <{([Relational WorldView Model])}> note. As a general rule of thumb, I like to keep any note that is linked directly to the <{([Relational WorldView Model])}> note, to have some combination of brackets.

There shouldn't be a Todo section on the <{([Relational WorldView Model])}> note, as any Todo's should be in the more granular leaf notes.

Here is an example of what your base note might look like:

<{([Relational Worldview Model])}> copy

<Mind>

<Mental Health> | <{([Schedules])}> | <({[Finances]})> | <({[Goals]})> | <{([Research])}> | Thinking

{Body}

{Physical Health} | {(Optimal Health)} | <{([Schedules])}> | <({[Finances]})> | <({[Goals]})> | <{([Research])}>

(Spirit)

(Spiritual Wellness) | <{([Daily Habits])}> | <([Professional Development])> | <([Relationships])> | <([Characteristics])> | <((Running)}> | <{([Sustenance])}> | {(Optimal Health)}

[Context]

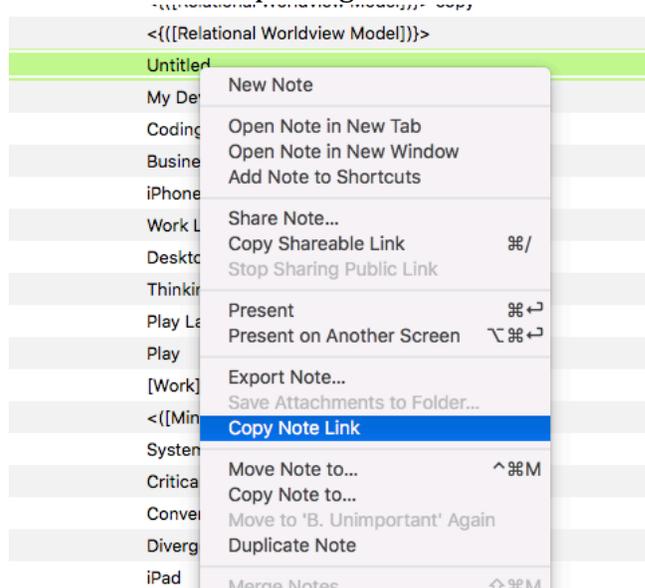<{([Financial Planning])}> | <{([Schedules])}> | [Finances] | [Chores / Errands] | <{([Daily Habits])}> | <([Professional Development])> | <[Vehicle Maintenance]> | <([Education])> | [Work] | Money | My Devices

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Activities:

- Periodically check in with yourself to fine balance and Pursue areas that provide strength
  - http://www.nicwa.org/Relational_Worldview/
- Energy management- Manage your energy not your time
  - Physical energy-restored by food, exercise and sleep;
  - mental energy- restored by clarity, few distractions and focused attention on the task at hand;
  - emotional energy-restored by feeling valued and positive experiences;
  - spiritual energy-restored by revisiting your sense of purpose and living your core values

Links:

The green text are links to notes. You can get a copy of a note's link by right clicking the note and then pasting it in another note, for example:

<{([Relational Worldview Model])}>

|	
Untitled	New Note
My De	
Coding	Open Note in New Tab
Busine	Open Note in New Window
iPhone	Add Note to Shortcuts
Work L	Share Note...
Deskto	Copy Shareable Link ⌘/
Thinkin	Stop Sharing Public Link
Play La	Present ⌘↵
Play	Present on Another Screen ⌥⌘↵
[Work]	Export Note...
<([Min	Save Attachments to Folder...
System	**Copy Note Link**
Critica	Move Note to... ^⌘M
Conve	Copy Note to...
Diverg	Move to 'B. Unimportant' Again
iPad	Duplicate Note
	Merge Notes ⇧⌘M

