PEM
Personal Excellence Map
Interpretation and Intervention Guide

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The Personal Excellence Map (PEM)© Interpretation and Intervention Guide is intended as a facilitator’s manual for the PEM© assessment. The PEM© Guide briefly discusses the education and transformative theory of emotional intelligence (EI) (Nelson & Low, 2003), the EI-centric construct of personal excellence (Nelson & Low, 2003; Hammett, 2007), applications of the instrument, evidence of instrument reliability and validity, and suggested areas for future research. The PEM© Guide is best viewed as a “work in progress.” It will be updated as new PEM© research is completed and becomes available.

EMOTIONAL INTELLIGENCE

The education and transformative theory of EI defines emotional intelligence succinctly as the learned ability to think constructively and act wisely. As a learned ability, EI is a confluence of developed skills that facilitate (a) accurately knowing yourself in terms of personal strengths and weaknesses, (b) establishing and maintaining a variety of effective and healthy relationships, (c) getting along and working productively with others, and (d) dealing effectively and healthily with the demands and pressures of daily work and life. EI requires specific skills to harmonize the cognitive and experiential minds that contribute to effective behavior. It is a continuous and life-long process of developing and applying specific skills. The PEM© is one of several tools distributed by EI Learning Systems, Inc. for helping to develop students, clients, and self.

One of the distinctive contributions of the transformative theory of EI is the inclusion of a cognitive structure (see Figure 1) to facilitate what Maslow (1999) called a healthy intrapersonal psychology. The Emotional Learning System (ELS) is a systematic step-by-step process that encourages a harmonizing of the rational and emotional minds to achieve balance and guide behavioral choices based on a learned habit of reflection and experience (Nelson & Low, 2003). Emotional learning is experiential and takes time, even when guided by purposeful activities to achieve that goal. When combined with the ELS, the PEM© facilitates a habit of integrating the rational and emotional minds to inner-direct critical skill development that leads to healthier relationships, better self-management, higher congruence, increased goal directedness, self-renewal, and higher quality work and achievement. Combined, they facilitate personal excellence (Nelson & Low, 2003).

Figure 1. The Emotional Learning System©
PERSONAL EXCELLENCE AND THE PEM©

Personal excellence is the life-long process of developing specific emotional skills that lead to increasing levels of intelligent self-direction. It is a process of becoming the best person one can be and is reflected in how one is, as well as what one does. Personal excellence is indicated in people who develop their gifts and talents to the fullest, achieving a harmony in how they think, feel, behave, and believe that leads to productive relationships and outcomes. Rather than an arrival state, personal excellence is a journey of positive development beyond one’s self. It manifests in self-defined and self-valued achievements that reflect one’s best efforts. The EI-centric theory of personal excellence connects the process of building quality from within with the lived experience of each individual.

The PEM© stands on 30 years of research into how human cognition and emotion impact individual growth and performance (Nelson, Low, & Vela, 2003). The development of the emotional intelligence theory of Darwin Nelson, Ph.D. and Gary Low, Ph.D. began with their first assessment instrument, the Personal Skills Map (PSM), thirty years ago (Nelson & Low, 1979). Since its inception, the PSM has been translated into many languages and used worldwide by human science researchers, educators, consultants, managers, and other leaders to improve the effectiveness of students, teachers, corporate leaders, and others (Bailey & Hammert, 2006). In 1998, after twenty years of scholarly inquiry and research, Nelson and Low published their first assessment of emotional intelligence, the Emotional Skills Assessment Process (ESAP) (Nelson & Low, 1998). Therefore, although a relatively new instrument and theory, personal excellence and the education and transformative model of emotional intelligence provide a synthesis and extension of the life-long work and research of its primary authors, Nelson and Low.

