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Assessment tool for later life planning – framework

active elders
well being



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1. Introduction

Preparation for later life depends on the individual specific living situation, and it is driven by personal conceptions, hopes, and fears of how one wants to prepare and live in old age. Only comprehensive thinking and reflection about future life allow appropriate activities that help reach the individual goals for successful aging. In the SenQuality project, we, therefore, plan the development of an assessment tool based on a self-reflection in the nine different life domains:



Finances



Emergencies and exceptional circumstances



Mental and physical fitness



Housing



Looks and appearance



Social relationships



Health



Leisure activities and lifestyle



Work and employment.

In a first step the AMEU reviewed already existing assessment and reflection tools and analyzed the corresponding methodology.

The second activity was the development of an assessment tool – framework. In this step, the AMEU forms its own concept which is designed for a self-reflection based on questions and self-assessment. Self-reflection is a method of inner dialog, question-driven thinking about oneself, their characteristics, state, goals, and lead to self-assessment. Self-reflection enables an analysis of the status-quo, past, and reflection on the future and possible conclusions for individual action plans.

People should be motivated based on the current state, past actions, and thinking about the future. That's important because only a clear view on expectations, options, opportunities, and also risks will allow planning. Later life and expectations of how one wants to live when getting older are included in the particular concrete life circumstances in different life domains.

An assessment tool is prepared in the document, which gives the framework for self-reflection and self-assessment on the online platform www.senquality.eu, but the methodology can also be used by experts when they offer support to people in situations of change.

Based on the framework described in this document, there will be domain specific approaches and contents. Self-reflection will be stimulated with domain-specific questions and scenarios that lead to increased awareness, but also a concrete action plan for later life.

2. Theoretical framework

This chapter is intended to present the theoretical background, which is the basis for creating a methodological framework. The chapter includes the theoretical background on self-reflection, self-assessment, goal setting, finding solutions to achieve goals, and preparation for later life.

2.1. Self-reflection

Self-reflection is a deliberate and systematic process of thinking about oneself, one's own characteristics, state, goals, which takes place at different levels (Brock, 2015). Superficial self-reflection encompasses thinking about one's own actions, while deep self-reflection refers to thinking about the levers of actions and focuses primarily on motives, emotions, values, and beliefs. It is an internal dialogue, a look into oneself, a search for answers to the questions one asks oneself: What was going on? How do I understand the collected facts? Can I understand the facts differently? How will I use the knowledge in myself? (Rupnik, et al, 2018).

Self-reflection is the ability to analyze one's own concrete experience, behavior, and process and draw conclusions for one's actions in the future.

Self-reflection is a systematic and in-depth process of self-questioning and self-discovery of the individual. In doing so, the individual asks himself questions such as: What is important to me? What do I believe in? What directs my actions? How skilled am I in this? How do behaviors affect the environment?

When self-reflection is focused on self-evaluation, it turns to self-evaluation, e.g.: How skilled am I? Where are my strengths, where are my weaknesses? (Rolfe et al., 2001).

We now open, semi-structured, and structured self-reflection. Structured self-reflection takes place along a series of open-ended questions and statements. If the answers to these questions and statements are evaluated on a scale, self-reflection transitions to self-assessment (Rupnik et al, 2018).

The reflection spiral in self-reflection comprises the following steps (Admiraal & Wubbels, 2005):

1. **Concrete experience.** The individual forms in his/her mind a concrete past experience/behavior.
2. **Looking back.** The individual analyzes his/her past experience/behavior. An individual looks back at the past and asks questions such as:
 - What did I want? What did others want?
 - What did I do? What did others do?
 - How was I thinking? How did others think?
 - What was I experiencing? What did others experience?
3. **Developing basic insights and understanding of the current situation** in the field of identifying experience/behavior. An individual asks himself questions such as:
 - What is my current condition?
 - What is important to me?
4. **Searching for new solutions in the identified field.** The basis for finding new solutions is an analysis of the past and the current situation. The individual asks questions such as:
 - How else could I work in a concrete experience?
 - What are the possible solutions?
 - How would you use the insights in the future?
 - What are the weaknesses and strengths of each solution?
 - How will I act in the future?
5. **Testing the chosen solution in a new situation.**

References & further reading

Admiraal, W. & Wubbels, T. (2005). Multiple voices, multiple realities, what truth? Student teachers' learning to reflect in different paradigms. *Teachers and Teaching: theory and practice*, 11(3), 315–329.

