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## I - Basic Starting Place:

1. We are aiming for a life of goodness – well-being within ourselves (*eudaimonia* in Greek, *osher* in Hebrew) and well-being with others. Our vision for a life of goodness must be specific in each area of our lives – our inner lives, our interpersonal lives, our lives with others, our work lives, our creative lives, our spiritual lives, etc. To live optimally in any area of our life, we must be able to regulate our thoughts, feelings and emotions, speech, behavior so that they align with our vision.
2. Our vision, to the degree that they refer to values, translate to duties. We have duties toward our own well-being and the well-being of others. In spiritual terms, we also have duties toward our souls. In religious terms, we have duties toward God. At one level, the only thing that matters is duty. Duties can conflict; wisdom is required to set our hierarchy of values and duties.
3. One aspect of our **duty** to our own well-being is to pursue **authentic happiness** (well-being rooted mostly in the world of value, less in the world of gratification). The further reach of happiness is “**bliss**.” When we cannot find authentic happiness or bliss, we must be **resilient** in performing our duties. One way that we can strengthen resilience is to know that **everything we do matters**, everything we do makes a difference.
4. Part of our vision is aiming specifically to fulfill our moral duties to others. Morality is essentially concerned with not causing intentional, negligent, avoidable, and unnecessary harm. In normal lives, this mostly includes emotional harm done with words, gestures, and behaviors. Morality also requires us to benefit others, when possible, except for people who are doing harm, as defined earlier.
5. We all have **inner destructive patterns** - resistance to what is good, right, true and beneficial. This inner resistance has the effect of diminishing our well-being in both arenas, well-being within, and well-being with others. Our destructive patterns also diminish the well-being of others. This **resistance**, in general, affects our thinking, feelings, emotions, speech and behavior, as well our physical well-being. (In Jewish spiritual psychology, this resistance is called the “Yetzer Ha-Ra” – the Destructive Shape or Pattern. This term is sometimes translated as the “Evil Urge” – a misguided translation in my mind.
6. Summary: we are aiming toward well-being in a moral and spiritual framework. To sustain well-being, we must battle resistance. Within that aim and framework we are seeking

meaning and purpose in our lives. Put more precisely: we live so that meaning and purpose can find us.

## II: Two Basic Understandings of Wisdom Work

1. Conceptual – Vision, Will, Skill, Reflection/Evaluation – An Overview of Wisdom Work
2. Procedural – Virtue, Rationality, Wisdom and Depth – The typical stages and states in which wisdom work is conducted.
3. Caveat: The fallacy of lists, systems, programs, concepts, stages and systems – and the necessity of such.

### A Conceptual Understanding of Wisdom Work: Vision, Will, Skill, Evaluation

- A. A somewhat precise and reality-based **vision for yourself**, rooted in wisdom, for how we want to be, optimally, in each main arena of our lives, including what our moral duties are. Ultimately, we are aiming toward authentic happiness, human self-actualization and fulfilling our moral duties to others.
1. Physical Well being
  2. Inner life –
    - i. regulating thoughts, feelings, emotions to create inner well-being. Virtue, Rationality and Wisdom required; Depth work ideal.
  3. Interpersonal life – spouses or other long-term relationships, children, parents, other family and close friends
  4. Social Life
  - 
  5. Work
  6. Recreation
  7. Various Interests
  8. Following is a list of various possible inner life elements of a vision (positive ego-states):

- a. Commitment to be safe and healthy - physically, emotionally, mentally and spiritually.
- b. Moral – have a conscience, including empathy. Do not cause intentional, unnecessary, avoidable or negligent harm to the innocent; benefit the worthy when possible.
- c. Respectful
- d. Rational – reasoning well, including moral issues – processing, problem solving.
- e. Wisdom: Insightful - Reflective - Inner clarity – insight into self, others, motivations, the situation
- f. Capacity for care, love, generosity, tolerance and intimacy
- g. Ability to thrive in community – social interaction
- h. A sense of power and freedom in life
- i. Capacity for depth and transcendence.
- j. Creativity /Adventure / Humor
- k. Grieving well
- l. Industrious / Work,
- m. Learning
- n. Pleasure/fun
- o. Cultivating Virtues – Spiritual well-being over pleasure gratification
- p. Continuous development physically, socially, morally and spiritually
- q. Meaning in life; purpose, transcendence.
- r. Knowledge of the Divine – Devotional Life