Factor analysis research (Hammert, 2007) using the original 150-item Personal Excellence Inventory (PEI) (Nelson & Low, 2003) suggested a new 83-item instrument, the PEM©. The PEM© measures the original five composite scales of the PEI, along 15 specific skill areas. The instrument uses a five item Likert response format that includes N=0 for “Never like or descriptive of me,” R=1 for “Rarely like or descriptive of me,” S=2 for “Sometimes like or descriptive of me,” U=3 for “Usually like or descriptive of me,” and A=4 for “Always like or descriptive of me”. Three items directing specific answers were added to detect patterned responding, two items were added to the Self-Appreciation measure to better define the scale, and five items were added from the ESAP measure of leadership to form the fifteenth and final skill assessed by the PEM©.

In Goleman’s (1995) seminal publication of Emotional Intelligence, he seemed to adopt Salovey and Mayer’s (1990) five domains of EI. The five domains included Self-Awareness, Self-Control, Recognizing Emotions in Others, Handling Relationships, and Motivating Oneself. During their 30-year history of research into personal skills and achievement, Nelson and Low have repeatedly found similar domains. However, where others seem to ignore the relationship between EI and motivation, Nelson and Low have embraced it. In our education and transformative approach of EI, motivation is both influenced by and acts upon the other four domains. The integration of the emotional and cognitive minds to conform goal-directed behavior to reflected felt

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Figure 2. The PEM and Goleman’s Five Domains of Emotional Intelligence

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needs is a critical aspect of emotional intelligence. The confluence and interactions of the PEM© composite scales and underlying skills, as well as their theoretical connections with the five EI domains, are shown in Figure 2.

The original PEI (Nelson & Low, 2003) referred to composite scales as “systems” and “principles” of personal excellence, rather than competencies. The same naming convention was retained for the PEM©. The five composite scales and fourteen skill measures found through factor analysis, as well as the ESAP adapted measure of leadership (positive influence), are provided below along with their research-derived definitions.

1. The belief system is concerned with the purpose principle and functions primarily to define our levels of achievement and excellence. Our belief system influences our view about what we are capable of achieving. The core belief is that we have positive value as a person. The key skills within this system are self-esteem, congruence, self-appreciation, and self-confidence.

   A. Self-Esteem: The learned ability to view self as positive, competent, and successful in achieving personal goals.
   B. Congruence: The learned ability to clarify important personal values related to goals and beliefs, as well as align behaviors and choices in a self-developing way.
   C. Self-Appreciation: The learned ability to value yourself positively and to be in touch with your strengths as a person.
   D. Self-Confidence: The learned ability to focus on competence and feel positive about your potential to perform effectively.

2. The support system is concerned with the relationships principle and functions to build and provide support with others. Positive support from others and cooperative interpersonal relationships foster high levels of personal achievement. Key skills within the support system are assertion, teambuilding, and empathy. Five items from the positive influence or personal leadership scale of the ESAP were added to the PEM© so the leadership skill could be directly assessed and discussed in training.

   A. Assertion: The learned ability to communicate your needs and wants to others in a direct and honest manner.
   B. Teambuilding: The learned ability to add synergy and contribute constructively in cohort activities.
   C. Empathy: The learned ability to accurately understand the thoughts and feelings of others.
   D. Leadership: The learned ability to affect positive influence in others.

3. The guidance system is concerned with the personal vision principle and intelligent self-direction. A unique human quality is the ability to consider the future and to formulate goals that influence our present behavior. Key skills within this system are personal orientation, goal setting, and self-control.

   A. Personal Orientation: The learned ability to see oneself as a positive person with potential to continually learn and change.
   B. Goal Setting: The learned ability to set clear and specific personal goals. Achievable goals provide focus for personal motivation.
   C. Self-Control: The learned ability to exercise choice and control over the strength of your emotional responses. An essential skill to high achievement and to keep us focused on our goals.
4. The balance system is concerned with the change principle and it functions to maintain balance in our achievement and consistency in our performance and lives. A major function of the balance system is to positively manage change in the present. Key skills within this system are decision making and stress management.

