



# FOUNDATION ASSESSMENT

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Gain Insights To Live  
Purposefully In Every  
Aspect of Your Life

HALF|TIME  
INSTITUTE™

# GAIN VALUABLE INSIGHTS IN EVERY AREA OF YOUR LIFE

## Benefits of Completing the Halftime Foundation Assessment

Every Halftime Institute client begins their journey with the Foundation Assessment because it yields meaningful insights in the key areas of your life. Clients discuss the results during their initial session(s) with their Halftime Certified Coach, and it guides the client and coach in prioritizing which areas to focus on.

For a limited time, we're making the Halftime Institute Foundation Assessment available to non-clients because we believe it will allow us to have an impact in the lives of those who have not yet enrolled in one of our programs. Our hope is that this tool will be useful and will allow you to gain new knowledge and insights about yourself, your relationships, and your impact.

**May it encourage and challenge you!**

**DIRECTIONS:** Print out this document so that you and your spouse/peer can write directly on the worksheets.

### [1] SELF EVALUATION

First, you will do some important self-assessment into each area, answering a specific question for each area, rating yourself 1-10, ten being optimal.

- Inner World: Personal Growth, Health, Joy/Contentment, Faith
- Surrounding World: Marriage, Finances, Parenting, Friendships
- Outer World: Career, Balance & Margin, Community Impact, Global Impact

### [2] PEER/SPOUSE EVALUATION

Next, ask your spouse (if applicable) and a close friend to also score you in the same areas. This will give you valuable feedback on where your perception is consistent or inconsistent with those you are closest with.

Record your answers and the answers of your close friend and your spouse on the diagram on p. 5 in the Diagram with the circles. Examine this page for 3 things: High scores, low scores, and inconsistent scores.

At the Halftime Institute, we help leaders examine their core, capacity, and context in order to build a life of purpose, joy, and impact. A life of significance is built from the inside out. Without a solid core, or foundation, from which to grow, your ability to make a sustainable difference in the world is minimized. This Foundation Assessment starts with your core and allows you to assess your capacity and impact as well.

**DIRECTIONS:** Please answer the following questions as it applies to your life where 10 means you “feel great” about that area of your life.

## YOUR INSIDE WORLD

### PERSONAL GROWTH

To what extent are you learning and growing as a person and a leader?

1 2 3 4 5 6 7 8 9 10

### HEALTH

To what degree are you managing your health to live at your best?

1 2 3 4 5 6 7 8 9 10

### FAITH

To what extent are you connected to God and growing spiritually?

1 2 3 4 5 6 7 8 9 10

### JOY/CONTENTMENT

To what degree would you say you have joy, peace, and fulfillment?

1 2 3 4 5 6 7 8 9 10

## YOUR SURROUNDING WORLD

### MARRIAGE

To what degree is your marriage thriving, with your best years ahead of you?

1 2 3 4 5 6 7 8 9 10

### FINANCES

How effectively are you stewarding your finances?

1 2 3 4 5 6 7 8 9 10

### PARENTING

To what degree are you connected to and leading your children and grandchildren in what is most important?

1 2 3 4 5 6 7 8 9 10

### FRIENDSHIPS

To what degree are you starting and deepening personal friendships?

1 2 3 4 5 6 7 8 9 10

## YOUR OUTSIDE WORLD

### BALANCE & MARGIN

To what degree are you satisfied with the balance of your life?

1 2 3 4 5 6 7 8 9 10

### CAREER

To what degree has your career been successful and impactful?

1 2 3 4 5 6 7 8 9 10

### COMMUNITY IMPACT

To what extent are you satisfied with your level of impact on your community?

1 2 3 4 5 6 7 8 9 10

### GLOBAL IMPACT

To what degree would you say you're engaged in impacting important causes outside your local community – perhaps those on an international or global scale? (Poverty, economic development, ministry, education, refugees, disaster relief, etc)

1 2 3 4 5 6 7 8 9 10

Your courageous and curious friend/spouse is taking the Halftime Foundation Assessment as an opportunity to reflect on his/her life, its various components, and its impact. As a part of the assessment, he/she will rate himself/herself in the following areas, then compare his/her observations with two people who know him/her well, usually a spouse and a close friend.

**DIRECTIONS:** Please answer the following questions as it applies to his/her life where 10 means you “feel great” about that area of his/her life.