Brock, A. (2015). *What is reflection and reflective practice?* V: Brock, A. (ur). The Early Years Reflective Practice Handbook. London and New York: Routledge.

Rolfe, G., Freshwater, D. and Jasper, M. (2001). *Critical reflection in nursing and the helping professions: a user's guide*. Basingstoke: Palgrave Macmillan.

Rupnik Vec, T., Gros, V., Mikeln, V. & Drnovšek, M. (2018). *Spodbujanje razvoja veščin kritičnega mišljenja s formativnim spremljanjem*. Ljubljana: Zavod Republike Slovenije za Šolstvo.

Self-assessment

Self-assessment is a complex process based on several steps, stages. Yan and Brown (2017) defined self-assessment as a process in which individuals collect information about their performance, evaluate and reflect on the quality of that process and achievements according to certain criteria. Eva and Regehr (2008) define self-assessment as an individual's ability or the ability to evaluate his/her result and make an evaluation of his/her knowledge, skills, and understanding of a specific field.

The latest findings are based on the fact that self-esteem is an important skill of an individual with which s/he directs his/her behavior. This behavior is then regulated at different stages of the learning, self-reflective process. Before conducting a self-assessment, it is important that the individual understands what criteria to use for self-assessment.

Self-assessment can be divided into 3 phases:

- 1. Preparation phase:** in this phase, we try to find and identify our personal, internal and environmental, external resources to achieve the desired goal.
- 2. Implementation phase:** in this phase, we then monitor our conduct to ensure that our strategies are correct to achieve the goal.
- 3. Assessment phase:** at this stage, we can then identify our values, strengths, and shortcomings. In addition, we can also assess the correctness of the choice of goals and strategy to achieve the goal.

References & further reading

Yan, Z., & Brown, G. T. (2017). A cyclical self-assessment process: Towards a model of how students engage in self-assessment. *Assessment & Evaluation in Higher Education*, 42(8), 1247–1262.

Eva, K. W., & Regehr, G. (2008). "I'll never play professional football" and other fallacies of self-assessment. *Journal of Continuing Education in the Health Professions*, 28(1), 14–19.

2.2. Goal setting and finding solutions

Goals are part of every aspect of life and provide a sense of direction, motivation, a clear focus, and clarify the importance (Meyer, 2003). Goal-setting theory by Locke and Latham showed that clear goals and appropriate feedback motivate people. They claimed that working toward goal is also a major source of motivation, which in turn, improves performance (Locke & Latham, 2002).

According to Locke and Latham, five goals, principles can improve the chance of success (Locke & Latham, 2002):

- Clarity
- Challenge
- Commitment
- Feedback
- Task complexity.

A SMART goal is used to help guide goal setting. SMART is an acronym that stands for **S**pecific, **M**easurable, **A**chievable, **R**ealistic, and **T**imely. Therefore, a SMART goal incorporates all of these criteria to help focus your efforts and increase the chances of achieving your goal.

SMART goals are statements of the important results one is working to accomplish and are designed in a way to foster a clear and mutual understanding of what constitutes expected levels of performance and successful professional development.

The SMART criteria are (MindTools, 2021):

- S – Specific: What will be accomplished? What actions will you take?
- M – Measurable: What data will measure the goal? (How much? How well?)
- A – Achievable: Is the goal doable? Do you have the necessary skills and resources?
- R – Relevant: How does the goal align with broader goals? Why is the result important?
- T – Time-bound: What is the time frame for accomplishing the goal?

For the set goals, it is necessary to find appropriate solutions that ensure its achievement. Strategy for problem-solving and goal-setting includes these steps:

- Precise setting the goal
- Creating a list of all the possible solutions to achieve the goal
- Evaluation of advantages and disadvantages of each solution
- Selection of the best solutions
- Designing action plans and implementation of solutions
- Reviewing the achievement of the goal.

An action plan is a document that lays out the tasks one needs to complete in order to accomplish a set goal. Once goals are set, it is necessary to:

- Create a list of actions
- Set a timeline
- Design resources
- Monitor the progress.