A. **Decision Making**: The learned ability to make good choices while being decisive.
B. **Stress Management**: The learned ability to positively manage stress while keeping yourself physically and emotionally healthy.

5. The power system is concerned with the commitment principle and it serves to supply direct energy for goal achievement. Motivation is internal, and committed, focused energy leads to high levels of personal achievement and excellence. Key skills within this system are drive strength and self-management.

A. **Drive Strength**: The learned ability to persist and accomplish goals that are meaningful and satisfying.
B. **Self-Management**: The learned ability to manage your life and responsibilities proactively.

**APPLICATIONS AND USE OF THE PERSONAL EXCELLENCE MAP**

While some people immediately see the value of studying and developing EI, others seem almost naturally averse and may experience dissonance when presented the construct emotional intelligence. The latter may tend to attribute such skills and abilities to other domains, such as general intelligence (Locke, 2005), just “plain old common sense,” or something mystical that cannot be taught. For these people, the PEM© and the EI centric theory of personal excellence are meant to provide a reframing opportunity, the possibility of seeing the ELS model and transformative EI theory in a more positive and constructive light. As suggested in the closing chapter of their book *Emotional Intelligence: Achieving Academic and Career Excellence* (Nelson & Low, 2003), as one works to develop more effective emotional intelligence skills using the emotional learning system, the ultimate goal is self-renewal and personal excellence.

Some applications for the PEM© are outlined as follows:

- As noted above, when used alone the PEM© may have value in reframing and extending the education and transformative theory of EI for clients and students who possess inaccurate perceptions of the processes or lack appreciation of the benefits of affective education and development.

- When combined with previous opportunities for affective learning provided by the ESAP, the PEM© extends the experiential learning processes that are so important for the continued development of EI skills, constructive thinking, and intelligent self-direction.

- The PEM© is well suited for developing transformational leadership skills in individuals, and transformational leadership qualities and values in organizations (Hammett, 2008).

- When delivered prior to the Relationship Skills Map (RSM) (Nelson & Nelson) and after the ESAP, the PEM© extends EI centric learning and paves the way for developing healthier relationships between specific individuals.

- Finally, total personal excellence in individuals is significantly related to job satisfaction, which is an important criterion for workforce stability and climate. Organizational training
and education programs designed around the PEM© teach personal excellence skills, increase job and life satisfaction, and reduce employee turnover.

Experiencing the PEM© and learning about EI should be a positive learning experience for students and clients. This means that facilitators must spend some time building rapport and trust prior to administering the instrument. The amount of time spent building rapport will vary by situation and for instrument administration, is probably less critical than the simple communication of its importance.

The development of EI is a person-centered process. Facilitators must acknowledge and respect the knowledge and lived experiences that learners bring to the assessment, learning, and reflecting processes. Since the transformative theory of EI views assessment as a reflection of how the individual currently processes emotional information, there truly are no right or wrong answers in positive assessment. Rather, honest answers produce the most relevant Personal Excellence Profile, Personal Excellence Map, and Continuum of Personal Excellence to help the respondent explore his or her own effectiveness. The purpose is to identify areas of personal affective strength, as well as opportunities for personal affective growth and development.

To assist facilitators in administering the PEM© and to increase the reliability of the instrument, a standardized instruction sheet is provided in Appendix A. The PEM© assessment and EI learning should be positive, person-centered, and formative, and not summative in any fashion. When used with students and clients, facilitators, trainers, and educators are encouraged to emphasize the positive aspects of the theory, processes, and learning.

**PEM© READABILITY, VALIDITY, AND RELIABILITY**

Hammett (2007) reported norming and validation statistics based on samples of professional clergy and seminarians (n = 168) and EI conference participants (n = 64). Normative statistics based on this population are provided in Appendix B. In addition, readability statistics were computed using MS Word 2004, which computes both reading ease and reading grade level. According to the software’s reference manual, the Flesch Reading Ease for standard documents is recommended at 60-70, with higher numbers indicating documents that are easier to understand. The PEM© returned a Flesch Reading Ease score of 62.2. The Flesch-Kincaid grade level score reflects the U.S. grade reading level. The PEM© returned a Flesch-Kincaid grade reading level score of 7.3. Grade reading level scores that range between 7.0–8.0 are recommended for most standard documents.

