

# The Middle-Way Method

## Toolkit Part Two



*A practical workbook for aligned, flexible, and grounded living*

Designed to help you reflect, reset, and move forward—without burnout.



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# Welcome to the Middle-Way Method

The Middle-Way Method is a simple, flexible approach to planning that emphasizes balance, clarity, and sustainable progress. Designed to help you align your actions with your values and priorities, it offers a clear, actionable framework to keep you on track while staying adaptable to life's changes.

Whether you're seeking personal growth, productivity, or a better way to organize your life, the Middle-Way Method helps you:

Focus on what truly matters

Create sustainable routines

Stay grounded and flexible

Reconnect with your deeper values

This toolkit is designed to help you reflect, reset, and make progress in a way that feels good—without the pressure of perfect execution. Use it as a guide to help you stay on course, adapt your goals, and move forward with clarity and purpose.

The toolkit includes a series of simple worksheets, each grounded in one of the method's key principles. They're designed to work with your natural rhythms—seasonally, weekly, or whenever you feel stuck or ready to reset.

## Focus of This Toolkit:

Toolkit 2 builds on the foundations of Toolkit 1, which gave you an introduction to the Middle-Way Method. In this toolkit, we'll go deeper into the first part of the method: understanding your motivations and creating a personal mission and vision statement.

We'll guide you through a reflective process to uncover your core values, explore your roles and relationships, and ultimately craft a mission and vision statement that serves as a guiding compass for your life. By the end of this toolkit, you'll have a clearer understanding of what drives you and how to use that clarity to define your purpose—leading you toward more intentional and fulfilling actions.



# Values Inventory

## What Matters Most to You?

Below is a list of values to help you reflect. Circle or highlight the 8–10 that resonate most with who you are and who you want to become. Feel free to add your own.

### Sample Values:

- |   |   |  |
|---|---|--|
| <input type="checkbox"/> Accomplishment | <input type="checkbox"/> Creativity         | <input type="checkbox"/> Loyalty           |
| <input type="checkbox"/> Adventure      | <input type="checkbox"/> Curiosity          | <input type="checkbox"/> Make a Difference |
| <input type="checkbox"/> Authenticity   | <input type="checkbox"/> Dignity            | <input type="checkbox"/> Openness          |
| <input type="checkbox"/> Balance        | <input type="checkbox"/> Excellence         | <input type="checkbox"/> Passion           |
| <input type="checkbox"/> Beauty         | <input type="checkbox"/> Faith              | <input type="checkbox"/> Personal Growth   |
| <input type="checkbox"/> Belonging      | <input type="checkbox"/> Family             | <input type="checkbox"/> Power             |
| <input type="checkbox"/> Challenge      | <input type="checkbox"/> Financial Security | <input type="checkbox"/> Respect           |
| <input type="checkbox"/> Community      | <input type="checkbox"/> Forgiveness        | <input type="checkbox"/> Responsibility    |
| <input type="checkbox"/> Compassion     | <input type="checkbox"/> Freedom            | <input type="checkbox"/> Security          |
| <input type="checkbox"/> Connection     | <input type="checkbox"/> Fun                | <input type="checkbox"/> Self-Respect      |

### My Values:

Pick 3 to 10 Values from the list and write them below. Then define what they mean to you.

1.

2.

3.

4.

5.

6.

7.

8.

9.

10



# Roles in Your Life

## Instructions:

- 1) Instructions:
- 2) List your major life roles (3–8 roles is typical).
- 3) Briefly describe what that role involves.
- 4) Rate each role's alignment with your core values (1 = low, 5 = high).
- 5) Indicate whether you want to focus more intentionally on this role right now.

Role Name	Description/ Responsibilities	Alignment with Values (1 - 5)	Priority / Focus (Yes / No)



# Key Relationships Map

## Instructions

1. List important relationships from your personal, professional, and social life.
2. Identify the role each person plays (e.g., friend, spouse, manager).
3. Reflect on your current connection — rate or describe how strong and healthy it feels.
4. Match each relationship to a personal value it supports, challenges, or calls into focus.
5. Note what's working well in the relationship — what you appreciate or want to continue.
6. Highlight areas that need attention — what could improve, repair, or deepen the bond.
7. Review the full map to see patterns, unmet needs, and opportunities for growth or gratitude.

Person	Role	Current Connection	Related Values	What's Working	Needs Attention



# Retirement Party Visualization

## Instructions

1. Imagine a major milestone gathering (e.g., retirement party, milestone birthday, memorial).
2. Picture key people from each area of your life attending:
  - ✿ Family
  - ✿ Friends
  - ✿ Colleagues
  - ✿ Community members
3. Choose 3–4 representative individuals (by name or role).
4. For each, write what you hope they would say about your character, values, and impact.
5. Reflect on what actions or changes could help bring that vision closer to reality.

Relationship/Role:

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Relationship/Role:

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Relationship/Role:

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# Key Relationships Map, Continued

Relationship/Role:

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Relationship/Role:

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Relationship/Role:

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Relationship/Role:

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# Your Inner Compass, Summary

## My Values

Summarize your key values.

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## Key Roles

Summarize your key roles..

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## Important Relationships

Summarize your important relationships.

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## Vision Statement

Write a few words about the direction you would like to take in life.

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# Discovering Your Mission

Your mission reflects what matters most to you right now — the values you want to live by, and the way you want to show up for your roles and commitments. Use the prompts below to reflect before writing your statement.

**What values are guiding you?**

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**Where in your life do you want to show up?**

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**What roles or relationships matter most to you right now?**

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**What kind of difference do you want to make?**

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[illegible]



# Imagining Your Future Self

Your vision statement reflects the kind of person you're growing into — the future self you're becoming. Use these prompts to explore what that looks and feels like.