B. The **will** to do what is necessary to achieve our visions – going from a good idea to actual implementation (based on Assagioli's *The Act of Will*)

1. The Strong will is absolutely necessary but not sufficient for wisdom and transformation. The strong will is our dynamo, and can be the sources of resilience. The Strong Will, however, can go from rigidity but devolve into chaos. Strong will can also be manifested in defense mechanisms, deceptions, destructive patterns, habits and assumptions. The Strong Will is associated with Fast Brain, Slogans, etc.
2. Skillful Will – exerted by the Higher Self – manages and regulates the ego states arrayed in the Unconscious Ego Self. The skillful will manages the strong will. The skillful will applies gives us the skills to manage the resistance in the ego-self to our vision.
3. Good Will – Connected to Love, Justice, Truth and Beauty – rooted in our visions
4. Transpersonal will – Connected to the Holy and the Divine

C. Further developing the specific inner life and interpersonal **skills** to be able to achieve our visions – self regulation, including Roberto Assagioli's Stages of Willing (*The Act of Will*, part two). For example, moderating language, internally and with others.

**D. Reflection and Evaluation** – constant evaluation of all the above.

A Procedural Understanding of Wisdom Work – Virtue, Rationality, Wisdom and Depth

Our visions should be rooted in Wisdom and Rationality, and we must be able to marshal the energies of the Will, develop skills and manifest all of this in a life of Virtue.

To be an agent of the good, of human flourishing in every arena of our life we should have clear path. The following is an example of such a path – The Virtue and Wisdom Path. In rough order of acquisition, the path is Virtue, Rationality, the Will, Wisdom and Depth.

**Virtue As Restraint**

- i) At a beginning level, virtue does not mean that we don't engage in negative thoughts, feelings and emotions. In quiet, reflective times, we must acknowledge all the thoughts, feelings and emotions that flow in the inner life. Virtue does not mean that we censor or repress.
- ii) At its foundation, Virtue means *not expressing or acting on* negative thoughts, feelings and emotions that will likely be hurtful to others or harmful to a relationship.
- iii) At a more advanced level, we do work on managing our inner life thoughts, feelings and emotions, not just the expressions of those ego-states. At this more advanced level, we regulate whatever causes misery within ourselves or how we cause misery to other people. We can go from acting virtuously to becoming people of good character. Virtuous regulation is the beginning of the path to rationality, wisdom and depth.
- iv) The main metaphor for a life of Virtue is "The Wall of Virtue." For most beginners, virtue is rooted in regulating anger and criticism on one hand, and defensiveness on the other.
- v) Once the Wall of Virtue is set up, we don't speak or act in ways that makes things worse. We can process internally our thoughts, feelings and emotions at a later time in the reflective and rational practices of the Wisdom Mills (described below) and other wisdom practices.
- vi) The "Wall of Virtue" is created from wisdom. It is called a "wall" for moments when we can't access wisdom – we have to go to trained responses.

vii) Virtue – it does not matter how we feel or what they do – we restrain our speech and behavior according to a pre-set wisdom code, until we can calm down and process within ourselves and eventually, ideally with another person. The Wall of Virtue is not repression, it is restraint. We restrain destructive behavior and transfer those energies to the Wisdom Mills (described below).

viii) The Wall of Virtue against Bad Habits, – NoFour C's – No Bad JEDDI

The Four C's (commit to this in the morning when you wake up, and several times a day)