Notebooks

The notebooks in Evernote help with prioritizing your notes as either Important or Unimportant. There are 3 required notebooks for the RWMs:
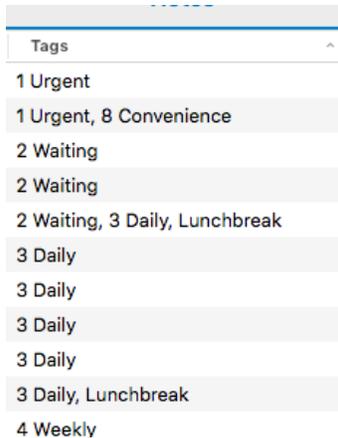
> -Inbox
> A. Important
> B. Unimportant

Spelling the notebooks with prefixes of -, A., B. means the notebooks will show up in the sidebar in order. All notes will land in the -Inbox and you will choose which existing notes to put them in or whether a new note should be created. New notes might just be text that needs to go into an existing note object in Evernote, so I guess it's important to be clear here that notes are essentially just text that you've inputted that needs to be formatted to conform with the RWMs protocol. By putting the text into a note, you've essentially marked it as Important/Unimportant, because **Note Objects must be in a Notebook that is not Inbox**.

Tags

You have the ability to tag notes to mark their urgency level as either Urgent or some other interval of urgency. For instance:
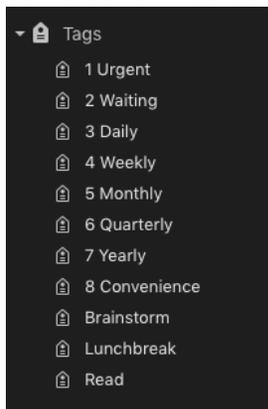
The tags are prefixed with the numbers 1-8 signifying the level of urgency, because when viewing the notes in the A. Important notebook, they can show up in order when you organize by tag, for instance:

Tags	^
1 Urgent	
1 Urgent, 8 Convenience	
2 Waiting	
2 Waiting	
2 Waiting, 3 Daily, Lunchbreak	
3 Daily	
3 Daily	
3 Daily	
3 Daily	
3 Daily, Lunchbreak	
4 Weekly	

All leaf notes within the A. Important must have an urgency tag (prefixed with a number).

> Tags without a number prefix are what I loosely describe as 'energy tags.' Energy tags can be used two ways, but are rarely used. However, I'll describe how to use them if needed.
>
> All tags balance time and energy, but ideally, we'd like to balance our energy, not our time. If everything is always some level of urgent, then we feel like the work is never done, therefor having energy tags means 'when I have energy to do it.' This is very similar to the 8. Convenience urgency level, but with one key difference. The energy tags can be used to pinpoint when a note should be considered. For instance, we can try to get a haircut on our lunch break, but if we don't have the energy, then it doesn't really matter. You can mark other notes with the Lunchbreak tag to pinpoint what is possible during your lunchbreak.
>
> The second way energy tags can be used are to make new notes tangentially related using the search feature. When you have a lot of notes and want to make a new note on something like 'Brainstorming,' you can search for the word 'Brainstorming' or something related and tag relevant notes with the tag 'Brainstorming.' Then you can create a new 'Brainstorming' note, filter by the energy tag ('Brainstorming') and copy the links from that filtered list into the word cloud of your new 'Brainstorming' leaf note.

Shortcuts:

This was probably the hardest thing to get right in the RWMs, as the shortcut list is what shows up regardless of what device you use. Therefor, I decided to make the shortcut list mainly about devices, so no matter where I'm using the RWMs from, I have a certain amount of context regarding the fastest path to either looking up my notes or processing my notes. My shortcuts are listed below:

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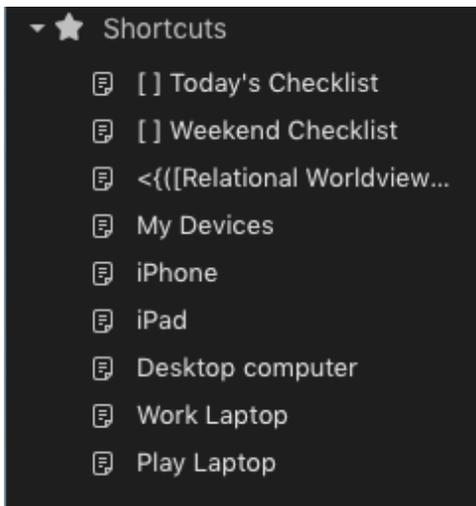
Four Phase Lifecycle of RWMs