With an action plan needs to be defined: What? (Action steps), Who? (Person responsible), Resources? (What is needed), When? (Timeline).

This content is presented in more detail in Chapter 3. Tips for the Planning Process in A practical guide for later life preparation in different domains.

References & further reading

Locke, E. A. & Latham, G. P. (2002). Building a practically useful theory of goal setting and task motivation: A 35-year odyssey. *American Psychologist*, 57(9), 705–717.

Meyer, P.J. (2003). *Attitude is everything: If you want to succeed above and beyond*. Texas: Meyer resource Group.

MindTools (2021). SMART Goals: How to make yours goals achievable. Available at: <https://www.mindtools.com/pages/article/smart-goals.htm>

2.3. Preparation and planning for later life

Preparation for later life depends on the individual's specific life situation and is influenced by personal perceptions, desires, values, expectations, and fears of how he wants to spend his old age. Only complete thinking and reflection on the future ensure appropriate activities that ensure the achievement of goals.

In preparing for later life, the individual must be motivated on the basis of the current situation, past experiences, and thinking about the future. This is important because only a clear view of expectations, opportunities, opportunities, and also dangers allows for proper planning. Age and expectations of how an individual wants to live in this period are included in his or her situation within each domain.

Before an individual determines the planning of his/her later life, he must be aware of why he is thinking about preparing for later life and what his dreams and vision of age are. Interests, dreams, and vision, motivate him to realize his later life planning.

References & further reading

Kornadt, A. & Rothermund, K. (2014). Preparation for old age in different life domains: Dimensions and age differences. *International Journal of Behavioral Development*, 38(3), 228–38, doi:10.1177/0165025413512065.

Preston, C., Drydakis, N. Forwood, S., Ellen-Hughes, S. & Burch, S. (2018). *Planing and preparation for later life*. London: Center fo Ageing Better. Available at: <https://ageing-better.org.uk/sites/default/files/2018-09/Planning-and-preparing-for-later-life-research-report.pdf>

Rowe, J. W. & Kahn, R. (1998). *Successful Aging*. New York: Random House.

3. Methodological framework – self-reflection and assessment of later life

This chapter includes the concept of assessment of preparation and planning of later life, which was formed on the basis of a theoretical framework.

The concept is based on self-reflection, in which the individual uses questions to analyze and self-assess his current situation, past experiences and actions, and this leads him to think about the future.

Based on self-reflection and self-assessment, the person performs an evaluation according to the set levels. This is followed by self-reflection of the future, setting goals, defining and choosing solutions. Finally, an action plan for the future is drawn up.

Each step includes more detailed instructions that each partner follows in their domain (s) when formulating the concept (starting points, questions, examples, solutions, recommendations, ...). Each partner should take into account primarily theoretical backgrounds when formulating questions for self-reflection and self-assessment. Each domain should be designed as broadly as possible to be transferable and usable in all European national environments.

All quantitative measurement scales below must be a 5-point scale.

3.1. Concept

The concept of assessment of preparation and planning of later life includes 5 steps as follows:

1. Introduce

In this first step¹, the individual learns the general importance of preparation for later life and planning for later life. The starting points prepared in the Guide are presented. The individual learns about the different domains preparation for later life on which he/she can plan his/her old age. In doing so, individual answers various general questions:

- **Why is preparation for later life important?**

An individual self-assessed the importance of preparation for later life based on a self-reflective question. The quantitative method is used.

Example:

| How important is the preparation for later life for me?* | | | | |
|---|---|---|---|---|
| 1 | 2 | 3 | 4 | 5 |
| | | | | |

**Legend:*

- Importance: 1- completely irrelevant, 5- completely important

¹The first step applies to all domains. Therefore, it will be formed at the end when all partners have prepared a concept for their domain.

Example:

Why is preparation for later life important for me?

| <i>Reason</i> | <i>Selection*</i> |
|-----------------|-------------------|
| <i>Reason 1</i> | |
| <i>Reason 2</i> | X |
| <i>Reason 3</i> | |
| ... | |

*Legend: *several answers are possible*

- Why is planning for later life important?

An individual self-evaluates the importance of planning for later life based on a self-reflective question. The quantitative method is used.