1. I will not speak in anger. I can have anger, but I will not speak, text or email in anger.
2. Specifically, I will not **criticize** others (finding fault in an unkind way - including unsolicited advice, using tone of voice or insinuations to express criticism, dominating others, controlling others or telling them what to do, think or how to be).
3. **complain** about them to themselves (often: "why-ning").
4. **condemn** others (accuse, assume, blame, label, unkindly compare, cut down or put down, insult or show contempt with words, gestures of facial expressions), or
5. engage in escalating **conflict** (arguing). Once you realize things are not going well, disengage.
6. If you do any of this – apologize. And always know - there are ways to get what you want or to correct another person's behavior outside of anger, criticism and defensiveness. These bad habits don't work well in the long run.

If you are being angered at or criticized, remember: No bad JEDDI (explained below). If someone is criticizing or venting anger at you, you will minimize defensive behavior after a couple of tries. Train yourself not to do the following (commit to this when you wake up and several times a day). Do not engage in the following to a hostile resistant person after a couple of tries.

1. **justify**

2. **explain**
3. **defend**
4. **demand** (that they do or not do something),
5. **deny** (what they have claimed) or
6. give more **information** (JEDDDI, or JEDDI for short)
7. **until they calm down and are ready to process.**

ix) Detail on the defensive Wall of Virtue:

- (1) Don't tell an upset person what to do.
- (2) Bad JEDDI does not work. *After a couple tries*, don't tell an angering or resistant person to calm down, what to be, or what to do. Defuse, Deflect, De-escalate (the three D's) and process later. Learn to draw kind, clear, firm and if needed, ruthless boundaries (without rue). After three go-arounds, kindly end the conversation.
- (3) If another person is escalating on their own, Disengage (the forth D), and if necessary, get out of the room (in extreme cases, out of the house/apartment). Do not leave with a "parting shot." Just say something like, "this is not working for me right now; I will be back later so we can talk about this." Avoid passive-aggressive remarks or having to have the last word. Avoid telling other people what they should or should not do without their permission.
- (4) In general (memorize and train).

If someone says something with which you disagree, be affirmative and curious before expressing your opinion.

Do not let the behaviors of others determine your behaviors:

**"It does not matter what other people do; what matters is the kind of person I want to become."**

**"Do not try to persuade a resistant person (a person in an irrational state) to do, not do, understand, realize or be aware of anything. Take no for an answer, or some version of no. Just decide what you are going to do next, and make sure it is wise and does not make things worse. If nothing, then nothing." 'Taking no for an answer' reduces conflict and does not give meaning to the other person being resistant.**

You must draw boundaries with an angry or hostile person, just don't match their anger and criticism.

When we ask things of people, they often say "yes" but mean "no." People not doing what they've agreed to do often causes anger and the Four C's.

Remember, a person's not saying yes is a way of saying no. People often avoid saying "No," so you have to detect a "constructive" no – anything but yes.

Ask for what you need with great specificity – something that can be video-recorded. In a tough moment, every word counts. Be precise. No big prefaces. One sentence of background, and then ask, "Here is what I would like you to do or not do" (Obverse: "what would you like me to do or not do?")

People can respond with "Yes," "No," or "Maybe" (in their own words).

If *you* are asked to do something or not do something simple that is not immoral, or does not endanger life, limb or fortune and has no long-term consequences, typically let people have what they need for now. Buy time and process later.

Don't control or boss people around.

**No arguing** – three rounds, step away. Process later.

### **Rationality – thinking well**

1. A grasp of the facts of a situation. The ability to see things as objectively as possible, using precise language, not attached to our narrative, our inner persuasive monologue.
2. The "Police Report"
  - i) The ability to tell yourself a simple account of what happened, the basic outline, no narrative, no drama, no metaphors. Here are some things to pay attention to as you construct for yourself, and perhaps eventually for others, the bare bones chronology.
    - (a) If you were hurt:
      - (i) Know the difference between "hurt and wronged" to use William Glasser's expression. Hurt is having a need disappointed, usually an unconscious one. Wronged means a moral rule was broken. Usually, we are hurt because

someone engaged in anger or the Four C's or was negligent in their words or behavior.

