

Life Assessment & Goal Identification Tool

Introduction

The aim of this tool is to provide you with a comprehensive way to assess the quality of your life and identify changes you can make to enable you to raise it over the short term ie the next three months since this will give you a foundation to build on. The assessment gives you fifteen of the most essential / useful life areas to rate yourself against. They mainly concern your physical and emotional health and wellbeing, and ability to flourish, flourishing being defined as “the state of living a ‘good life’ by finding fulfilment, accomplishing meaningful tasks, and connecting with others” (Martin Seligman).

Seligman, founder of Positive Psychology, introduced the world to his famous PERMA+ model in his book ‘Flourishing’ in 2012¹. In it he identified five key components people pursue because they are intrinsically motivating and contribute to well-being including Positive Emotion, Engagement, Relationships, Meaning, and Accomplishments (hence PERMA). So why build on it by adding one for Work, five for mind and body and dividing Relationships into five separate ones? Because,

- Relationships are such an important source of life satisfaction and longevity they deserve being expanded
- It is very difficult to flourish if you’re not satisfied with what you do by way of work – paid or unpaid
- How you look after your health – your mind and body – likewise has a major bearing on your well-being

How to complete it

On the table below (Section 1) rate your level of satisfaction for each life area / focus on a scale of 1 – 10 where 10 is the highest it could be. When you’re done review your ratings and identify the two lowest ratings under each of the three categories or dimensions: Your Life, Your Relationships, and Your mind & body. This should give you six crosses in the right-hand column. If you have more than one area rated equally lowly choose the one you would most benefit focussing on in the short term. The assumption here is that low ratings are going to most benefit you taking action on them.

With your priority areas identified go to the Questionnaire Section 2. When you’re ready write the name of the area in the Life Focus box at the top and complete six questionnaires (two for each category). This should leave you with six goals and their associated actions to begin taking forward with potential to improve your life.

An alternative approach: While having your actions spread across the three categories / dimensions helps give you balance don’t feel beholden to this. If your lowest ratings fall mainly under only one or other of the categories complete questionnaires for them instead. This is a tool. Use it in the way likely to benefit you the most. I hope you find it useful.

Kind regards,

Mark Wilkinson

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¹ Go to the end of the document for a full explanation of the PERMA+ model.

Section 1: Life Satisfaction Assessment

No.	Life Area / Focus	Satisfaction on a scale of 1 – 10 where 10 is the highest and 1 the lowest	Priorities for attention (tick or X)
Your Life			
1	Work / how you provide for yourself or others	1.....2.....3.....4.....5.....6.....7.....8.....9.....10	
2	Living purposefully & meaningfully	1.....2.....3.....4.....5.....6.....7.....8.....9.....10	
3	Opportunities to accomplish / achieve things	1.....2.....3.....4.....5.....6.....7.....8.....9.....10	
4	Opportunities to experience flow, engagement, and energy especially outside work	1.....2.....3.....4.....5.....6.....7.....8.....9.....10	
5	Opportunities to have positive experiences	1.....2.....3.....4.....5.....6.....7.....8.....9.....10	
Your Relationships			
6	Family or relations	1.....2.....3.....4.....5.....6.....7.....8.....9.....10	
7	Significant other / love life	1.....2.....3.....4.....5.....6.....7.....8.....9.....10	
8	Friends and friendships	1.....2.....3.....4.....5.....6.....7.....8.....9.....10	
9	Belonging to groups, clubs, or a 'tribe'	1.....2.....3.....4.....5.....6.....7.....8.....9.....10	
10	Relationship with neighbours and wider community ²	1.....2.....3.....4.....5.....6.....7.....8.....9.....10	
Your Mind & Body			
11	Mindset & Attitude to life	1.....2.....3.....4.....5.....6.....7.....8.....9.....10	
12	Diet & eating habits	1.....2.....3.....4.....5.....6.....7.....8.....9.....10	
13	Movement & Exercise	1.....2.....3.....4.....5.....6.....7.....8.....9.....10	
14	Sleep & Rest	1.....2.....3.....4.....5.....6.....7.....8.....9.....10	
15	Brain-health ³	1.....2.....3.....4.....5.....6.....7.....8.....9.....10	

² The amount and quality of your involvement or interaction.

³ How well you are looking after your brain and maintaining cognitive ability, especially important as you age.

Section 2: Questionnaires: A. Your Life

Life Focus			
1. How satisfied are you with this on a scale of 1 – 10	Low High 1.....2.....3.....4.....5.....6.....7.....8.....9.....10		
2. Reason for rating?			
3. In a few sentences what would you need to do to make this a 10?			
4. What is the goal arising?			
5. How challenging is this goal?	..... On a scale of 1 - 10	6. How motivated are you by it?	..... On a scale of 1 - 10
7. How important is it you take action on this goal in the next 12 months?	Very important Important Neither impt. or unimpt. Unimportant Not important at all		Reason for answer (NB. If it's not important skip the rest!):
8. If important when do you need to start / schedule your first action?	Next week Next month Next 3 months Next 3 – 6 months Next 6 – 12 months		
9. What small thing could you do from today to bring you a step closer to it?	Tip: Try writing this as an implementation plan - I will [BEHAVIOR] at [TIME] in [LOCATION]		
10. What conclusion are you drawing from this?			

