

Unit 9

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Class HW420-01



This paper introduces the concept of assessing a person's spiritual state of health and wellness. The benefits of being able to inventory or assess a person's spiritual state of wellness is discussed. The assessment form is developed through a specifically designed set of questions for this purpose. The questionnaire is "pilot" tested by interviewing trusted people who are not in the spirituality or health and wellness profession. The results of the pilot test are discussed including changes made to the questionnaire from the interview learning experiences. The benefits, importance and the interviewee or clients' educational value of each question is documented. The value of spirituality health and the mind-body-spirit interconnectedness and awareness is described. It is made clear spirituality can be viewed as essential to a healthy, long lifespan.

Spirituality has various definitions depending on the source. Monod, S. M.D. et al (2011) defines spirituality as a sense of within integration or inner connectedness and transcendence beyond one's present circumstances. Monod goes on to describe spiritual wellness having two dimensions. The vertical dimension in terms of belief in God or a higher power or energy and horizontal including life purpose and satisfaction. Taking our own spiritual inventory and those we serve forms a basis from which to grow in life's satisfaction and wellness. The inventory can be a baseline from which to compare to a year or more from now as spiritual growth takes place over time. The comparison, while some may prefer not to have a measurement, does provide a benefit for a wellness coach in terms of being able to assess our clients' progress. Most importantly, our clients can witness their own growth from their past spiritual markers. This is a fulfilling experience with the benefits of spiritual growth. The best measurement is a person's growth, in body and mind as they are interconnected to spiritual growth. We can make

improvements to our own spiritual well-being, to our wellness program for those we serve and thereby impacting our own overall fulfillment and contribution to humanity.

A cross section of four interviewees was selected to provide broad feedback on the draft questionnaire. An iterative approach was taken in that changes were made based upon the feedback from the first three interviewees. All of the interviewees were known to me while one is a good friend, others were acquaintances through neighbors or other friends. One person, a female, is 58 years of age and she responded to an updated final draft version. Another female is 94 years young (Appendix A). A third person, a male of age 84, and a fourth person is 28 with four children and pregnant. Each interviewee was provided an introduction of the reason for the spiritual health and wellness inventory. The term “assessment” was also used and care was taken to make sure the interviewee was comfortable to be open with their responses. They were also made aware that the overall interview experience will be used to improve the questionnaire. It was made clear that the assessment is in the spirit of non-judgment of the person. The feedback from the interviewees, including clarifications about the questions and other thoughts were used to update the inventory topics for the betterment of the assessment.

The assessment form consists of two parts. Part one (see below) using a one to ten rating scale to determine how an individual currently feels about their overall satisfaction with their life. The ten rating scale questions are broad in nature to access if one or more of the life fulfillment areas are out of balance. As an example, if a person rates their business or professional life low, this could cause their mind, body and spirit balance to need attention. See Appendix B for the four interviewee responses to each of the ten rated questions. The rating questionnaire includes open discussion write in should the future client or interviewee want to provide more information for the interviewer.

The 58-year-old rated herself a “two” after adding the self-discipline to this list. Other than this rating, all interviewees, except the 28-year-old, rated their current level of satisfaction in the ten areas as a “seven” or higher. The one exception to this was the 84 year old has physical issues and rated his wellness in this area as a “six”. The 28-year-old in contrast had only three of the ten ratings above a six.

Part One- Rating measurement for spiritual wellness assessment

For questions 1-10, circle the number for each category that represents your current level of satisfaction in that area of your life. The higher the number the higher level of satisfaction.

- | | |
|---|-----------------------------|
| 1. Your Professional, work or Retired life | 1 2 3 4 5 6 7 8 9 10 |
| 2. Your physical wellness | 1 2 3 4 5 6 7 8 9 10 |
| 3. Your emotional & mental wellness* | 1 2 3 4 5 6 7 8 9 10 |
| 4. Your spiritual wellness | 1 2 3 4 5 6 7 8 9 10 |
| 5. Your self-discipline | 1 2 3 4 5 6 7 8 9 10 |
| 6. Your family and parent child relationships | 1 2 3 4 5 6 7 8 9 10 |
| 7. Your social relationships & FUN time | 1 2 3 4 5 6 7 8 9 10 |
| 8. Your life-long learning, goals & achievements | 1 2 3 4 5 6 7 8 9 10 |
| 9. Your authentic self | 1 2 3 4 5 6 7 8 9 10 |
| 10. Your fulfilling life | 1 2 3 4 5 6 7 8 9 10 |

* To include anxiety and stress level

Open discussion about any of the above questions or other thoughts for which you would like to make the interviewer aware.