Example:

| How important is the planning for later life for me?* | | | | |
|--|---|---|---|---|
| 1 | 2 | 3 | 4 | 5 |
| | | | | |

**Legend:*

- importance: 1- completely irrelevant, 5- completely important

and

Example:

Why is preparation for later life important for me?

| <i>Reason</i> | <i>Selection*</i> |
|-----------------|-------------------|
| <i>Reason 1</i> | |
| <i>Reason 2</i> | X |
| <i>Reason 3</i> | |
| ... | |

*Legend: *several answers are possible*

- Which are my interests?

The individual self-reflects his/her **interests**, asking himself/herself questions such as: What am I interested in? What inspires me? How are my interests related to planning for later life?

The individual writes down his/her answers to the questions asked. Windows for creating answers are being created on the web platform. This is a qualitative methodical approach, so it is necessary for the operation of the platform to create and determine the possibility of analyzing the results by coding.

Example:

| <i>Questions</i> | <i>Text</i> |
|---|-------------|
| <i>What am I interested in?</i> | |
| <i>What inspires me?</i> | |
| <i>How are my interests related to planning for later life?</i> | |

- **My vision of the future**

The individual continues to self-reflect his **vision**². Vision is important for proper goal setting as it provides a broader framework for the future. When creating a vision, an individual asks himself questions such as: What is my vision of old age? What do I need to realize my vision?

The individual writes down his/her answers to the questions asked. Windows for creating answers are being created on the web platform. This is a qualitative methodical approach, so it is necessary for the operation of the platform to create and determine the possibility of analyzing the results by coding.

Example:

| <i>Questions</i> | <i>Text</i> |
|---|-------------|
| <i>What is my vision of old age?</i> | |
| <i>What do I need to realize my vision?</i> | |

- **What are my goals?**

The individual sets some **general goals** for old age. In doing so, he/she is asked the question, What are my general goals for later life?

The individual writes down his/her answers to the questions asked. Windows for creating answers are being created on the web platform. This is a qualitative methodical approach, so it is necessary for the operation of the platform to create and determine the possibility of analyzing the results by coding.

² A vision is a powerful, dynamic representation of what an individual wants in the future. It is an image of the future with roots in the present. The vision is to look ahead, to a feasible, credible, desired positive future, to a state that is better than the present state.

Vision is an act or power of anticipating which will or may come to be. Vision gives direction and a glimpse our life to make our goals and purpose become a reality.

| | |
|--|--|
| <i>Example:</i> | |
| <i>Questions</i> | |
| <i>What are my general goals for later life?</i> | |

After the individual answers the general questions listed above, a presentation of the domains follows. The individual selects the domain he/she wants to work on. The content of each domain is presented with text, images, graphics, videos, etc.

2. Identify

In this step, the individual learns about the selected domain and assesses his/her current condition. The domain is presented to the individual, starting from the starting point in the Guide.

An individual knows some domains well, others not so good. He/she already has experience in some domains and has performed certain activities and practices. He/she has already carried out activities in some domains but was not aware of it. This step will help the individual on which domains he/she still has to work on in the future.

An individual finds out what is characteristic of a domain, what are the key areas, how well he knows and understands it, what is his/her current situation. He/she answers specific questions according to different characteristics, where the quantitative method of evaluation of answers is used.

Questions for self-reflection of the current state of the selected domain should be focused primarily on identifying individual characteristics in relation to the domain and the individual in terms of preparation for later life.

Additional instructions:

The following are instructions for formulating questions and an example of questions with an evaluation scale. The number of questions should be limited to 15 questions due to the scope, traceability of the results, and subsequent analysis of the results. The number of questions should be adjusted according to the scope and needs of the analysis of each domain. If the domain has several subdomains or areas, about 5 questions per individual subdomain are formed (example: selected DOMAIN → 3 SUBDOMAINS → 5 questions per subdomain → (15 final questions within the domain).

In the below example, only a few possible characteristics are presented. If the partner includes any other characteristic or question, he/she chooses the most appropriate rating scale.