Life Focus	
1. How satisfied are you with this on a scale of 1 – 10	Low High 1.....2.....3.....4.....5.....6.....7.....8.....9.....10
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9. What small thing could you do from today to bring you a step closer to it?	Reason for answer (NB. If it's not important skip the rest!): Tip: Try writing this as an implementation plan - I will [BEHAVIOR] at [TIME] in [LOCATION]
10. What conclusion are you drawing from this?	

B. Your Relationships

Life Focus			
1. How satisfied are you with this on a scale of 1 – 10	Low High 1.....2.....3.....4.....5.....6.....7.....8.....9.....10		
2. Reason for rating?			
3. In a few sentences what would you need to do to make this a 10?			
4. What is the goal arising?			
5. How challenging is this goal? On a scale of 1 - 10	6. How motivated are you by it? On a scale of 1 - 10
7. How important is it you take action on this goal in the next 12 months?	Very important Important Neither impt. or unimpt. Unimportant Not important at all		Reason for answer (NB. If it's not important skip the rest!):
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10. What conclusion are you drawing from this?			

Life Focus	
1. How satisfied are you with this on a scale of 1 – 10	Low High 1.....2.....3.....4.....5.....6.....7.....8.....9.....10
2. Reason for rating? *Flow, engagement, energy in that order where flow is the highest state.	
3. In a few sentences what would you need to do to make this a 10?	
4. What is the goal arising?	
5. How challenging is this goal?	..... On a scale of 1 - 10
6. How motivated are you by it?	..... On a scale of 1 - 10
7. How important is it you take action on this goal in the next 12 months?	Very important Important Neither impt. or unimpt. Unimportant Not important at all
8. If important when do you need to start / schedule your first action?	Next week Next month Next 3 months Next 3 – 6 months Next 6 – 12 months
9. What small thing could you do from today to bring you a step closer to it?	Tip: Try writing this as an implementation plan - I will [BEHAVIOR] at [TIME] in [LOCATION]
10. What conclusion are you drawing from this?	

C. Your Mind & Body

Life Focus			
1. How satisfied are you with this on a scale of 1 – 10	Low		High
	1.....2.....3.....4.....5.....6.....7.....8.....9.....10		
2. Reason for rating?			
3. In a few sentences what would you need to do to make this a 10?			
4. What is the goal arising?			
5. How challenging is this goal?	..... On a scale of 1 - 10	6. How motivated are you by it?	..... On a scale of 1 - 10
7. How important is it you take action on this goal in the next 12 months?	Very important Important Neither imp. or unimp. Unimportant Not important at all	Reason for answer (NB. If it's not important skip the rest!):	
8. If important when do you need to start / schedule your first action?	Next week Next month Next 3 months Next 3 – 6 months Next 6 – 12 months		
9. What small thing could you do from today to bring you a step closer to it?	Tip: Try writing this as an implementation plan - I will [BEHAVIOR] at [TIME] in [LOCATION]		
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6. How motivated are you by it? On a scale of 1 - 10
7. How important is it you take action on this goal in the next 12 months?	Very important Important Neither impt. or unimpt. Unimportant Not important at all
8. If important when do you need to start / schedule your first action?	Next week Next month Next 3 months Next 3 – 6 months Next 6 – 12 months
9. What small thing could you do from today to bring you a step closer to it?	Reason for answer (NB. If it's not important skip the rest!): Tip: Try writing this as an implementation plan - I will [BEHAVIOR] at [TIME] in [LOCATION]
10. What conclusion are you drawing from this?	

Spare Questionnaire

Life Focus			
1. How satisfied are you with this on a scale of 1 – 10	Low		High
	1.....2.....3.....4.....5.....6.....7.....8.....9.....10		
2. Reason for rating?			
3. In a few sentences what would you need to do to make this a 10?			
4. What is the goal arising?			
5. How challenging is this goal?	..... On a scale of 1 - 10	6. How motivated are you by it?	..... On a scale of 1 - 10
7. How important is it you take action on this goal in the next 12 months?	Very important Important Neither imp. or unimp. Unimportant Not important at all	Reason for answer (NB. If it's not important skip the rest!):	
8. If important when do you need to start / schedule your first action?	Next week Next month Next 3 months Next 3 – 6 months Next 6 – 12 months		
9. What small thing could you do from today to bring you a step closer to it?	Tip: Try writing this as an implementation plan - I will [BEHAVIOR] at [TIME] in [LOCATION]		
10. What conclusion are you drawing from this?			

PERMA+

In his book *Flourishing* (2012) Martin Seligman identified five key components that people pursue because they are intrinsically motivating and contribute to well-being:

- **Positive emotion**
- **Engagement**
- **Relationships**
- **Meaning**
- **Accomplishments**

P – Positive Emotion

Positive emotion is much more than mere happiness. Positive emotions include hope, interest, joy, love, compassion, pride, amusement, and gratitude. They are a prime indicators of flourishing and can be cultivated or learned to improve wellbeing (Fredrickson, 2001).