The open-ended list of questions (Part Two) includes multiple or alternative questions to provide more detail in each spirituality topic. The ten open ended questions used for assessment described below includes three parts. First, the interviewee or new client questions including the multiple part or alternative questions. Secondly, the reason or benefit for having each question is described, that is, why it is important for this question to be part of the spirituality and wellness inventory or assessment. Lastly, each interviewees' response to the question topic is included.

Part Two - Question One – Mind-Body-Spirit Connectedness. What does this mean to you? Alternatively, When you hear the term, mind, body and spirit, what comes to mind? This question and the alternative question are important to start the open-ended assessment as it conveys to the interviewer if the person has the general spirituality connectedness knowledge of wellness. If a person has not heard this term, they may have others methods or descriptions for their awareness of connectedness. This is where a careful listening comes into play. That is, when asking the alternative question, “what comes to mind”, one can determine if the interviewee has a sense of whole-being interconnectedness. The 94-year-old female responded so beautifully to this question. She stated, “To be healthy, you need all three to be right”. The 84-year-old male stated attitude affects our feelings and everything is about mind and body. The 28-year-old responded similarly, although she stated she is not a religious person, she said “It means a healthy balance between mind, body, and spirit.”. The 58-year-old stated., “The connection of the three is important to maintain a happy life”. The responses to this question was refreshing in that I was pleased each interviewee seemed to understand the mind, body spirit connection and the value for a healthy, fulfilling life.

Question Two – An Optimistic Mindset - When you think about your inner thoughts and your spoken words, do you consider yourself to be more optimistic or pessimistic? If

the interviewee is on the fence about this question, **ask, Please describe your approach to thinking positive or negatively about your life?** Depending on the response to the “inner thoughts” first questions, the alternative question may be asked for clarification. Having an optimistic attitude over the experiences life brings us, can have a considerable impact on our health and well-being throughout our lifetime. The experiences life brings are many and working to deal with them in an optimistic way, while it may be a challenge at times, will pay dividends over time. Our health and well-being thrive when we manage stress by having an optimistic mindset. The title of the American Psychological Association abstract says it all (2016), that is, “Optimism is associated with mood, coping, and immune change in response to stress”. While I know from taking care of a 90-year-old relative, the elderly may have difficulty being positive given the aging process and health challenges, the two people age 84 and 94 interviewed, have a deep optimistic mind set. Likewise, the two younger people referred to themselves as having and working on an optimistic mind set. This was good to hear, as with all assessments, we take the questionnaire responses as a whole to determine the overall assessment.

Question Three – Gratitude - What types of things are you grateful for in your life. If it feels appropriate, ask, **Do you generally take time to acknowledge the things you are grateful for on a regular basis?** There are documented sources of the mind and body benefits to having a gratitude practice. Similar to having an optimistic mind set, they include both emotional, mental and physical benefits. Wood, A. (2010) Gratitude and Well-being, A review and clinical integration describes it as more than a thank you. It is a about deep gratitude which improves over all well-being, health and relationships through specific gratitude exercises. The two elderly interviewees spoke about being grateful for their long life. The 94-year-old feels a deep gratitude for nature and speaks about being in awe of God’s work. The younger 28-year-

old, talked about trying to remember to say “thank you”. But, then she said, she feels up lifted with gratitude in the morning when she is awakened hearing her baby cry. With this statement I felt she knows a deeper gratitude than saying “thank you”. The 58-year-old went beyond saying thank you and talked about daily letting someone know they appreciate them. She is very appreciative of family and friends. The four interviewees did not practice their quiet time in inner gratitude or spend time writing in a gratitude Journal.

Question Four – Anger and forgiveness - When was the last time you remember being angry at someone? Are you still angry? Have you taken any action (positive or negative) on your anger? In the past, how have you gotten over your anger and forgiven the person?

It maybe best to ask multiple questions about anger and forgiveness to get the broad picture.

