

# *Planning on Purpose Discovery Guide*

*The daily pressures to act, to do, to decide, make it difficult to stop and think, to consider, and to examine your life goals, directions, and priorities—to find the best choices you have for managing your own world.*

*Roy Menninger*

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**The HUDSON Institute**  
*of Santa Barbara*

# Planning on Purpose

*I expect to spend the rest of my life in the future, so I want to be reasonably sure what kind of future it's going to be. That is my reason for planning.*  
C.F. Kettering

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## ABOUT THIS GUIDE

This discovery guide is designed to help you reflect on your life. It is an opportunity for you to pause and consider your life chapters ahead, so that you can intentionally create and plan for the future you desire.

We hope that you use this guide to entrepreneur your own future—one in which you compose, design, invent, and weave the next chapter of your life. If you refuse to initiate your own path, your choices will be fewer, and you will likely end up supporting another's destiny and plan.

If you want a future with your name on it, then dream a dream, construct a plan, and make “you” happen. Your ability to sort out what belongs on your path from what doesn't is perhaps the most important ability you have. Choose your destinations carefully, set your sails, find your crew, use your compass, and venture forth to make your best future happen.

# *Personal Information*

## TAKING INVENTORY OF YOUR LIFE

Name:

Today's Date:

How do you feel about where you are at this time in your life?

What do you feel particularly good about? What aspects of your life do you hope will remain constant for a long period of time?

*Relationships:*

*Work:*

*Friends:*

*Family:*

*Health:*

*Personal growth:*

*Community:*

*Location:*

*Finances:*

What aspects would you like to change? How would you like these to be similar to and different from how they are now?



How would you feel if you made these changes?

What has changed your life for the *better*, improving your life style and prospects during the past ten years? Make a short list.

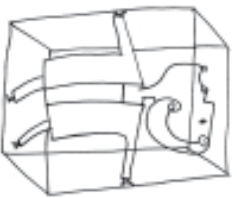
At this time, do you feel that your life is more or less stable, or are you in a time of significant transition?

What areas of life feel the most stable to you?

What has changed your life for the *worse*, diminishing your life style and prospects during the past ten years?

If you are in the midst of transition, what triggered the transition (*personal decisions, external factors, etc.*)?

Describe the most significant changes you anticipate making.



## Start Where You Are

*Everything that happens to you is your teacher. The secret is to sit at the feet of your own life and be taught by it.*

*Polly B. Berends*

Our lives today are filled with increasing amounts of surprises, complexity, and uncertainty. Humans experience a predictable pattern of change—a continuous cycle of ups and downs and in-betweens. The trick is to know where you are in the cycle and how to work that territory. If you are at a peak, you want to plan to stay as long as you can; if you are in a valley, you'll want to plan an exit strategy, let go of what no longer works in your life, and craft a new path ahead.

On the timeline below, note the highs and lows of the last five years. Where are you today?

### PEAKS

5 YEARS AGO

TODAY

### VALLEYS

## Measuring Success

*Until you make peace with who you are, you'll never be content with what you have.*

*Doris Mortman*

### HOW DO YOU COUNT WHAT COUNTS?

What are your measuring sticks, your private ways of counting your success through life? *Money? Position? Acquisitions? Status? Power? Authority? Career Success? Ability to help others? Loving? Parenting? Friendships? Travel? Integrity? Caring influence? Spirituality?*

Choose your top five items from the following list. What are your measuring sticks for the next chapter of your life, in the next few years?

- The accumulation of money and things
- Being validated and respected by others for accomplishments
- Being in love and sustaining deep intimacy, including friendships
- Parenting children
- Being effective and successful at work
- Having fun, and investing highly in your favorite pastimes, hobbies, or sports activities
- Following your beliefs, your spiritual path
- Joining causes you believe in, to make a lasting contribution