When individuals can explore, savour, and integrate positive emotions into daily life (and visualizations of future life), it improves habitual thinking and acting. Positive emotions can undo the harmful effects of negative emotions and promote resilience (Tugade & Fredrickson, 2004).

Increasing positive emotions helps individuals build physical, intellectual, psychological, and social resources that leads to improved resilience and well-being.

How to build positive emotions:

- Spend time with people you care about (Kok et al., 2013).
- Do hobbies and creative activities that you enjoy (Conner et al., 2018).
- Listen to uplifting or inspirational music (Juslin & Sakka, 2019).
- Reflect on things you are grateful for and what is going well in your life (Emmons & McCullough, 2003).

A note about optimism

Optimism is a positive emotion critical to building resilience and well-being. Optimism is the belief that life will have more good outcomes than bad. People who are optimistic are more likely to be resilient to stressful life events (Carver, Scheier, & Segerstrom, 2010). Optimistic people tend to live longer, have better postoperative outcomes and lower levels of depression (Carver et al., 2010).

E – Engagement

According to Seligman (2012), engagement is “being one with the music.” It is in line with Csikszentmihalyi’s (1989) concept of ‘flow’. Flow includes the loss of self-consciousness and complete absorption in an activity (“engagement on steroids” as Burnett & Evans put it). It is living in the present moment and focusing entirely on the task at hand.

Flow, or this concept of engagement, occurs when the perfect combination of challenge and skill/strength is found (Csikszentmihalyi & LeFevre, 1989). People are more likely to experience flow when they use their top character strengths. Research on engagement has found that individuals who try to use their strengths in new ways each day for a week were happier and less depressed after six months (Seligman, Steen, Park, & Peterson, 2005). Happiness is one of the many byproducts of engagement.

Ways to increase engagement:

- Participate in activities that you really love, where you lose track of time when you do them (Bonaiuto et al., 2016).
- Practice living in the moment, even during daily activities or mundane tasks (Belitz & Lundstrom, 1998).
- Spend time in nature, watching, listening, and observing what happens around you (Petersen et al., 2021).
- Identify and learn about your character strengths and do things that you excel at (Lai et al., 2018).

R – Positive Relationships

Positive relationships encompass all the various interactions individuals have with partners, friends, family members, colleagues, bosses/mentors/supervisors, and their community at large.

Relationships in the PERMA model refer to feeling supported, loved, and valued by others. Relationships are included in the model based on the idea that humans are inherently social creatures (Seligman, 2012). There is evidence of this everywhere, but social connections become particularly important as we age.

The social environment has been found to play a critical role in preventing cognitive decline, and strong social networks contribute to better physical health among older adults (Siedlecki et al., 2014).

Many people have a goal of improving relationships with those they are closest to. Research has demonstrated that sharing good news or celebrating success fosters strong bonds and better relationships (Siedlecki et al., 2014). Additionally, responding enthusiastically to others, particularly in close or intimate relationships, increases intimacy, wellbeing, and satisfaction.

How to build relationships:

- Join a class or group that interests you.
- Ask questions of the people you don't know well to find out more about them.
- Create friendships with people you are acquainted with.
- Get in touch with people you have not spoken to or connected with in a while.

M – Meaning

Seligman (2012) describes meaning as belonging and/or serving something greater than ourselves. Having a purpose in life helps individuals focus on what is really important in the face of significant challenge or adversity.

Having meaning or purpose contributes to a sense of self-worth but is different for everyone. Meaning may be pursued through a profession, a social or political cause, a creative endeavour, or a religious/spiritual belief. It may be found in a career or through extracurricular, volunteer, or community based activities.

A sense of meaning is guided by personal values. People who report having purpose in life live longer and have greater life satisfaction and fewer health problems (Kashdan et al., 2009).

Ways to build meaning:

- Get involved in a cause or organization that matters to you (Tang et al., 2022).
- Try new, creative activities to find things you connect with.

- Think about how you can use your passions to help others.
- Spend quality time with people you care about.

A – Accomplishments/Achievements

Achievement / Accomplishment in PERMA is also known as achievement, mastery, or competence.

A sense of accomplishment is a result of working toward and reaching goals, mastering an endeavour, and having self-motivation to finish what you set out to do. This contributes to well-being because individuals can look at their lives with a sense of pride (Seligman, 2012).

Accomplishment includes the concepts of perseverance and having a passion to attain goals. But flourishing and wellbeing come when accomplishment is tied to striving toward things with an internal motivation or working toward something just for the sake of the pursuit and improvement (Quinn, 2018).

Achieving intrinsic goals (such as growth and connection) leads to larger gains in wellbeing than external goals such as money or fame (Seligman, 2013).

Ways to build accomplishment:

- Set goals that are SMART – specific, measurable, achievable, realistic, and time bound (Falecki et al., 2018).
- Reflect on past successes.
- Look for creative ways to celebrate your achievements.