Limiting the amount of emotional anger, we allow in our mind and body is important for our long-term well-being. Holding anger inside our body can manifest in the body and while difficult to study the effects, it is believed potentially to contribute to chronic diseases. Davis, D. E. (2010). et al meta research describes the act of forgiveness both of others and self to have a correlation between physical and mental health. The two elderly interviewees did not recall anger being a part of their long life. The 94-year-old described her marriage as carrying no anger. The one story that she remembered was her husband giving his sister their only \$600 savings and his asking for her forgiveness. The 84-year-old acknowledged this includes self-anger and said he gets angry with himself for letting things bother him more than they should. He stated holding anger is stressful and he does not want that stress. The 28-year-old had a recent incident which she said she talked it over with her husband and found a way to forgive her sister. The 58-year old stated she is angry with her spouse over his lack of follow through on chores about four times a week. She stated when she let’s go of the anger, she then forgives him.

Question Five – Your values - What do you consider to be your values in life? What values or guiding concepts do you live by? These alternative “value” questions are important because of the connection to our value system and spirituality. As Seaward, notes, “Values have a very subtle yet powerful way of directing our lives.” If a new client for which I am doing a spirituality assessment does not seem to be able to state what their values are, perhaps they should have a tool for developing their written core values. I decided to not have a whole list from which to choose. As Jeffery, S., describes (n.d.) “values as being discovered” as opposed to selecting them from a list. He states, a list is not the way a value system is developed. The 58-year-old described her values as being “caring”, “helpful” and “respectful” and not crossing the line from good to bad. The 28-year-old stated “I am a big believer in doing unto others as you want done onto you. The Golden Rule, I think about this before I say or do things, you have to earn respect”. The 84-year-old male also quoted the Golden Rule. The 94 year-year-old stated, this is a hard question, she then said, “I am open minded but have strong opinions”.

Question Six – Mystic moments or experiences – What comes to your mind as being a mystic moment in your life? Depending on the interviewee, clarification of the meaning of a mystical moment should be explained. Such as, there are various interpretations and each person has their own interpretation of mystical moments. I describe them to be the unknown energy meeting up with that which cannot be perceived by our five senses. These experiences, generally, cannot be explained solely by human intellect. When moments are recognized as mystical, they can be beneficial to building a whole, balanced life of healthy mind, body and spirit. They can influence decision making especially when they are based on intuitive moments. In fact, listening to the inner, intuitive voice and using it to make key decisions has been studied by the U.S. military (Gregoire, C., 2017). Two of the interviewees referred to their mystical moments

as related to dreams of loved ones who had passed on. The 94-year old and the 58-year-old have vivid dreams of her husband and a brother, respectively, who passed away unexpectedly. These events appear so real to the two interviewees, they provide comfort late at night when they miss their loved one, even after over decade has passed. This question was added during the iterative pilot test process and the other two interviewees did not have this question.

Question Seven – Mindfulness - What does Mindfulness mean to you? Alternately, **What does present moment awareness mean to you?** The benefit of knowing the response to this question is to have a sense of the attention the interviewee puts on their thoughts in the moment and the amount of ruminating they may have in their thoughts. It can assess if they have the knowledge of the benefits to be in the state of present moment awareness. Having present moment awareness gives a person the strength to behave, respond and act to daily life experiences in a thoughtful way. These experiences range from both routine to those that are more of a unique or unusual in nature. The two elderly interviewees were not responsive to this question. The male stated it sounded like psychobabble and the 94-year-old stated she would like to skip this question. Both of them seemed to feel the questions were getting repetitive. The 28-year-old stated “It means being aware of myself, being aware of my surroundings”. Interestingly the 58-year-old used the word “surroundings” as well, referring to being aware for safety and politeness. She also seemed to refer to it as being courteous and respectful of others, using the “when in Rome do as the Romans do” expression.

Question Eight – Meditation Do you take time to quiet your mind? Do you now or have you had a meditation practice? Have you attended yoga classes where you have taken a few minutes (shavasana) to just be still and go within your body and perhaps spend time in “no thinking”? The reason for multiple questions for this topic is for those individuals who

may not know they are actually meditating or those who have misconceptions about meditation. Goldman and Davidson studied mindfulness and meditation since their graduate work at Harvard. Their review of many peer reviewed studies (2017) reveal that people who meditate have better mental agility, recovery from stress (resiliency through lower cortisol), less self-focus and more compassion with potentially improved health markers. The 84-year-old stated he has meditated both before and after his retirement but currently “does not need it”. He stated at times he had used the “Humm” sound to focus his mind to meditate. The 94-year-old stated she meditates in the morning in nature’s growth and at night looking at the moon and stars. The 58-year-old and the 28 both stated they would like to meditate.