## YOUR INSIDE WORLD

### PERSONAL GROWTH

To what extent is this person learning and growing as a person and a leader?

1 2 3 4 5 6 7 8 9 10

### HEALTH

To what degree is this person managing his/her health to live at his/her best?

1 2 3 4 5 6 7 8 9 10

### FAITH

To what extent is he/she connected to God and growing spiritually?

1 2 3 4 5 6 7 8 9 10

### JOY/CONTENTMENT

To what degree does he/she regularly exhibit joy, peace, and fulfillment?

1 2 3 4 5 6 7 8 9 10

## YOUR SURROUNDING WORLD

### MARRIAGE

To what degree is his/her marriage thriving, with the best years ahead?

1 2 3 4 5 6 7 8 9 10

### FINANCES

How effectively is he/she stewarding his/her finances?

1 2 3 4 5 6 7 8 9 10

### PARENTING

To what degree is he/she connected to and leading his/her children and grandchildren in what is most important?

1 2 3 4 5 6 7 8 9 10

### FRIENDSHIPS

To what degree is he/she starting and deepening personal friendships?

1 2 3 4 5 6 7 8 9 10

## YOUR OUTSIDE WORLD

### BALANCE & MARGIN

To what degree does he/she have a balanced life?

1 2 3 4 5 6 7 8 9 10

### CAREER

To what degree has his/her career been successful and impactful?

1 2 3 4 5 6 7 8 9 10

### COMMUNITY IMPACT

To what extent does he/she have an impact on his/her community?

1 2 3 4 5 6 7 8 9 10

### GLOBAL IMPACT

To what degree would you say he/she is engaged in impacting important causes outside his/her local community – perhaps those on an international or global scale? (Poverty, economic development, ministry, education, refugees, disaster relief, etc)

1 2 3 4 5 6 7 8 9 10

Your courageous and curious friend/spouse is taking the Halftime Foundation Assessment as an opportunity to reflect on his/her life, its various components, and its impact. As a part of the assessment, he/she will rate himself/herself in the following areas, then compare his/her observations with two people who know him/her well, usually a spouse and a close friend.

**DIRECTIONS:** Please answer the following questions as it applies to his/her life where 10 means you “feel great” about that area of his/her life.

## YOUR INSIDE WORLD

### PERSONAL GROWTH

To what extent is this person learning and growing as a person and a leader?

1 2 3 4 5 6 7 8 9 10

### HEALTH

To what degree is this person managing his/her health to live at his/her best?

1 2 3 4 5 6 7 8 9 10

### FAITH

To what extent is he/she connected to God and growing spiritually?

1 2 3 4 5 6 7 8 9 10

### JOY/CONTENTMENT

To what degree does he/she regularly exhibit joy, peace, and fulfillment?

1 2 3 4 5 6 7 8 9 10

## YOUR SURROUNDING WORLD

### MARRIAGE

To what degree is his/her marriage thriving, with the best years ahead?

1 2 3 4 5 6 7 8 9 10

### FINANCES

How effectively is he/she stewarding his/her finances?

1 2 3 4 5 6 7 8 9 10

### PARENTING

To what degree is he/she connected to and leading his/her children and grandchildren in what is most important?

1 2 3 4 5 6 7 8 9 10

### FRIENDSHIPS

To what degree is he/she starting and deepening personal friendships?

1 2 3 4 5 6 7 8 9 10

## YOUR OUTSIDE WORLD

### BALANCE & MARGIN

To what degree does he/she have a balanced life?

1 2 3 4 5 6 7 8 9 10

### CAREER

To what degree has his/her career been successful and impactful?

1 2 3 4 5 6 7 8 9 10

### COMMUNITY IMPACT

To what extent does he/she have an impact on his/her community?

