

**The Spiritual Checkup
As A Means of Pastoral Counseling**

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Demonstration Project

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- My Doctor of Ministry Demonstration Project contains five chapters plus two appendices and a bibliography.
- The project shows that it is possible to establish a congregational based program in which the rabbi leads congregants through a Spiritual Checkup as a positive proactive approach to pastoral counseling.
- My goal was to develop a new paradigm for doing pastoral counseling. Most pastoral counseling is rooted in the rabbi responding to a crisis in the life of the congregant. The protocol and program that I developed for Spiritual Checkups is a positive, non-crisis way of creating a sacred dialogue between the rabbi and the congregant. These Spiritual Checkups are intended to help congregants evaluate their progress on their individual spiritual journeys and to foster a more intimate relationship between the rabbi and the congregant.
- The project is divided in the following way:
 1. A statement of the problem that I wanted to address: Can a rabbi create a new paradigm for doing proactive pastoral counseling through the protocol of a spiritual checkup?
 2. A discussion of the religious and clinical principles that support the development of a spiritual checkup program
 3. A detailed description of how the spiritual checkups were to be carried out and evaluated.
 4. A report on the actual execution of the spiritual checkup program including unanticipated issues that arose that impacted the project. I included extensive material from actual spiritual checkups that I carried out.
 5. Discussion of the implications of spiritual checkups in the rabbi/congregant relationship; the contribution of the project in clarifying religious and clinical issues related to spiritual checkups; future implications of this project
- I utilized traditional Jewish teachings on *teshuvah* and *cheshbon hanefesh* (a spiritual accounting) and clinical and pastoral counseling literature that addresses ideal pastoral counseling relationships including appropriate boundaries in those relationships

Chapter I: Issue Addressed by the Project

A. Background and History of My Project

My Doctor of Ministry project focuses on the creation of regular spiritual checkups with congregants as an alternate modality for pastoral counseling. Thus, as I have conceived this project, I want to draw on my religious education, my training in pastoral counseling, and my years of psychotherapy to create a modality suited for my pastoral counseling work. I have sought a project that will create new opportunities and structures in my rabbinate for me to interact with my congregants in a positive, and non-guarded way that will bring me and my congregants greater understanding of who they are as spiritual beings; and hopefully to create a structure that seeks to promote one of the essential goals of religion: *to help us grow; to become more human, to articulate our own unique stories, to see where we have perhaps gone off the track and hopefully to find a way to refine our personal road map for further growth.*

In my career, the opportunity to be a spiritual mentor to my congregants has been limited. When do my congregants come to seek me as a pastoral counselor? After spending 26 years in the pulpit rabbinate, functioning in the role of a pastoral care giver and pastoral counselor in many different venues, the counseling setting that is predominant is the congregant or client coming to see me in a time of crisis: personal disruption and suffering.

Sometimes these visits come completely out of the blue, with no prior warning. Or, as we have studied in our Doctor of Ministry training, the presenting “issue” or “question” often turns out to be an opportunity for exploring or seeking help with a much more complex life situation. One of the greatest challenges of pastoral counseling is being able to listen carefully enough to determine what is really going on within the person’s life, why they have come to see me at this moment and how do they believe, realistically, or through their transference that I can help them? Different people want different things but in general they want to believe that I have the ability to offer them something useful to take with them so that their lives have more clarity, their situation seems more supported, there is some sense that God is with them in their crisis that makes that crisis more bearable, or simply that someone took the time to take them seriously as human beings in world where dehumanization, isolation, loneliness, economic distress, and general anxiety is the everyday reality for so many of us.

The counseling cases that present themselves to me are numerous and varied. Couples are having marital discord and hope that I can help them to heal their relationship. Parents come to me with a child rearing difficulty hoping that I can give them some comfort, offer some advice, or even be in the position of referee. (Thank goodness my training has taught me of the dangers of being caught in the dangers of triangulation.) Adult children are faced with a sense of desperation as how their sandwiched generation can be both loving and supportive parents to their young children while being supportive and compassionate to their elderly parents. Congregants often need to unburden themselves of guilt associated in dynamic terms with a conflict with their superego or in spiritual terms, a sense that they have sullied or compromised the image of God that is

inherent in all human beings (even those who are confused about their relationship with God.) Of course, people come to me in moments of bereavement when they see me and need me to be the loving presence of God supporting them in their grief. And in the most challenging of cases, which often intertwine with situations already referenced, people are struggling with addiction, abuse, depression, anxiety, and even serious psychiatric disorders ranging from borderline personalities to even psychotic breaks. Of course, these are moments of great significance but they are fragmentary at best and don't normally lend themselves to a more thoughtful and structured reflection of a congregant's unique spiritual journey.