Example:

| Characteristic | Question (Example of possible questions) | Measurement scale* | | | | |
|-----------------------------|--|--------------------|---|---|---|---|
| | | 1 | 2 | 3 | 4 | 5 |
| Importance | How important is a domain? | | | | | |
| Knowledge/ Understanding | How well do you know the domain? | | | | | |
| Development | How is the domain developed in your case? | | | | | |
| Satisfaction | What is your satisfaction with the domain? | | | | | |
| Activity | How active are you on the domain? | | | | | |
| Adequacy of resources | What are your current resources in the domain? | | | | | |
| ... | ... | | | | | |
| ... | ... | | | | | |
| ... | ... | | | | | |

**Legend:*

- Importance: 1-completely irrelevant, 5-completely important
- Knowledge / understanding: 1- completely inappropriate, 5-completely appropriate
- Satisfaction: 1-Completely dissatisfied, 5-Completely satisfied
- Development: 1-fully undeveloped, 5-fully developed
- Activity: 1-completely inactive, 5-completely active
- Availability of resources: 1-not at all adequate, 5-completely adequate
- ... (other answer options for the newly added characteristic)

3. Describe

In this step, the individual self-reflects and self-assessed his past, his past experiences, and actions in the chosen domain. In doing so, he/she describes in detail what he/she has already done in a particular domain, in what way, and what the results have been.

He/she answers specific questions according to different characteristics, where the quantitative method of evaluation of answers is used.

Questions for self-reflection of the past of the selected domain should be focused primarily on identifying individual characteristics in relation to the domain and the individual in terms of preparation for later life.

Additional instructions:

The following are instructions for formulating questions and an example of questions with a rating scale. The number of questions should be limited to 10 questions due to the scope, traceability of the results, and subsequent analysis of the results. The number of questions should be adjusted according to the scope and needs of the analysis of each domain. In this case, only a few possible characteristics are presented. If the partner includes any other characteristic or question, he/she chooses the most appropriate rating scale.

When designing characteristics, they should focus on the past experience of the individual in the domain.

Example:

| <i>Characteristic</i> | <i>Question (Example of possible questions)</i> | <i>Measurement scale*</i> | | | | |
|-----------------------|--|---------------------------|----------|----------|----------|----------|
| | | <i>1</i> | <i>2</i> | <i>3</i> | <i>4</i> | <i>5</i> |
| <i>Importance</i> | <i>How important are your past activities to the current state of the domain?</i> | | | | | |
| <i>Importance</i> | <i>How important are your past activities for the future of the domain?</i> | | | | | |
| <i>Satisfaction</i> | <i>How satisfied are you with your past activity in the domain?</i> | | | | | |
| <i>Satisfaction</i> | <i>...</i> | | | | | |
| <i>Activity</i> | <i>How active have you been on the domain in the past?</i> | | | | | |
| <i>Activity</i> | <i>...</i> | | | | | |
| <i>Resources</i> | <i>What has been the availability of your resources on the domain in the past?</i> | | | | | |
| <i>Resources</i> | <i>...</i> | | | | | |
| <i>...</i> | <i>...</i> | | | | | |
| <i>...</i> | <i>...</i> | | | | | |
| <i>...</i> | <i>...</i> | | | | | |

**Legend:*

- *Importance: 1-completely irrelevant, 5-completely relevant*
- *Satisfaction: 1-completely dissatisfied, 5-completely satisfied*
- *Activity: 1-completely inactive, 5-completely active*
- *Availability of resources: 1-completely inadequate, 5-completely adequate*
- *... (other answer options for the newly added characteristic)*

4. Evaluate

In this step, an individual is evaluated based on the results from **steps 2 and 3**. The evaluation of the domain is influenced and determined by both the current situation and past experience. The assessment provides an answer to how strongly the domain develops in the individual. 5 levels are used. The result in each level depends on the average grade of 2. and 3. step. The concrete process of calculating the result will be finalized with the partners after the creation of the domains.

The assessment at five levels is presented below.

Additional instructions:

The following are instructions for creating levels. Each partner detail describes levels from 1 to 5 for their domain. Level 1 means the worst and level 5 the best assessment of the state of development of the domain. The description of each level should be between 500 and 700 characters.