- (b) What precisely, exactly did the other say or do or not do that triggered you or that you experienced as being unfair.
- (c) What did you feel as a response?
- (d) What did you say as a response?

The precise “police report” moves us to a rational understanding of what we and others are going through.

3. A further dimension of reflection on what has occurred is the ability to identify the nature of the verbal transactions – see *Games People Play* by Eric Berne – Transactional Psychology
4. After you have assessed the facts of a verbal transaction or incident, develop the ability to create good theories based on facts of the “police report.”
5. A rational practice includes the ability to name ego-states and to be able to regulate thoughts, feelings and emotions, and therefore speech and behavior, based on a rational grasp of the facts.
6. The ability to process well with others in a rational way – discuss and solve without giving in to unregulated thoughts, feelings and emotions that get in our way.
7. As preparation for processing with another.
  - (a) You must internally work through an incident BEFORE you process with another person. The reason you are creating a bare-bones chronology is to dis-attach you from your narrative, so that you can be more rational. Virtue and rationality are the first two steps in creating inner well-being and well-being with others.
  - (b) If you intend to process an incident with another person, have your wall of virtue up. Before you process with another, do your own inner “police report” (the other person will have a different police report; that is to be expected).
    - a. When you process with another person, they are often not interested in your feelings or narrative. You have to be prepared to guide a conversation toward simplicity, not narratives and feelings. Narrative and feelings are for later when everyone concerned is in good and positive ego-state.



## 8. Applied Rationality: The Wisdom Mills

- a. Wisdom Mill #1: (based on the work of William Glasser) A rational assessment of our needs and replacing irrational needs with rational ones.
- b. Know that all anger and hurt come from our **needs, expectations, entitlements and demands** (NEEDs) not being met. Getting angry or depressed when your needs are not met is an indication that your needs might not be moral, rational or useful.
- c. Try to define to yourself your irrational or not useful needs or expectations clearly.
  - (a) “I need to be treated with respect.”
  - (b) “I expect people not to do irrational things.”
  - (c) “I demand that other people do the right thing.”
  - (d) “I demand that people not to get attached to their point of view.”
  - (e) “I am entitled to get what I want.”
  - (f) “I need people to take my good advice.”
  - (g) “I expect them to believe me.”
- d. In assessing our needs, we take our focus off what others have done and focus instead on what our need was.
- e. We assess whether our NEED was Moral, Rational and Useful. We typically find that if our NEED’s create anger or another disruptive ego-state, they don’t pass the MRU test. We therefore must change our needs – either a rational, useful need of someone else, or a rational, useful need of ourselves.
- b. Wisdom Mill #2 (based on Albert Ellis). A – B – C – D. In brief: Activating events or adversity are run through irrational beliefs. These irrational beliefs result in negative emotional Consequences. We should engage in inner Discussion in order to help is understand activating events, expose our irrational beliefs and cultivate better emotional consequences.
- c. Rational assessment of our Beliefs and changing the irrational beliefs that produce disruptive emotional Consequences into beliefs that produce good emotional consequences that align with our vision.

1. **Activating / Adverse Events** are run through a **Belief** system (produced by the ego self) and then manifest as emotional **Consequences** that appear rational and warranted. We need to have an inner **Discussion**.
2. Try to define your irrational belief, for example: “People should be what I want them to be,” “I should be permitted to tell people what to do, think, say, believe or be, even when they don’t ask me.” Try to define the belief as precisely as possible.
3. Replace irrational Beliefs (“should’s”), with Beliefs that lead to good emotional consequences, no matter what the Activating / Adverse initial event was.
4. Main point: Move away from irrational needs and beliefs and focus deeply on “what is,” reality, how things are, what the other person is like, what the situation is, what is happening. Move away from immediately going to needs and “should’s” and focus first on “what is.”
5. If you realize that you have acted on irrational needs or beliefs (“should’s”), change your beliefs to rational ones, take responsibility and move on.