In my supervision, which was so vital in our Doctor of Ministry work at both the Post Graduate Center for Mental Health and the Hebrew Union College-Jewish Institute of Religion, every single verbatim in my recollection, brought for discussion, learning, analysis and deliberation, reflected the work of my colleagues of all faiths confronting variations of crisis pastoral counseling. They all reflected people coming to see us, not to tell us how great life is, but to share with us where their lives have become overwhelming, painful and even intolerable..

This spiritual checkup project is an attempt to create for me and potentially for other pastoral care givers opportunities to do a different type of pastoral counseling. The idea of regular spiritual checkups is rooted in an approach to pastoral counseling that sees the rabbi in the role as a positive and available spiritual advisor to his/her congregants. In this structure, rabbinic pastoral counseling is a healing relationship grounded in an on-going holy conversation. It is not about identifying pathology or disfunctionality; ideally,

it is an honest appraisal by the congregant themselves of where they are as spiritual human beings in their life's journey.

There are many ways to describe this healing relationship. One that I have found extremely provocative is the idea of Hitlavut Ruchanit or spiritual accompanying. Quoting Anton Boisen, Rabbi Dayle Friedman frames a pastoral stance that undergirds what I am trying to accomplish. I want to meet my congregants as creators of their own personal narrative and try to find out where their story is at this given moment. "The individual encountered by pastoral caregivers is as complex, multilayered, rich, opaque, and in need of explication as any sacred text." (Friedman, 2002) Carol Ochs speaks of this in her writings as well. (Ochs, 2001)

James Griffith and Melissa Griffith, in their work, *Encountering the Sacred in Psychotherapy: How to Talk with People about Their Spiritual Lives* write about the counselor/ counselee alliance: "We participate in the co-creation of stories by our way of listening, our questions, and our reflections. As stories are told, the response of silence, raised eyebrows, learning forward, or distractedly doodling becomes an edit, punctuation, influencing the teller to shift topics, say more, soften a point, or cease speaking. Appreciative intense attention may be the most powerful way of all to co-create a story. (Griffith and Griffith, 2002, p.89) To put it simply, we don't want to interfere by our anxiety, counter-transference, or boredom with the unique story that can be told in the rabbi's office.

The role of the rabbi has changed in our world. In generations before, the rabbi was seen as a religious authority, prayer leader, and ritual functionary. In our increasingly

secular world, religious institutions and clergy have new roles. People come to religious institutions not only to perpetuate traditions of the past but in search of meaning and direction in their lives. Often people stay away because they think that institutional religion is not interested in their spiritual journey. However, many religionists who enter our institutions are spiritual seekers and I believe crave for a more intimate relationship with their clergy. They want to relate to them not only as symbols but as real people.

Achieving this kind of relationship is not simple. My project is an exploration of how to create a structure, where it is natural and even expected for rabbis and their congregants to have regular, serious spiritual conversations. The goal of the project is to find the correct structure for encouraging these spiritual checkups in a congregational setting that is safe, illuminating, and potentially healing. In these spiritual checkups, the congregants have an opportunity with my help as their rabbi to explore where they are on their spiritual journey. As I have already articulated, often, the conversations between congregant and me center on a problem: some sort of crisis. The congregant wants to unburden themselves or hopes that I will be a sensitive listener. At times, the congregant even seeks some practical advice. These are essential roles for rabbinic pastoral counseling but it is worth exploring other possibilities. Can I as the rabbi transform myself from a crisis counselor into a spiritual mentor facilitated by the spiritual checkup protocol? This is the challenge and essential question of my project.

B. Specific Need to which I plan to minister.

Why is this project worth doing and why do I feel that it is feasible? First, this venture is rooted in the practical realities of the rabbinate. Complaints or frustrations exist

among congregants that they do not know their clergy. Many people are not regular worshippers. In most congregations, people don't avail themselves to adult learning. Even regular worshippers have difficulty connecting with the rabbi at the brief collations that take place after services. And the rabbi cannot ignore the high level of unaffiliation that increasingly disconnects Jews from a relationship with a rabbi.