Example:

| Level | Result | Description of the level |
|--------------|---------------|--|
| Level 1 | | <i>Detailed description of the level (importance, development, satisfaction, activities, availability of resources and/or other characteristics) of the domain.</i> |
| Level 2 | | <i>Detailed description of the level (importance, development, satisfaction, activities, availability of resources and/or other characteristics) of the domain.</i> |
| Level 3 | X | <i>Detailed description of the level (importance, development, satisfaction, activities, availability of resources and/or other characteristics) of the domain.</i> |
| Level 4 | | <i>Detailed description of the level (importance, development, satisfaction, activities, availability of resources and/or other characteristics) of the domain.</i> |
| Level 5 | | <i>Detailed description of the level (importance, development, satisfaction, activities, availability of resources and/or other characteristics) of the domain.</i> |

5. Activate

In this step, the basis is the level of assessment from **step 4**, which was formed on the basis of self-reflection of the current situation and past experience.

The individual self-reflects on his/her future-based knowledge and evaluation of the domain. In doing so, it is important to find out what within the domain he/she knows and what he/she can do in the future. This is followed by design and a set of goals, which are the basis for defining and selecting solutions. Finally, he/she draws up an action plan for the future.

For the self-reflection of the future, specific questions are asked, such as:

- **How important is the development of the domain in the future?**

A quantitative method is used to obtain the data.

Additional instructions:

Below is an example of a question for assessing domain in the future. The question is the same for all domains.

Example:

| <i>How important do I think the domain will be in future?*</i> | | | | |
|--|----------|----------|----------|----------|
| <i>1</i> | <i>2</i> | <i>3</i> | <i>4</i> | <i>5</i> |
| | | | | |

**Legend:*

- Importance: 1- completely irrelevant, 5- completely relevant

- **What will be my roles, activities, and resources?**

In order to develop a domain in the future, an individual will have to carry out certain activities and provide himself with the necessary resources. To this end, the individual should assess his/her **role, implementation of activities, and resources** in the future. A quantitative method is used to obtain the data.

Additional instructions:

*The table below shows an example of designing **roles, activities, and resources** in the future. The first three questions are the same for all domains. A partner can add a few more questions when designing their domain, but no more than three.*

Example:

| Statement | Measurement scale* | | | | |
|---|--------------------|---|---|---|---|
| | 1 | 2 | 3 | 4 | 5 |
| <i>In the future, I will need to take an active role in domain development.</i> | | | | | |
| <i>In the future, I will have to perform activities and tasks for domain development.</i> | | | | | |
| <i>In the future, the domain will need adequate resources.</i> | | | | | |
| ... | | | | | |

**Legend:*

- 1-totally disagree, 5-totally agree

Goal setting, action plan, and motivation follow:

- **Goal setting and action plan**

Goals setting and generating an action plan is followed. An individual sets multiple goals for a domain. The design and setting of goals should be based on the SMART method of goal setting. Once the goals have been set, an action plan is developed, which includes:

- Selection of activities and tasks (What?)
- Performers of activities and tasks (Who?)
- Task timing (When?)
- Necessary resources to achieve the goal (What is needed?)

An individual can choose several activities/tasks, several performers (most often it will be himself), and several resources. Each activity must be limited in time. A quantitative method is used to set goals and create an action plan.

Additional instructions:

Each partner anticipates an appropriate number of goals and anticipates possible activities/tasks, performers, time, and resources for each goal created. The table below shows an example for designing goals, activities, performers, time, and resources.

Example:

Goal setting and action plan

| <i>Goal</i> | <i>Activity</i> | <i>Performer</i> | <i>Time</i> | <i>Resource</i> |
|---------------|-------------------|--------------------|--------------------------|-------------------|
| <i>Goal 1</i> | <i>Activity 1</i> | <i>Performer 1</i> | <i>Time definition 1</i> | <i>Resource 1</i> |
| | <i>Activity 2</i> | <i>Performer 2</i> | <i>Time definition 2</i> | <i>Resource 2</i> |
| | <i>Activity 3</i> | <i>Performer 3</i> | <i>Time definition 3</i> | <i>Resource 3</i> |
| | ... | ... | ... | ... |
| <i>Goal 2</i> | <i>Activity 1</i> | <i>Performer 1</i> | <i>Time definition 1</i> | <i>Resource 1</i> |
| | <i>Activity 2</i> | <i>Performer 2</i> | <i>Time definition 2</i> | <i>Resource 2</i> |
| | <i>Activity 3</i> | <i>Performer 3</i> | <i>Time definition 3</i> | <i>Resource 3</i> |
| | ... | ... | ... | ... |
| <i>Goal 3</i> | <i>Activity 1</i> | <i>Performer 1</i> | <i>Time definition 1</i> | <i>Resource 1</i> |
| | <i>Activity 2</i> | <i>Performer 2</i> | <i>Time definition 2</i> | <i>Resource 2</i> |
| | <i>Activity 3</i> | <i>Performer 3</i> | <i>Time definition 3</i> | <i>Resource 3</i> |
| | ... | ... | ... | ... |
| ... | ... | ... | ... | ... |