The PEM© was initially validated using correlations of the total PEM© score with selected items assessing the level of career satisfaction and achievement of the UMC sample. Although personal excellence was not related to level of income or level of education, it was positively and significantly related to career satisfaction on several dimensions. As noted by Vandervoot (2006), career satisfaction is related negatively with psychosomatic health problems; especially depression and anxiety, and positively related to physical health. If career satisfaction is positively related to both personal excellence (Hammett, 2007) and health (Vandervoot), then it follows that training and education programs to develop personal excellence should increase both career satisfaction and employee health, as well as reduce healthcare related costs. It may also improve productivity and leadership, keep the most productive workers from leaving their jobs, and improve the overall culture and climate of organizations (Hammett). Validation hypotheses of total PEM and career satisfaction are provided as follows:

- Total personal excellence was significantly related to satisfaction with meeting overall career goals (N=165, r_s = .42, p = .000).
- Total personal excellence was significantly related to satisfaction with career success (N=161, r_s = .34, p = .000).
• Total personal excellence was significantly related to satisfaction with meeting goals for income ($N=165, r_s = .27, p = .000$).

• Total personal excellence was significantly related to satisfaction with goals for developing career skills ($N=165, r_s = .49, p = .000$).

• Total personal excellence was significantly related to satisfaction with career for meeting existential needs, such as deepening one’s spirituality ($N=166, r_s = .34, p = .000$).

• Total personal excellence was significantly related to satisfaction with career for meeting existential needs, such following one’s true calling ($N=166, r_s = .32, p = .000$).

• Total personal excellence was significantly related to satisfaction with career for meeting existential needs, such as congruence and support of religious values ($N=166, r_s = .34, p = .000$).

• Total personal excellence was not related to level of income ($N=160, r_s = .01, p = .93$) or level of education ($N=168, r_s = .02, p = .80$).

The parametric and non-parametric internal consistency estimates of reliability for the factored skills are provided in Table 1. Although the 5-item positive influence scale adapted for the PEM© from the ESAP has yet to be evaluated, the 12-item scale from whence it came demonstrated internal consistency of .82 (Nelson, Low, Vela, 2004). In addition, to increase its reliability two new items were created and added to the self-appreciation scale and that scale remains to be evaluated psychometrically in its current configuration. In an effort to detect patterned responding three items were added directing the participant to skip over the item. When combined with the sufficient reliability coefficients found for the 14 individual scales, the total reliability coefficient of .97 provides strong evidence that the PEM© is a reliable measure when used with professionals and adult participants.

Finally, the statistically significant correlations between the composite scales provided additional evidence, above and beyond the factor analysis, to indicate the measure of a similar underlying construct (Parolini, 2005). The subscale correlations ranged from $r = .70$ ($N = 232, p < .01$) for Change/Balance and Commitment/Power to $r = .85$ ($N = 232, p < .01$) for Vision/Guidance and Commitment/Power. Since Nelson and Low (2003) proposed the a priori theory of Personal Excellence to extend the development of Emotional Intelligence for life-long learning, it is also reasonable to conclude that the PEM© measures a general underlying factor of EI as defined by the authors.

| Table 1 | Internal Reliability of the PEM© Item Scales ($N = 232$) |
|---|---|---|
| Intermediate Scales | Spearman-Brown Split-Half Correlation Coefficients | Cronbach’s Coefficient Alpha |
| Self-Esteem | .86 | .85 |
| Congruence | .76 | .78 |
| Self-Appreciation | .63 | .63 |
| Self-Confidence | .82 | .85 |

(Table 1 continues)
RESEARCH DIRECTIONS

Follow-on research is needed to further define and develop the construct of personal excellence. Research that takes a confirmatory perspective using structural equation modeling and other factor analytic procedures will provide validation studies of the personal excellence construct and scales.