We live in a psychological age. Often people seek out psychotherapists, social workers, and mental health counselors to sort out the problems that they are confronting. In our society, people regularly check in with their personal physician, and their dentist to monitor their path this past year. Have they gained weight? Is there blood chemistry the way that it should be? Have any major changes taken place in their habits or life that needs examination? Are they on a path towards health or are they moving in a direction that will lead to more problems in the future. But, where do they check in to find out about the state of their soul and spirit?

Second, I know that my members are deeply spiritual beings. They have profound inner lives and they are not always certain that the synagogue is the place to explore their spiritual concerns or that I, as the rabbi, really wants to listen to them. They have God questions that have not been answered. Indeed, theological questions that they do not even know how to formulate but which are real and pressing to them. If they could find a way to articulate them and struggle with them with me, their lives would achieve a greater sense of meaning and purpose.

In *The Jew Within: Self, Family, and Community in America* by Steven M. Cohen and Arnold M. Eisen (Cohen and Eisen, 2000), these scholars give us an insight into the

spiritual journey of many modern American Jews. Eisen and Cohen learned that the moderately affiliated are deeply committed to their Judaism, but it is not the faith of their grandparents. The Jews that they deal with see their Judaism as a journey. Only "the sovereign self" is the arbiter of what happens on that journey because these American Jews are little moved by the authority of God or the normative tradition in their behavior and attitudes. They seek a Judaism that is meaningful to them, and hence requires a degree of personal investment that is high in the private sphere of the family where emotions are deep. Their Judaism is very private and deeply personal. A challenge for rabbis today is not only to understand these people but to show them that they as rabbis can help them understand their spiritual journey and even assist them in their quest.

Third, the project has arisen because of my experiences with psychotherapists, who were open to my spiritual struggles and who over the course of our work together, have helped me to give voice to important aspects of my personality and life that need examination, repair, and reconstruction. Unfortunately, many people do not avail themselves of such help, and more frustrating is the fact that many psychotherapists do not have the tools or predilections to help their clients with spiritual issues. Fortunately this hesitation to deal with spiritual issues is changing among some psychotherapists. (Miller, 1999)

Fourth, I believe that our tradition already contains structures and traditions that can be used to formulate new pastoral counseling frameworks that are both authentic to Jewish tradition and psycho-spiritually effective. The goal of this spiritual checkup protocol is to formalize sitting down with me and to have a structured, but not rigid reflection on the congregant's current situation discussing: relationships, goals, joys,

hopes, disappointments, roadblocks and even their relationship to God. I approach the last item, about their relationship to God, with caution. I want the encounter to be spiritual and yet, as value free as possible. I am concerned that the spiritual checkup not impose a religious language which shapes the congregants narrative in a false way. I am hoping that the spiritual checkup will help people realize that they are spiritual beings and that they should not be afraid to look at their lives using this lens.

The conversation should be a checkup: a reflection on a congregant's current state. All efforts will be made to make sure that this is not about the rabbi judging the congregant and the assumption is that the congregant will ultimately determine, obviously with the rabbi's careful guidance, where they are on their spiritual journey.

. This idea of a spiritual checkup is a not an original idea and I explored this approach experimentally in my rabbinate about 18 years ago. My prior experience with this initial attempt and what I have learned in the Doctor of Ministry training has led me to reframe this project in the way that I will describe. Rabbi Terry Bookman in 1991 wrote an article entitled: The spiritual check-up. (*Shema*, 10/6/1991)

"What I propose is the following: Once in every two years, each member of this congregation should sit down with me to check up on his/her spirit. You need not wait

All you need to do is call the Temple and schedule an appointment with our office. We will send you this form. Fill it out before coming in, and then we'll spend an hour or so talking it over, taking your spiritual inventory. It is that simple. And you can do this as an individual, couple or family; we are equipped to handle each of those situations. I expect that most of you are in good shape, and we will confirm that for you. Where there are questions, problems, issues to be worked on, we can work out a course of action intended to bring you to full spiritual health. I urge you to avail yourself of this opportunity. We

care about you and want to help in your nurture. Your spirit will thank you." (Shema, 10/6/1991)

Rabbi Bookman was shocked by the response. He expected only a minimal response. But he was surprised. Two years into the project, several people had continued to come for spiritual checkups. However, I spoke to him last year and the spiritual checkup is no longer part of his synagogue's life.