- Motivation

For successful achievement of the goal and the fulfillment of the action plan, the motivation that encourages and empowers the individual for lifelong self-reflection and self-assessment is also important. Motivation should gradually change from external to internal motivation. *A quantitative method is used to design motivational factors.*

Additional instructions:

For each set goal, one or more motivational incentives in the form of motivational statements should be provided. Each partner sets one or more incentives for the set goal.

Example:

Encouraging motivation for preparation and planning for later life

| <i>Goal</i> | <i>Motivation</i> |
|---------------|--------------------|
| <i>Goal 1</i> | <i>Incentive 1</i> |
| | <i>Incentive 2</i> |
| | ... |
| <i>Goal 2</i> | <i>Incentive 1</i> |
| | <i>Incentive 2</i> |
| | ... |
| <i>Goal 3</i> | <i>Incentive 1</i> |
| | <i>Incentive 2</i> |
| | ... |
| ... | ... |

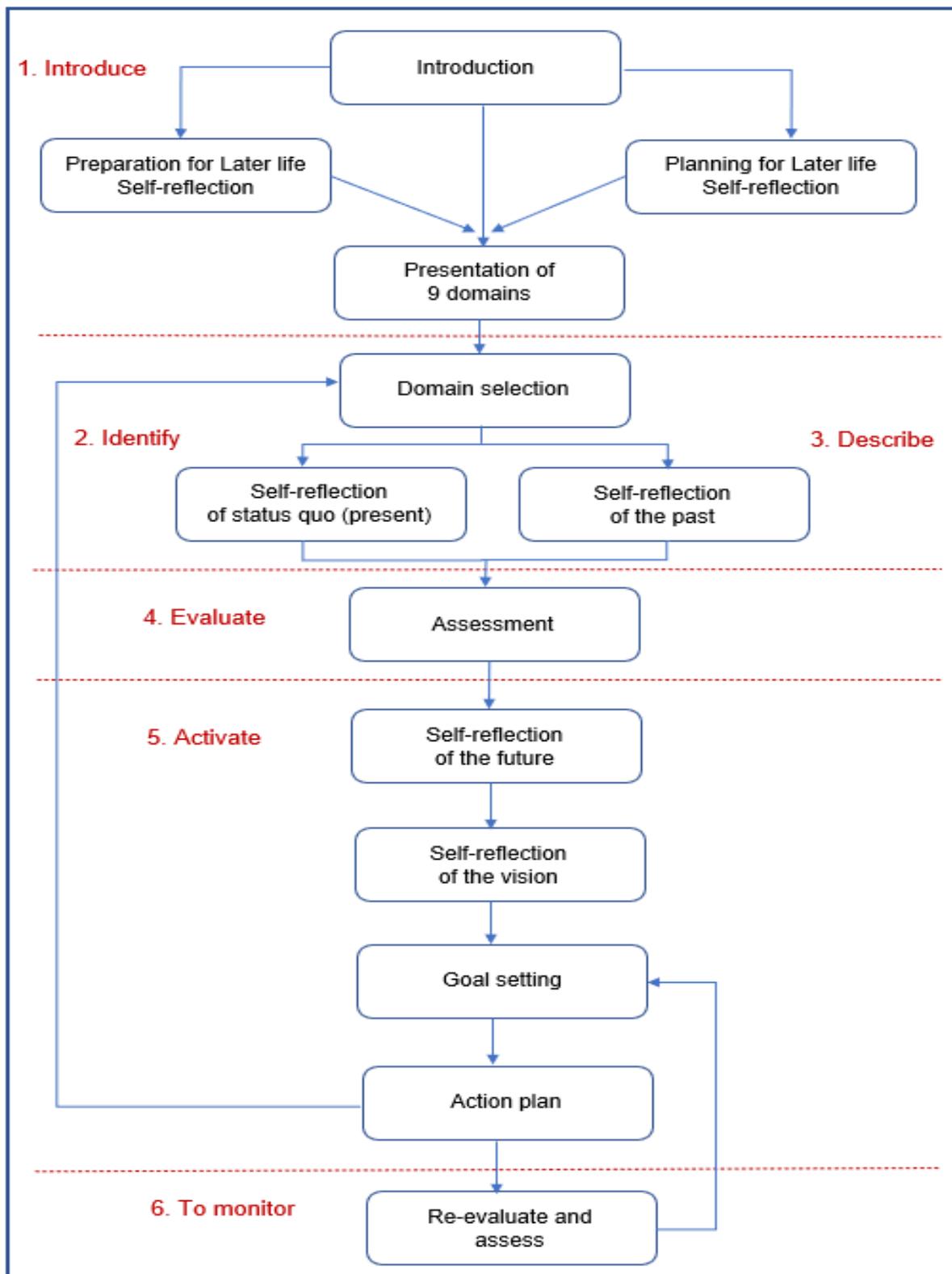
6. To monitor

In order to achieve the set goals, it is important to check their realization when it is necessary to constantly re-evaluate and assess the progress. It takes constant maintenance of strong motivation. The closer the goal is, the stronger the motivation to reach the goal will be.

In this step, adjustments to the goals and action plan are made if the goals are not fully achieved. In some cases, individuals will need to go back to step 2 and start again.

3.2. Conceptual model

Based on the described concept, we designed a conceptual model, which is presented in the figure below.



4. Summary

In sum, the document describes the development of an assessment tool – framework. The concept is designed for a self-reflection based on questions and self-assessment. Self-reflection is a method of inner dialog, question-driven thinking about oneself, their characteristics, state, goals, and lead to self-assessment. Self-reflection enables an analysis of the status-quo, past, and reflection on the future and possible conclusions for individual action plans.

An assessment tool is prepared in the document, which gives the framework for self-reflection and self-assessment on the online platform (www.senquality.eu), but the methodology can also be used by experts when they offer support to persons in situations of change.

The concept is based on self-reflection, in which the individual uses questions to analyze and self-assess his current situation, past experiences and actions, and this leads him to think about the future.