**What do you imagine your life looking like 5–10 years from now?**

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**How do you want to feel in your relationships, and work?**

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**What kind of impact or legacy would feel meaningful to you?**

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**What traits, habits, or qualities will you have by then?**

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This image shows a full page of white paper with horizontal grey ruling lines. The lines are evenly spaced and run across the width of the page, providing a template for handwriting practice or general writing. There are no margins, text, or other markings on the page.



# Mission and Vision Alignment Map

Have your Mission and Vision Statements Ready for reference.

## Your Current Project or Goal

A short description of the project you want to assess.

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## How Does This Project Support Your Mission?

Think about how it connects with your core purpose.

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## How Does This Project Reflect or Advance Your Vision?

What long-term change or contribution does it support?

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## What Needs Adjustment to Align More Fully?

What can be re-scoped, dropped, or refocused to better match your mission and vision?

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# Mission and Vision Alignment Map

Have your Mission and Vision Statements Ready for reference.

Goals / Projects	Impact Alignment	Mission Alignment
	<input type="checkbox"/> High <input type="checkbox"/> Med <input type="checkbox"/> Low	<input type="checkbox"/> High <input type="checkbox"/> Med <input type="checkbox"/> Low
	<input type="checkbox"/> High <input type="checkbox"/> Med <input type="checkbox"/> Low	<input type="checkbox"/> High <input type="checkbox"/> Med <input type="checkbox"/> Low
	<input type="checkbox"/> High <input type="checkbox"/> Med <input type="checkbox"/> Low	<input type="checkbox"/> High <input type="checkbox"/> Med <input type="checkbox"/> Low
	<input type="checkbox"/> High <input type="checkbox"/> Med <input type="checkbox"/> Low	<input type="checkbox"/> High <input type="checkbox"/> Med <input type="checkbox"/> Low
	<input type="checkbox"/> High <input type="checkbox"/> Med <input type="checkbox"/> Low	<input type="checkbox"/> High <input type="checkbox"/> Med <input type="checkbox"/> Low
	<input type="checkbox"/> High <input type="checkbox"/> Med <input type="checkbox"/> Low	<input type="checkbox"/> High <input type="checkbox"/> Med <input type="checkbox"/> Low
	<input type="checkbox"/> High <input type="checkbox"/> Med <input type="checkbox"/> Low	<input type="checkbox"/> High <input type="checkbox"/> Med <input type="checkbox"/> Low
	<input type="checkbox"/> High <input type="checkbox"/> Med <input type="checkbox"/> Low	<input type="checkbox"/> High <input type="checkbox"/> Med <input type="checkbox"/> Low
	<input type="checkbox"/> High <input type="checkbox"/> Med <input type="checkbox"/> Low	<input type="checkbox"/> High <input type="checkbox"/> Med <input type="checkbox"/> Low

**Which projects feel most aligned and urgent?**

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**What's one action you'll take this week to focus on your purpose?**

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# Mind Dump

**Free your thoughts. Clear your mind.**

Write down anything that's on your mind — tasks, worries, ideas, or reminders.  
No order, no pressure — just get it all out so you can breathe.





# Priority Matrix

Decide what matters. Act with clarity.

Sort your tasks into the four quadrants below to see what needs your attention now, what can wait, what to delegate, and what to drop.

**Urgent**

**Not Urgent**

**Important**

**Not Important**





# Daily Review

Check in. Realign. Keep the day grounded in awareness.

## Start with Awareness

- ✧ Take a breath.
- ✧ Reflect on your current state — physically, mentally, emotionally.
- ✧ Do a quick scan: What needs your attention right now?

## Reflect on the Day So Far (or the Day Before)

- ✧ What went well?
- ✧ What was difficult or distracting?
- ✧ What helped you stay centered or effective?

## Refocus on What Matters

- ✧ Reconnect with your mission and priorities.
- ✧ Are your tasks aligned with your deeper goals?

## Rebalance

- ✧ Is anything out of proportion — energy, time, attention?
- ✧ Do you need to slow down, simplify, or shift your focus?

## Close with Intention

- ✧ What's the next small, meaningful step?
- ✧ What do you want to carry forward into tomorrow?



# Weekly Review

Reflect and realign with your mission before moving forward.

## Reconnect with Purpose

- ✧ Reread your Mission Statement and Vision Statement.
- ✧ Let them guide your thinking as you reflect on the past week.

## Reflect on the Week

Ask yourself:

- ✧ What did I accomplish this week?
- ✧ What obstacles came up, and how did I respond or adapt?

## Refocus on Relationships and Roles

- ✧ Which roles or relationships need your attention in the upcoming week?
- ✧ Are any being neglected or overly prioritized?

## Align with Goals and Projects

- ✧ Review current goals and active projects.
- ✧ What's the next small step for each one?

## Plan Forward

- ✧ Turn those steps into clear, actionable tasks for the week ahead.
- ✧ Prioritize tasks that support your broader goals.



# Yearly Review

Zoom out. Honor the arc. Prepare the ground for what's next.

## Reconnect with the Bigger Picture

- \* Revisit your Mission and Vision Statements.
- \* How have your values or priorities evolved?

## Reflect on the Past Year

- \* What were your key accomplishments and meaningful moments?
- \* What challenges shaped your growth or direction?
- \* Where did you spend most of your time, energy, or focus?

## Assess Your Life Domains

- \* Consider areas like health, work, creativity, relationships, spirituality, and rest.
- \* Which areas flourished? Which were neglected?

## Realign Goals and Projects

- \* Which goals did you meet, revise, or release?
- \* Which projects still matter going forward?

## Clarify What's Next

- \* What themes or intentions will guide the new year?
- \* What do you want to cultivate, let go of, or explore?