C. The Relevance of This Project to Ministry in a Wider Context

My project is an attempt to create a detailed, and highly structured spiritual checkup protocol as a way of doing pastoral counseling in my congregation. I believe that it has great potential in breaking down barriers and cultivating a deeper level of discourse about spiritual matters in my congregation. In congregational life, we often speak of creating programs and events that judge the relative success of our synagogues. Yet, I believe that people long for more than just attending successful programs and religious services. I am confident that institutionalizing spiritual checkups, as part of what I do as a rabbi, will potentially create a different kind of discourse among the congregants about the issue of spiritual growth, personal meaning, and the special role that I can play in nurturing these important processes. If I can create a format and protocol that works for me, I believe that it potentially has the applicability to other rabbis and to other clergy people as we all try to create relevant institutions that promote a deeper sense of spirituality among our congregants who are in many ways a generation spiritual seekers.

Chapter II: Principles that guide and inform this project

A. Religious principles and supporting literature that clarifies and supports these principles.

If one is going to develop a framework for conducting spiritual checkups, it is important to have a working definition of spirituality. Defining spirituality is not as simple as it might appear. The definition is important to my project because we do not want to make this a religious checkup. This approach would imply that we were judging people based on their adherence to certain specific dogmas, rituals, or traditions. Thus, it is essential that we define clearly the difference between religion and spirituality.

Coming up with a definition of spirituality is challenging. James L. Griffith and Melissa Elliot Griffith dare psychotherapists to begin to find ways to deal with spiritual issues. They offer the following definition:

Spirituality is a commitment to choose, as the primary context for understanding and acting, one's relatedness with all that is. With this commitment, one attempts to stay focused on relationships between oneself and other people, the physical environment and one's heritage and traditions, one's body, one's ancestors, saints, High Power, or God. It places relationship at the center of awareness, whether they be interpersonal relationship with the world or other people, or intrapersonal relationship with God or other non material beings....Religion represents a cultural codification of important spiritual metaphors, narratives, beliefs, rituals, social practices, and forms of community among a particular people that provides methods for attaining spirituality, most often expressed in terms of a relationship with the God of that religion. In this sense, God personifies and objectifies the relatedness of spirituality. (Griffith and Griffith, 2002, p.15)

According to this definition, spirituality is about a person living in relationship and religion is about talking and living specific cultural forms.

Miller and Thorenson (Miller, 2003, p. 7) defined spirituality somewhat differently when they state that religious factors focus on prescribed beliefs, ritual and practices as well as social institutional features. Spiritual factors are concerned with an individual's subjective experiences, sometimes shared with others.

Yet another good definition of spirituality is found (Swinton, 2001, p 20.) "Spirituality is the outward expression of the inner workings of the human spirit...Spirituality is an intra, inter, and transpersonal experience that shapes and is directed by the experiences of individuals and of the communities within which they live out their lives. It is intra personal in that it refers to the quest for inner connectivity highlighted in the previous discussion on the spirit. It is interpersonal in that it relates to the relationships between people and within communities. It is transpersonal in so far as it reaches beyond self and others into the transcendent realms of experience that move beyond that which are available at a mundane level."

For my work in the spiritual checkup, I offer a simplified definition: Spirituality is the deep relationship that we have with ourselves, other people, the world, and God. This definition seemed to be comprehensible with the congregants with whom I have met.

Even though I want this spiritual checkup to focus on the spiritual, it is important to me to ground my project in religious traditions and forms that already exist in Judaism. This will give these spiritual checkups authority and authenticity. These traditions will obviously need to be reconstructed but there are significant precedents for what I am proposing in Judaism.

In Classical Judaism, a person is called upon every day of their lives to examine their deeds and to perform *Teshuvah*: personal repair. The Jewish calendar presents varying opportunities for spiritual and emotional growth. One of the goals of Jewish life in general and the Jewish holiday cycle in particular is to challenge the person to confront and examine various aspects of their human existence, personal relationships, and individual personalities.