Ok that's the main landscape of the RWMs, now I'll go into the 4 phase lifecycle of the RWMs. Integrating Notes, Raking Notes, Surfing Notes, Cleaning Notes. I'll try to keep it short, hang in there. ~~My notes enter the –Inbox notebook through an app called Fastever, but you can use the Evernote application if you want. I just found it to be too slow.~~

> ~~Fast Ever to input notes into Evernote~~
> ~~My preference if for an iOS application called FastEver[4], however, it is possible to take notes using any application you find secure and useful. Just make sure it puts notes into the –Inbox notebook.~~

*Update: I set up Apple shortcuts to save my notes. More information can be found here: https://support.apple.com/guide/shortcuts/welcome/ios

Here is what the shortcut looks like.

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[4] https://apps.apple.com/us/app/fastever-3/id1484155047

Phase 1: Integrate Notes

This is the most common activity of the RWMs. It's the process of sorting and moving New Notes from the –Inbox notebook into Leaf Notes in either the A. Important or B. Unimportant notebooks. You have to choose to either make a new Leaf note or add the New Note to an existing Leaf Note. Be sure to update the priority notebook and urgency tag as you go. **Highlight the important elements of a note so it sticks out to you later.**

Pro-tip: you're -inbox is going to be flooded with notes on basically so many things it can be overwhelming, so select all of the notes in the inbox by holding down shift and selecting two or more notes, excluding the ones with a special prefix, then let go of shift and select 'Merge.' Then in the new combined note, select all the content and bullet point everything. Then starting at the bottom, place the cursor next to the bullet point of a piece of body text (not title text) and hold shift and press up so all of the title text is highlighted and delete. Then you can repeat to delete all the title text and your notes will be cleaned up and ready to Integrate.

When making new notes, consider adding brackets to the title.

Phase 2: Rake Notes

I do this usually at the beginning of the day. This is looking through the A. Important notebook, especially at the 1 Urgent Tag for what I must start doing right now. I'll also browse the –Inbox to see if there isn't something even more Important/Urgent that must be done first.

Phase 3: Surf Notes

This is an end of the day activity that I do to see if there isn't a note that needs attention, such as vehicle maintenance or research. It's basically just browsing your notes.

Phase 4: Clean Notes

All the time it's important to follow the **OHIO principle**. OHIO stands for Only Handle It Once. If you see something wrong with your notes, fix it. Garbage in, Garbage out.

Chapter 3: Practice

How to input notes

Notes can be taken in a variety of ways, but my preferred way is through an application called FastEver. You have to grant the app access to your Evernote every year, but it's an app that you can use to quickly push notes into your Evernote without having to wait for your data to load. This is critical when you're trying to take quick notes with one hand. At this point you don't have to tag anything, except for notes related to time or money. For notes regarding something you've purchased, perhaps taken as a way to double check your bank account later, write

the note starting with the amount in numerical digits. For instance, "5 coffee." I usually round up, but feel free to be as precise as you want. It's an art not a science. For time spent working on a paid project, prefix the note with "min" or something. **The important point is notes just have to be something you want to remember.**

"Plant milkweed to bring back the Monarch butterfly" note example:

Ok, so lets walk through integrating your first note and assume there is a note waiting in your inbox that says "Plant milkweed to bring back the Monarch butterfly." This an example of something that would easily slip through the cracks without the RWMs system, as there are usually too many other competing priorities that would distract from simply writing this down when you're at the park with the kids and you happen to think about it. However, with RWMs, using an app like FastEver, you can quickly take the note and categorize it and prioritize it when you have extra time sitting at home later, when the kids are playing video games or something.