1 2 3 4 5 6 7 8 9 10

### GLOBAL IMPACT

To what degree would you say he/she is engaged in impacting important causes outside his/her local community – perhaps those on an international or global scale? (Poverty, economic development, ministry, education, refugees, disaster relief, etc)

1 2 3 4 5 6 7 8 9 10

**BALANCE & MARGIN**  
SELF \_\_\_\_\_  
PEER 1 \_\_\_\_\_  
PEER 2 \_\_\_\_\_

**MARRIAGE**  
SELF \_\_\_\_\_  
PEER 1 \_\_\_\_\_  
PEER 2 \_\_\_\_\_

**FINANCES**  
SELF \_\_\_\_\_  
PEER 1 \_\_\_\_\_  
PEER 2 \_\_\_\_\_

**CAREER**  
SELF \_\_\_\_\_  
PEER 1 \_\_\_\_\_  
PEER 2 \_\_\_\_\_

**PERSONAL GROWTH**  
SELF \_\_\_\_\_  
PEER 1 \_\_\_\_\_  
PEER 2 \_\_\_\_\_

**HEALTH**  
SELF \_\_\_\_\_  
PEER 1 \_\_\_\_\_  
PEER 2 \_\_\_\_\_

**COMMUNITY IMPACT**  
SELF \_\_\_\_\_  
PEER 1 \_\_\_\_\_  
PEER 2 \_\_\_\_\_

**JOY/CONTENTMENT**  
SELF \_\_\_\_\_  
PEER 1 \_\_\_\_\_  
PEER 2 \_\_\_\_\_

**FAITH**  
SELF \_\_\_\_\_  
PEER 1 \_\_\_\_\_  
PEER 2 \_\_\_\_\_

**PARENTING**  
SELF \_\_\_\_\_  
PEER 1 \_\_\_\_\_  
PEER 2 \_\_\_\_\_

**FRIENDSHIPS**  
SELF \_\_\_\_\_  
PEER 1 \_\_\_\_\_  
PEER 2 \_\_\_\_\_

**GLOBAL IMPACT**  
SELF \_\_\_\_\_  
PEER 1 \_\_\_\_\_  
PEER 2 \_\_\_\_\_

What was difficult about doing this exercise?

Which area are you most motivated to work on? Why?

If you are married, how did your spouse react when you asked them to rate you? Based on their responses, what do you believe you should start, stop, or continue doing in your marriage?

How did your friend react when you asked them to rate you? Based on their responses, what adjustments do you want to make in your life?

What specific actions do you need to take (at the head level or the heart level) as a result of this Assessment?

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_

At the outset of a Halftime Institute program, a client takes this assessment and then he/she discusses the results and insights with his/her coach in order to gain additional perspective and delve deeper. A coach helps the client examine the area he/she desires to work on, identifies what an optimal outcome would be, and develops an customized action plan in those particular areas. The coach also offers accountability in following up on the action plan, increasing the probability the action plan will be successfully carried out.

**Consider enrolling in a Halftime Institute program and getting the support of an expert Halftime Certified™ Coach.** If you'd like to learn more about working with a Halftime Certified™ Coach or joining a peer cohort, there's more information on the next page, or go directly to [www.halftime.org](http://www.halftime.org).

If you're not ready to have a Halftime Certified™ Coach, who will you share your results with? Who will you share your action plan with?

## About the Halftime Institute

For over 20 years, the Halftime Institute has studied and served thousands of high-capacity leaders who sense a yearning to be transformed, and ultimately...in their own unique way... transform the world.

### 3 THINGS TO KNOW ABOUT THE HALFTIME INSTITUTE:

- 1 - We coach, teach, and connect high-capacity leaders to discern and engage in their life purpose.
- 2 - Our world-class programs transform lives!
- 3 - Our network of alumni are faith-filled leaders making an impact in the marketplace, in ministry, and in the social sector.

Halftime is a time to refocus and make a game plan for your next season. It's the time first described in the book, *Halftime - the season of "now what?"*

The Halftime Institute is the leading authority on creating a next season defined by joy, impact, and balance. We've served thousands of men and women from varied backgrounds. We also serve leaders from organizations like Kingdom Advisors, Young Presidents Organization (YPO), and World Presidents Organization (WPO).

### EXPLORE OUR PROGRAMS:

**Halftime One on One Program:** Coaching and curriculum to discern and engage in your life purpose. Self-paced and customized to You.

**Fellows Program:** Coaching, curriculum, and a peer group of high-capacity marketplace leaders engaged together in discernment and discovery of life purpose. Includes in-person and virtual workshops, individual coaching, and optional coaching for spouse. Cohorts begin on a quarterly basis. Limited Availability.

### CONTACT OUR ADMISSIONS TEAM TO DISCERN WHICH PROGRAM IS RIGHT FOR YOU.

Dr. Rhonda Kehlbeck, VP of Admissions  
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[www.halftimeinstitute.org](http://www.halftimeinstitute.org)