In Classical Judaism, when is it most appropriate or normative to carry out a spiritual check up or accounting? Does there exist in Classical Judaism a cyclical basis for this kind of activity? Nowhere do Jews have more opportunities for spiritual renewal and reflection than in the forty-day period beginning with the month of Elul through the first ten days of Tishri, the period of Rosh Hashanah and Yom Kippur. Classical Judaism provides a precise process of introspection during the thirty days prior to the Rosh Hashanah, the Jewish New Year.

The medieval philosopher Moses Maimonides elegantly describes this process in his *Hilchot Teshuvah* with three stages of *Teshuvah*: regret, rejection, and resolution. Rabbis Kerry Olitzky and Rachel T. Sabath (Olitzky and Sabath, 1996) describe this as a three step process in their spiritual guide to the High Holidays: “We first feel sorry for what we did (and so we make amends); then when we are confronted with the sin again, we don’t repeat it (that’s how we know we really have repented); and finally we commit ourselves to a better life through righteous living.”

But, what seems to be the most important element of this process, really the beginning of this spiritual journey of the *Teshuvah*, is *Cheshbon Hanefesh*, the accounting of the soul: a life review, a period of deep personal introspection. The classic text is from the Maharil who writes: All the month of Elul (the month before Rosh Hashanah) before eating and sleeping let every man sit and look into his soul, and search his deeds, that he may make confession.

(Agnon, 1965 p 25) This comprehensive *cheshbon hanefesh*, to determine one's overall spiritual standing, is made only once a year, during the month of Elul. The end of a year and the beginning of a new one logically creates the proper atmosphere for serious introspection.

We find in the Mussar Tradition, a 19th century movement for deep ethical refinement, a text specifically dedicated to Cheshbon Hanefesh entitled *Sefer Cheshbon Hanefesh* by Rabbi Menachem Mendel of Satanov who writes:

Using cheshbon hanefesh properly means taking responsibility for thoughts, speech, actions, as well as possessions and opportunities. In order to take such total responsibility, it is necessary to crystallize a complete self-awareness. Due to its organizational effects, the overall benefit of this self-awareness is the development of the potential of all the good, which the Al-mighty implanted within the Creation that the individual is capable of bringing forth. The results of doing a proper *cheshbon hanefesh* are developing a fresh view of life, experiencing the excitement of making true conscious value judgments, and reinforcing the long-term goal of self-perfection.

Cheshbon hanefesh makes subtle emotional demands upon a person. It requires an honest evaluation of self and situation, and a desire for spiritual development. Ignoring these demands can cause a real internal conflict to arise. *Cheshbon hanefesh* can reveal attempts to cheat in life or chase after prohibited desires. The spiritual person faced with this revelation will confront these sensitive areas and work to improve and affect a real change of character. (Menachem Mendel of Satanov)

Although the High Holidays remain a central point of entry into Jewish life and community, I don't believe that deep introspection that should characterize this period is the normal experience for most Jews. In the non-Orthodox movements and faith communities, Elul is no longer the period of intense introspection.

Since, for many of my congregants, the full religious impact of the High Holiday self examination is not a reality, my goal in this project is to utilize the current structure now

associated specifically with the High Holiday period and to reframe it as an individualized *cheshbon hanefesh*. This would be in effect a kind of pastoral counseling follow up, to the ritual and liturgical experience of the High Holidays, which could be conducted throughout the year.

Using the secular ideal of a yearly checkup with our doctor, or financial planner, I will create an opportunity for my congregants to carry out this *cheshbon hanefesh* - a regular spiritual checkup with me. In one or two sessions, my congregants will come to me and reflect upon their spiritual state of being.

In Immanuel Etkes' ***Rabbi Israel Salanter and the Mussar Movement*** he describes how Mussar masters (the great 19th century ethical teachers) would hold sessions with their special students. "As stated above Salanter's Mussar educational activities were also expressed by providing personal guidance and advice....Among his finest students whom he knew to be vessels capable and fit to receive his influence, he gave of his very being, devoting time to speak with them and teaching them the way of God and of desirable attributes and to teach them to exercise prudence in the Torah in the pure fear of God." (Etkes, 1993)

What is particularly interesting is the fact that Salanter took care not to suggest fixed and rigid patterns of ethical correction to his students. He suggested that there is no one path and each person had to find his own way to spiritual perfection. Obviously, my spiritual checkup protocol arises from a different religious world than the 19th Century but there is a connection to what I am trying to accomplish. The Hasidic traditions have similar traditions of private time with the Rebbe where much is shared.