Based on the positive correlations of the PEM© with specific career satisfaction items, research is needed to determine the value in predicting certain facets of career satisfaction and achievement. Research designs incorporating regression models would also be useful in determining the extent to which the PEM© is capable of predicting other areas of socially and personally valued outcomes.

Tang (2007) found that certain skills of EI as measured using the ESAP© were significantly correlated with transformational leadership. Hammett (2008) suggested that the PEM© is linearly related to transformational leadership and visioning. A correlational study to investigate the relationship between PEM© skills and transformational or other developmental approaches to leadership would provide additional validation of the EI-centric theory of personal excellence.

Research is needed to evaluate the test-retest reliability of the instrument. Although the PEM© demonstrated internal reliability with the adult samples (Hammett, 2007), it may perform differently, especially with adolescent or young adult participants. The PEM© should be studied systematically with people of different ages, cultures, and expected performance outcomes. For example, for validity purposes, it would be useful to compare the performance of individuals who are incarcerated for crimes with those of counselors and psychotherapists (Schutte, et. al, 1998).

Hammett (2007) found that the PEM© measures an underlying general factor of EI as defined by Nelson and Low (2003). A correlational study with another of Nelson and Low’s instruments, such as the ESAP, may provide additional evidence of the PEM’s content validity and further support the conclusion that it assesses a general factor of EI as defined by Nelson and Low.

<table>
<thead>
<tr>
<th>Intermediate Scales</th>
<th>Spearman-Brown Split-Half Correlation Coefficients</th>
<th>Cronbach’s Coefficient Alpha</th>
</tr>
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<tr>
<td>Assertion</td>
<td>.74</td>
<td>.79</td>
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<tr>
<td>Team Building</td>
<td>.76</td>
<td>.77</td>
</tr>
<tr>
<td>Empathy</td>
<td>.88</td>
<td>.83</td>
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<tr>
<td>Personal Orientation</td>
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<td>Self-Control</td>
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<td>Goal Setting</td>
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<td>.84</td>
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<tr>
<td>Drive Strength</td>
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<td>.83</td>
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<tr>
<td>Self-Management</td>
<td>.80</td>
<td>.84</td>
</tr>
<tr>
<td>Decision Making</td>
<td>.91</td>
<td>.90</td>
</tr>
<tr>
<td>Stress Management</td>
<td>.81</td>
<td>.84</td>
</tr>
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</table>
The PEM© would benefit as well from validity research with other instruments. A good candidate for demonstrating divergent validity would be the IQ test. The EI construct, regardless of how it is defined, is consistently described in the literature as something different from IQ. Therefore, the PEM© should not be correlated with IQ.

Candidate instruments for demonstrating convergent validity include Epstein’s (1998) measure of constructive thinking, as well as other instruments that assess generally healthy mental functioning, such as the 16PF (Knapp, 1976).

Maslow’s (1954) self-actualizing construct would provide an interesting concurrent approach for studying the PEM©. As conceptualized by Shostrom (1966), it remains to be seen whether the Personal Orientation Inventory (POI) would be related in positive, negative, or mixed ways. If the POI is primarily a self-centric measure of personal functioning, then such a study might show that EI, as defined by Nelson and Low (2003), presents an alternative humanistic approach.

Additional research is needed to investigate the relationship between specific personal excellence competencies and objective measures of success. Especially in a global economy, it seems an ethos of personal excellence would be important for developing and sustaining good business relationships and healthy cultures. A related research question might be: “What characteristics or themes are shared by people who show both high levels of objective success and personal excellence?”
REFERENCES


Appendix A

Instructions for Administering the Personal Excellence Map
Instructions for Completing the PEM©
(Personal Excellence Map)

Background

Board certified psychologists and educators from Texas A&M University in Kingsville, Texas developed the PEM©. First published in 2007, the PEM© is the culmination of 30 years of education research into individual happiness, achievement, and motivation. Its purpose is to help people learn more about themselves in order to become more effective and more integrated in their thinking and behavior. It builds upon and extends the education and transformative theory of Emotional Intelligence (EI) that began in 1979 when Nelson and Low created and published the Personal Skills Map.