## **Wisdom**

Wisdom may be defined as:

1. Insight into yourself
2. Insight into others - overcoming the natural narcissism of the negative ego-states of the unconscious ego-self (defined later)
3. Understanding what is happening between you and another person at a given moment.
4. At a further level, a wise person has some understanding of the human condition and processes that individuals, relationships and groups go through.
5. A wise person has some sense of the good that we are seeking within themselves and with other people; what things should be like.
6. A wise person seeks rich factual knowledge about the things that concern them, not just have opinions.
7. A wise person is rational – thinks clearly about all the above.
8. From my perspective, a wise person can put all of this into action, as an act of will, to govern, speech and behavior. Wise speech and behavior together constitute virtue. Virtue takes training.

9. At a foundational level, a wise person has the will and skill to intervene when negative ego states take us over, based on Wisdom as Insight. A wise person is committed to a good vision and living in a moral framework.

Wisdom as insight, intervention and transformation practice: From the perspective of the higher self, we examine disruptive ego-states arrayed in the unconscious ego-self with the purpose of exerting interventions: Some common negative ego-states are:

- |  |   |
|--|---|
| 1. Anger at others (leading to the Four C's) | 12. Anxiety                                     |
| 2. Anger at yourself                         | 13. Envy  |
| 3. Defensiveness (bad JEDDI)                 | 14. Destructive drives / need for gratification |
| 4. Hurt                                      | 15. Ambivalence                                 |
| 5. Resentment                                | 16. Control - Domination of Others              |
| 6. Despair                                   | 17. Accommodating Others                        |
| 7. Depression                                | 18. Confusion                                   |
| 8. Grief                                     | 19. Victimhood                                  |
| 9. Guilt                                     | 20. Stubbornness                                |
| 10. Irrational Obligation                    | 21. Procrastination                             |
| 11. Feeling Shame                            |   |

We use skills of rationality to define precisely a given ego state as well as discern the relationships among the ego states. From the higher-self, bring to bear positive ego-states (for example, those outline in the vision section, above), so that our unconscious ego-self is trained in the habits that realize our vision for ourselves.

1. An “ego-state” is an organized sub-personality, consisting of various patterns and habits of thoughts, feelings, emotions, images, sensations, intuitions, drives and impulses.
2. Using my terminology, ego-states are arrayed and layered in the Unconscious Ego-Self
3. Some ego-states are adaptive to our vision for wellbeing some are not.
4. I called our normal, neutral ego-state functioning in our field of consciousness the “A state”: Attuned, aware, adaptive, accountable.
5. When under stress, we often go to a “B” self to handle a situation – for example, anger, defensiveness, despair, guilt, confusion.
6. When the “B” state wears out or is unsuccessful, various other ego-states may appear. An angry ego-state might give over to a despairing ego-state or a depressed ego-state. We all have “A, B, C, D . . .” selves
7. The different ego states are connected to each other.

### **Insight, Intervention and Transformation**

Every ego state has a narrative, a brief one or two sentence story to tell. Once we can name and ego state we have to understand it's in her life – it's "theory" as it were. Once we are able to understand the inner life of a given sub personality or ego state, the higher self asserts a regulation. We are not try to get rid of sub personalities and negative ego states. They can be a kin to children or adolescents. They must be raised and educated with care and love.

Once an ego state or sub personality is regulated with care and love we can begin to exert a different ego state in its stead. Substituting a positive ego state for a negative ego state is the foundation of human transformation.

## Depth

In the procedure of wisdom work, basic mastery of virtue, rationality and wisdom allows us to develop and sustain a connection with our depths as human beings. The idea of depth is developed below, in the section on the map and basic terminology.