However two important elements seem relevant to my project. First, the centrality of the one on one encounters with the rabbi. The people who come to me are my disciples of sorts. I am their rabbi. I need to give them special time especially those who are spiritual seekers. Second, and more importantly, I need to be a witness more than a guide. My goal is not to move the spiritual checkup in any one direction but to enable it to be an opportunity for the congregant to reflect, to tell their own story, and to review their lives as it currently is and might ultimately become.

Rabbi Jack Bloom in his book the *Rabbi as a Symbolic Exemplar* articulates beautifully the symbolic power that a rabbi has. He refers to this power or status as *symbolic exemplarhood*. Because the rabbi is a *symbolic exemplar*, he or she is able to bless people; to name and by naming create new entities, to help people heal, to pray for others, to confer significance by symbolic presence and acts and to absolve guilt. Bloom is not speaking of magic nor is he implying that education, training and expertise are of no importance. Of course, rabbinic training and experience are essential. However, this symbolic nature of the rabbi used with integrity and humility is the source of rabbinic power. “These symbolic acts, coming from and appealing to an experiential non-rational part of our being, are potentially the most powerful tools a rabbi has.” (Bloom, 2003, p. 177-178) This symbolic stance is essential to the spiritual checkup. The rabbi is there to be present, to witness, to take seriously the journey that is being shared with us.

Carol Ochs suggests that our stories are essential to our spirituality or what she calls our informal theology. (How we relate and make sense of our world.) Ochs keenly observes that over the course of our lives that the stories change and are reformulated.

How we choose to tell our story impacts our understanding of life and our place in this world. Ochs suggests that we ultimately see our personal story in the master stories of our tradition. (Ochs 2001, p.33) This is compelling and perhaps the next phase of an ongoing spiritual relationship with my congregants but not the central focus of my spiritual checkup. My goal is more limited: to create a conversation where a person can begin to tell their story, to evaluate their journey, and to find new possibilities for moving forward.

B. Clinical principles including relevant literature that clarifies and supports these principles.

This project is clearly framed within the standard protocols of pastoral counseling. Creating a safe environment where the congregant can feel secure and relaxed is essential. The issue of confidentiality is always important. This spiritual checkup is no different than any other pastoral counseling situation. People need to be reassured of the privacy of this encounter. No one will know what transpires and no information will ever be divulged.

All the insights of psychodynamics are cognizant in the spiritual checkup. Transference and counter-transference are present in all counseling situations. Ann Akers offers a definition of transference that is relevant. “The term transference can refer both to specific feelings carried into the present from the past (e.g. awe, fear, affection or anger at authority) as well as generalized needs that persist in the present because they have never been met (e.g. needing to feel special and using the congregational setting as the latest venue for this life long quest.) (Ahlskog and Sands, p.118) To what extent the transference will be negative or positive will certainly impact the encounter. I must be aware of this and deal with it in appropriate way.

Clearly the issues of boundaries are important as well. This encounter is an intimate and intense situation and it is important that the rabbi be aware of the need to maintain healthy boundaries for the mutual safety and protection of both rabbi and client.

Most significant is the issue of counter- transference. Material will arise that will be surprising, that will trigger in me strong emotions and memories and even frighten me. Awareness of the issue of counter- transference will enable me to be open and not distracted by my own internal dynamics and personal issues.

It is also possible that this spiritual checkup will be a pretense or entrance way for the congregant to deal with a specific problem. The session might become crisis counseling. This is not a failure but one of the potential benefits of this kind of project. The spiritual checkup legitimates a person coming to see the rabbi. As the checkup unfolds, it might become clear that further pastoral counseling is necessary or that referral will be in order. Again, this is not the primary purpose of this checkup but it certainly would be a positive outcome of it. Some people need pastoral counseling but cannot find a way to get through the door. The spiritual checkup normalizes the visit to the rabbi's office.