The PEM© is provided as a positive assessment experience. It is positive because: (a) it is not a test – there are no right or wrong answers, (b) it is designed to help people explore and learn more about themselves, and (c) when combined with guided mentoring and training, the instrument can be used to help people learn and develop important life skills to become happier, healthier, and more effective.

Instructions

The main thing to remember when experiencing the PEM© is to just be honest. If you are not as honest as possible, then your results will be less useful to you later during training. You may find yourself thinking about whether the question pertains to situations at work or at home. Answer the questions according to the environment you would most like to improve.

Your answers will be kept strictly confidential.

Read each item carefully and answer by marking a circle around one appropriate letter and number combination to the right of each item. The letter/number combinations are as follows:

- N=0 Stands for Almost never like or descriptive of me.
- R=1 Stands for Rarely like or descriptive of me.
- S=2 Stands for Sometimes like or descriptive of me.
- U=3 Stands for Usually like or descriptive of me.
- A=4 Stands for Almost always like or descriptive of me.

Follow instructions carefully and do not skip items unless directed to do so.

Working quickly, it normally takes about 20 minutes to respond to the items. Scoring may take an additional 20 or so minutes. You are encouraged to self-score the instrument as per the embedded instructions. The PEM© will help you learn more about your individual personal excellence skills, systems, and principles.

After obtaining and graphing Your Personal Excellence Profile on page 7, continue following the instructions to find, record, and add your T-scores (standardized scores). Your T-scores will enable you to map your current levels of personal excellence using the Personal Excellence Map on page 8. Lastly, record your total standardized score on the continuum of personal excellence on page 9.

Please begin when you are ready.
Appendix B

Normative Statistics for the Personal Excellence Map
<table>
<thead>
<tr>
<th>Scale</th>
<th>Min</th>
<th>Max</th>
<th>Mean</th>
<th>SD</th>
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<th>Theoretical Max</th>
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It is no secret that professional, academic, and life success varies from one person to the next. Why do some individuals settle for apparent mediocrity while others find great success, satisfaction, and happiness in life? Some theories of human behavior credit emotional intelligence (EI) for explaining a substantial part of such quality of life variables.

In their book, Emotional Intelligence: Achieving Academic and Career Excellence (Prentice Hall, 2003), Darwin Nelson, Ph.D. and Gary Low, Ph.D. provided a transformational model of emotional intelligence based on nearly 30 years of education research and best practices. They ended their book by introducing a new theory, a theory of personal excellence, for life-long self-renewal and achievement. Characteristics of high achievement include accurate self-knowledge and feelings of accurate self-value that make possible responsible, dignified behavior; relationships that are varied and strong; getting along well and working productively with others; and effectively dealing with the daily pressures and demands of life and work. As stated by the authors, “emotional intelligence is a continuing process of developing specific emotional skills” (Nelson & Low, 2003).

Personal excellence also is a continuing process of self-renewal guided by one’s systematic approach toward developing personal EI skills. Personal excellence represents a process of becoming the best person one can be and is reflected in how one is, as well as what one does. Personal excellence is indicated in people who develop their gifts and talents to the fullest, achieving a harmony in how they think, feel, behave, and believe that leads to productive relationships and outcomes. Rather than an arrival state, personal excellence is a journey in positive development beyond one’s self. It manifests in self-defined and self-valued achievements that reflect one’s best efforts. The EI-centric theory of personal excellence connects the process of building quality from within with the lived experience of each individual. Use the Personal Excellence Map to explore your current level of personal excellence and let it serve you as a guide in your journey of positive personal development.

Richard D. Hammett, Ed.D.