Question nine - Self-renewal What does self-renewal mean to you? Do you feel you take time for self-renewal? What specific actions do you take to promote your own self-renewal? Self-renewal is very important to our mind, body and spirit balance in today’s overly busy society. Blaire, K. (2017) simply describes self-renewal as the ability or process to renew oneself. Blaire goes on to say that without a focus on self-renewal on a continuous basis we may find ourselves in “the valley of the dry bones” meaning in continuous stress or even despair. The 93-year-old states she figures things out every day. Although she interpreted self-renewal to mean resourcefulness in dealing with problems, I know her well enough to feel she renews herself among nature in her one-acre yard every day. The 84-year-old states, refresh oneself and clean out the cob webs, however he stated he does not look at it as something that is planned out. He believes self-renewal to be more of a habit and he again referred to “self-renewal” as psychobabble. The 58-year-old uses twice a year vacations as her time to self-renewal her mind, body and spirit. The 28-year-old stated, “It means you reflect on yourself and you use it to grow

as a person”. She thought of self-renewal as being self-aware and reflecting on what she would do differently.

Question ten – Reflection - what was the most difficult time in your life and how did you handle it? This question was added because it gives the interviewer a specific behavioral experience from which to better understand the client’s ability to adapt and use their spirituality for handling life’s most difficult experiences. The 28-year-old stated being told her step son age seven has cancer. She knew it was important for her to be strong for their son and her husband. She remains strong and optimistic about the treatment program. The 94-year-old, got teary eyed and paused as she then remembered her son being there holding her after her husband passed away just minutes before at home in his bed. The 58-year old was reluctant to talk about the two deaths in her family. She did however discuss her time for recovery after her divorce which was many years ago.

The interviewees felt the rating questionnaire or part one should be completed prior to the open-ended questionnaire interview. They felt the rating form got them in the frame of mind to go within and think about their life and how they conduct it as well as thinking more deeply about spirituality. There were a few changes made to improve upon the assessment effectiveness of both questionnaire part one and part two. Part one initially included two separate questions one being “Your mental wellness” and one for “Your emotional wellness”. They have been combined based upon feedback and the draft of the open-ended question (part two) about discipline was removed and added to part one, rate “Your self-discipline”. A question was added about the most difficult experience in the interviewees life. This was added because it came up in discussion and it is a good indicator of a person’s spiritual behavior using an experience that is real to the interviewee. Also, the rating questionnaire initially included

“Your financial well-being” and that was deleted and “Your fulfilling life” was added. The feedback was that the financial aspect of a person’s current life state should not be part of the spirituality assessment. I took this to heart because, it is true, very poverty-stricken people in various cultures around the world have deep spirituality that seems to protect them from what many would describe as a life of hardship.

After completing the interview, which included discussion and responding to questions, the three female interviewees described this experience as being self-reflective and beneficial to their understanding of their spirituality inventory. It has given the 58 and 28-year interviewees ideas for improving their spiritual life. This was stated without prompting. My approach to implementing a spiritual improvement plan is “baby steps”. For the 58-year old who asked questions about a meditation practice, I have provided her with the written suggested steps to start a daily home-based meditation plan. I also recommend she work on her anger management for better spiritual balance. I have provided her with the anger management program document which along with meditation includes conscious breathing and gratitude journaling.

I feel the 28-year -old has an open mind to take the steps to improve her life through a focused effort to engaging her mind, body and spirit balance. I would like to develop a daily spiritual growth plan for this mentee. It would include a daily checklist for the five initially recommended activities, to include yoga, meditation, gratitude journaling, Mindfulness training and practice and life purpose and value system work. The detail for each activity (also taking baby steps) would be to first take a yoga class, perhaps one on YouTube for pregnant women. After the class I suggest she take the shavasana time for herself to meditate. Second, on days when she does not do the yoga work, she can meditate starting with five minutes per day. Third, a gratitude journal for use every day would be beneficial. Training for gratitude journal writing

can come from the YouTube, Dresser, S. (2015), Morning Gratitude Positive Affirmations. Take the time to write down those gratitudes that resonate with you and then as time goes on create your own daily list of gratitude. Forth, taking a class in Mindfulness or having a coach to teach the concepts and learn to practice present moment awareness on a daily basis. Adding the present moment progress to the gratitude journal is helpful. Making her mind matter, meaning avoiding rumination of the same thoughts repeatedly can benefit a person's "thought life" and free up their valuable brain resources for more important things. For the initial spiritual development plan for the 28-year old, I would work with her to write a Life Purpose Statement. This would include her core values. This is not something taught in schools and from this assessment experience, I believe people can learn more about their value system which can be their guiding light toward having a body, mind and spiritually fulfilling life.