So you open up two Evernote Windows on your desktop, one at the -Inbox notebook with the New Note displayed and the other will be used to find the Leaf Note that is most closely associated with the New Note. I'll think of why I wanted to save this note and remember my note about Environmental Sustainability, which I know is a value of mine and can be found in the Values note, which is linked to my RWM(trunk) Note. I go to my RWM(trunk) note, then my Values note and find my Environmental Sustainability Note. I put the New Note under the to-dos section of the Environmental Sustainability Note.

Then the magic happens. This is going to make me think of my Projects note, so I'll check if Projects is not already linked in the Environmental Sustainability note. It's not, so I'll ask myself if it should be. Yes, why not have a project for planting milkweed to save the Monarch Butterflies? Not enough time? Well perhaps not now, but maybe later. This is the typical Important, but not Urgent task that we're so used to ignoring.

So I'll first copy the link to my Environmental Sustainability note and then find my Projects note through any means (this is where it's very personalized as you'll typically be the only one able to find these notes.). I know the Projects note is under Businesses note, because my business does projects and there is a Project Management note in there and there is my Projects note! As you can see, the associations go from strong to weak because it makes it easier to find the notes when searching for them in the future. I'll then space, pipe (|), paste the Environmental Sustainability Link into the word cloud of the Projects note.

Now I'll ask myself if this association is one-way or two-way. For instance, whether it makes since that I would want to do projects for environmental sustainability. The answer is yes, so this is a two-way relationship. So I have to put a link to Projects inside the Environmental Sustainability Note.

So I get a copy of the link to the Projects note and click on the Environmental Sustainability link I just pasted to go back to the Environmental Sustainability note without having to remember how to get there. I then space, pipe, paste the projects note inside Environmental Sustainability and I'm done.

Typically, as I'm inputting my notes, I'll have lots of weak associations come up and it's hard to link all of them, but I try to link as many as I can remember. The trick is to not get caught up in the weeds and make every possible connection, as this would bloat the link cloud and make it harder to find the notes you're looking for in the future. That's why it's important to stick with the strongest associations you can.

Getting Started:
Ok, you're ready to get started. Here are some steps to point you in the right direction.
1. Sign up for an Evernote Account and create three notebooks, -Inbox, A. Important, B. Unimportant
2. Download Fast Ever and link it to your newly created Evernote Account. Configure the app so new notes are put into the inbox notebook
3. Make your Trunk Note and name it <{([Relational WorldView Model])}>
4. Take your first New Note to practice the process. It could be something like 'Goals' and it should end up in your –Inbox.
5. Create your first Leaf Note and save a template, then create another new note and use the template to populate the New Note 'Goals' into your first Leaf Note. Name your new note using all the brackets for each of the RWM quadrants like this <{([Goals])}>.
6. Copy the link to this goals note and put it in each of the 4 quadrants of your <{([Relational WorldView Model])}> note.
7. In the todos section of your <{([Goals])}> note, write a couple of SMART goals. [5]

Additional Tips:
- When starting out, be mindful of the level of sensitivity when taking notes. Taking too many notes creates a backlog of work to do later when you're integrating them. To test whether a note should be taken, ask yourself if it's useful or not.

Summary:
I think you'll have great success with the RWMs. Notes can be anything, just be sure the object of your attention is accomplishing your goals. I have a note for a Boston Qualifying Marathon Attempt. New notes can be anything too, like 'buy milk' which

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[5] https://www.mindtools.com/pages/article/smart-goals.htm

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you could add to a grocery list note. I've found it very helpful for saving links to presents or things I want to buy. It's a very comprehensive system that takes an upfront investment, however, once you get process down, it's nice to be able to sit back and consider your options when making decisions. Further, having the ability to store and retrieve tidbits of information is useful in day-to-day life.

Eventually, you might have notes like: Chores/Errands, Budget, Movies to watch, Restaurants to try, Mindfulness, or Covid-19 with links to resources in my area. Perhaps you could make a News note with links to podcasts and blogs, or a Research note with different topics of interest. There's could be a Scheduling note with a Group Ideas note or a note for Grad School with child notes for each one of your classes. There could be a Charity note or just a Today's Checklist note.