Based on self-reflection and self-assessment, the person performs an evaluation according to the set levels. This is followed by self-reflection of the future, setting goals, defining and choosing solutions. Finally, an action plan for the future is drawn up.

The concept of assessment of preparation and planning of later life includes 5 steps:

1. **Introduce** is a step in which the individual learns the general importance of preparation for later life, planning for later life and get acquainted with domains.
2. **Identify** is the step in which individual learns about the selected domain and assesses his/her current condition. An individual finds out what is characteristic of a domain, what are the key areas, how well he knows and understands it, what is his/her current situation. He/she answers specific questions according to different characteristics.
3. **Describe** is a step in which the individual self-reflects and self-assessed his past, his past experiences, and actions in the chosen domain. Individual describe in detail what has already been done in a particular domain, in what way, and what the results have been.
4. **Evaluate** is the step in which an individual is evaluated based on the results from steps 2 and 3. The evaluation of the domain is influenced and determined by both the current situation and past experience. The assessment provides an answer to how strongly the domain developes in the individual. 5 levels are used.
5. **Activate** is the step in which individual self-reflects on his/her future-based knowledge and evaluation of the domain. In doing so, it is important to find out what within the domain he/she knows and what he/she can do in the future. This is followed by design and a set of goals, which are the basis for defining and selecting solutions. Finally, he/she draws up an action plan for the future.
6. **To monitor** is the last step in which adjustments to the goals and action plan are made if the goals are not fully achieved. In some cases, individuals will need to go back to step 2 and start again.

Based on the framework all partners will deliver proposals and content for their domains. Self-reflection will be stimulated with domain-specific questions and scenarios that lead to increased awareness, but also a concrete action plan for later life.

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