This assessment questionnaire (Appendix C) is beneficial for interviewees to learn what is important in developing their own inventory for a state of wellness, self-reflection, and spiritual development. There are times in a person's life where they are inadvertently exposed to a process, conversation or an assessment form such as discussed and the Aha moment can be life changing. This inventory interview form can be used in growing my wellness practice. This assessment is beneficial for the coach or wellness practitioner to have their own inventory and continue to practice spiritual development over a lifetime. Certainly, the expression, "Practice what you preach" is necessary for an authentic influence in our service to humanity.

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Appendix A - Mrs. Gocio, 94 years young, my hero, my inspiration ☺



**Appendix B - Responses from four interviewees for self-rating questionnaire
(including updates to the questionnaire)**

AGE of interviewee	93	84	58	28
1. Your Professional, work or retired life	8	8	8	3
2. Your physical wellness	7	6	8	7
3. Your emotional & mental wellness*	9	7	8	6
4. Your spiritual wellness	8	7	7	7
5. Your self-discipline (ADDED)	N/A	N/A	2	N/A
6. Your family and parent child relationships	8	7	10	8
7. Your social relationships & FUN time	9	7	10	4
8. Your life-long learning, goals & achievements	9	7	8	5
9. Your authentic self	10	7	9	6
10. Your fulfilling life (ADDED)	10	N/A	7	N/A

* TO INCLUDE STRESS AND ANXIETY

94 year old – I am not sorry about anything in my life, I take what is given to me.

84 year old – I wish I had known my father better.

58 year old - My must do list distracts from my “wanna due list”, this is why I feel I do not have self-discipline.

28 year old – I have four children, for now my social life is not important.

Appendix C – The Spiritual Assessment Questionnaire

Part One- Rating measurement for spiritual wellness assessment

For questions 1-10, circle the number for each category that represents your current level of satisfaction in that area of your life. The higher the number the higher level of satisfaction.

- | | | | | | | | | | | |
|---|----------|----------|----------|----------|----------|----------|----------|----------|----------|-----------|
| 1. Your Professional, work or Retired life | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 |
| 2. Your physical wellness | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 |
| 3. Your emotional & mental wellness* | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 |
| 4. Your spiritual wellness | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 |
| 5. Your self-discipline | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 |
| 6. Your family and parent child relationships | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 |
| 7. Your social relationships & FUN time | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 |
| 8. Your life-long learning, goals & achievements | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 |
| 9. Your authentic self | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 |
| 10. Your fulfilling life | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 |

* To include anxiety and stress level

Open discussion about any of the above questions or other thoughts for which you would like to make the interviewer aware.

Spirituality Assessment PART TWO

Question One – Mind-Body-Spirit Connectedness - What does this mean to you? When you hear the term, mind, body and spirit, what comes to mind?

Question Two – An Optimistic Mindset - When you think about your inner thoughts and you're your spoken words, do you consider yourself to be more optimistic or pessimistic? Can you describe your approach to thinking positive or negatively about your life?

Question Three – Gratitude - What types of things are you grateful for in your life? Do you generally take time to acknowledge the things you are grateful for on a regular basis?

Question Four – Anger and forgiveness - When was the last time you remember being angry at someone? Are you still angry? Have you taken any action (positive or negative) on your anger? In the past, how have you gotten over your anger and forgiven the person?

Question Five – Your values - What do you consider to be your values in life? What values or guiding concepts do you live by?

Question Six – Mystic moments or experiences – What comes to your mind as being a mystic moment in your life?

Question Seven – Mindfulness What does Mindfulness mean to you? What does present moment awareness mean to you?

Question Eight – Meditation Do you take time to quiet your mind? Do you now or have you had a meditation practice. Have you attended a mediation group or class? Have you attended yoga classes where you have taken a few minutes (shivasana) to just be still and go within your body and perhaps spend time in “no thinking”.

Question Nine - Self-renewal What does self-renewal mean to you? Do you feel you take time for self-renewal? What specific actions do you take to promote your own self-renewal?

Question Ten, what was the most difficult time in your life and how did you handle it?