### The Map and Terminology Necessary for both aspects of Wisdom Work, conceptual and procedural (rooted in the work of Roberto Assagioli)

His terms: the negative forces in the **plastic unconscious** vie to use the **will** to find expression. We must use the **skillful will** to intervene against that expression, and instead express what we find in the **good will**

#### Finley's adaptation

1. Higher Self
2. The Field of Consciousness, Contents of Consciousness, neutral ego-state
3. Unconscious Ego-self – the array of various ego-states.
4. Archetypal Unconscious / The Shadow / The Soul

#### The Higher Self

##### Four Levels of the Higher Self Essential for Wisdom Work

1. Observer Mind - observe what is happening in my field and contents of consciousness and also what is occurring in the unconscious ego-self.
2. Objective Mind – Evaluate what is happening within. Ask whether a given ego state is connected to reality, proportionate to the situation, and likely to make things better in my inner life or with others. Infer what is happening in others, what are their standpoints, what is their subjective reality. "Police report" – what happened, in what order - no drama.

3. Rational Mind – Inner processing, using reason, attachment to facts, creating good theories, wisdom mills.
  - a. Moral Mind – an aspect of the rational mind when a moral issue is at stake – for example, issues of justice and fairness.
4. Truth Mind – the deeper truth of a situation, how the human condition is reflected in a given moment.

Five further levels the higher self that address the further reaches of human nature. Typically, we can more fully address these stages of the higher self once we have relative mastery of the first four levels of the higher self.

1. Love
2. Beauty
3. The Good (philosophic good that guides the life of value)
4. The Holy
5. The Divine

### The Field of Consciousness

This is the habitual neutral state in which we process our lives and from which we manage our lives. We are normally and habitually, without a specific act of will. I called the ego state in our neutral field of consciousness the A state – attuned, aware, adaptive, accountable.

The ego-states on the unconscious ego-self autonomously will themselves, by habit (neural pathways) into the field of consciousness for better or for worse.

Further definition of the A state:

1. Aware of our environment
2. Attuned to our environment, responding to stimuli from within and without.
3. Accountable – we normally individually or accountable for our speech and actions.
4. Adaptive - we habitually adapt ourselves to our environment and adapt to the various stimuli.
5. A given stimulus make causes to engage a given ego state through habit, positive or negative. Depending on the stimulus and our habits, we might become focused or distracted, fearful or courageous, anxious or rational.

### The Unconscious Ego-Self –

1. Composed of various ego-states (amalgamations of thoughts, feelings, emotions, images, intuitions, sensations, drives and impulses). In the unconscious ego-self, we find habits of

processing external and internal events, according to unconscious patterns, some of them destructive. The unconscious ego-self can be seen as a lens and prism by which we understand and experience the world.

2. Some of the ego states and habits of the unconscious ego self are good and adaptive in realizing our vision for ourselves. The Unconscious Ego-self is not bad, but it is where bad patterns and bad habits operate, outside the conscious mind, often against our vision for ourselves. Resistance to our vision and conscious will is formed in the unconscious ego-self. The more we make progress in realizing our vision and cultivating the world and skill the more profound the resistance becomes.
3. The habits of unconscious ego-self process the world quickly, get us through our days, but are not qualified for complex thought. (See above for positive and negative ego states)

### **Depth:**

Archetypal Self – The Deeper Unconscious – The Soul - Personality - Many chambers, e.g.,

1. Values – moral and non-moral
2. Meanings – meaning of poems; meaning of life
3. Qualities – beauty, justice
4. The Will
5. Trauma, grief, wounds.
6. Orienting memories.
7. Roots of disorders that are not rooted in our chemistry and genetics.
8. Inner conflicts.
9. The Process of Grieving and Healing
10. The Soul
11. Play, humor, jokes, informal rituals
12. Poetic mind
13. Mystery
14. Religion, including formal rituals and study of sacred texts.
15. Faith
16. Purpose
17. Experience of love, justice, truth and beauty
18. Dreams
19. Fantasies

**(to be completed)**

### **Practices**

Virtue Practice

Rationality and Wisdom Practices

Processing Well with Others

Spiritual/Depth Practices