Many of the clinical principles under girding my project are rooted in the most fundamental teaching of our *Postgraduate Center for Mental Health* training. Gary Ahlskog teaches and writes about the fundamental pastoral counseling stance. "The fundamental counseling stance consists of undivided attention to the client's concerns within an atmosphere of benign benevolence." (Ahlskog and Sands, 2000, p.13) Our benign benevolence is essential in the process. We are not there to judge their spiritual

checkup. We are not there to judge them or to give them advice. There is no judgment or direction. No consequences will be imposed upon them because of what they share or do not share. The most important pastoral counseling stance is benevolence. "A counselor's motives and focus centers on the client's best interests. This does not mean mindless "supportiveness" agreeing with everything or making all material seem "positive" It means that you harbor no agenda different from the client's growth and well being.

Dittes states it eloquently when he writes: "Pastoral counseling deals with the meaning that the events have for the counselee. The work of pastoral counseling is to explore and expand the meaning the counselee finds in the events. Pastoral counseling aims at the disclosure of self, not the closure of a problem". Dittes summarizes how I want to be in the moment of this spiritual checkup:

The pastoral counselor witnesses---steadfastly, undistracted, relentlessly the life experience of the counselee, the harried pilgrimage of a soul that has too often scurried in shadow. Lucid listener, the counselor beholds what's been averted, attests to what has been dismissed, hope and shame alike. Intervening would be easier and more familiar. Witnessing is a rare and strenuous gift. Intervening would put counselor and counselee in the familiar world of negotiation, the fencing of conditional and guarded trust, the marketplace of affection; Witnessing situates counselor and counselee in a world that transcends the frenzy and the fencing. It calls the bluff of habitual posturing strategies and maneuvers; it renders them meaningless. It says, "What counts is what I see. It counts for being visible and envisionable, not for being, right, familiar or easy." (Dittes, 1999, pp. 57-58)

However, this spiritual checkup must have a quality that is different than going to psychotherapist. If it is not any different from psychotherapy, why come to see the rabbi?

In my explanation of my method, and in my discussion of the project, I will deal with this tension more clearly.

Chapter III: Method for Caring Out this Project

A. The approach and procedure taken to implement this project.

The mechanics of the project are simple. I will explain this spiritual checkup project to my board, to my colleagues, and through the bulletin. I will also solicit people who I believe will be open to this kind of project. Ideally, I would like to carryout at least 5 spiritual checkups in order to evaluate this process.

I will establish times when these appointments are available. I believe that the spiritual check up will take one or two sessions. The appointment will be set up directly with me to preserve confidentiality. I believe that no spiritual checkup session should last more than an hour. Thus, with two potential sessions, we are utilizing up to 2 hours for this encounter.

The setting will definitely be in my office and I would prefer to create a situation where we are face-to-face rather than speaking to the congregant with me sitting on one side of my desk and the congregant sitting on the other side.

Developing the questionnaire has been the most difficult part of the process and I believe that it will go through further refinement before I actual carryout this project. Surprisingly, my spiritual checkup is loosely based on Spiritual Assessment Guidelines composed by a Lutheran Parish nurse. We have communicated and she was encouraging of me to alter her spiritual assessment for my purposes. (Schnorr, 2008)

Once the congregant has made an appointment, I will send them a copy of the spiritual checkup. They do not have to fill it out but I want them to know what the nature of checkup is. I don't want it to be mystified or scary.

The question of an opening with a prayer is a complex one. My initial instinct was not to begin with a prayer. I did want to impose a theological veneer to this encounter. People can react to a variety of ways to prayers. Obviously our coming together is a holy act.

However, after giving it further thought, a simple prayer to frame the experience and to create a sense of spirituality would be appropriate. (There might be situations when I judge that a prayer would be counter-productive and just a period of quiet time would be sufficient. I will have to make that judgment on a case-by-case basis.) If I use a prayer, Naomi Levy's prayer "A prayer for living up to the best in our souls" would be wonderful and appropriate.

You have Blessed me with many gifts, God, but I know it is my task to realize them. May I never underestimate my potential; may I never lose hope. May I find the strength to strive for better, the courage to be different, and the energy to give all that I have to offer? Help me, God to live up to all the goodness that resides within me. Fill me with the humility to learn from others, and with the confidence to trust my own instincts. Thank you, God, for the power to grow. AMEN

There will be four rules: first, complete confidentiality in all aspects of this spiritual checkup. Second, there is no right or wrong answers. This checkup is snapshot of where they are at this very moment. Every person will answer differently. That is what makes it interesting and useful. Third, for whatever reason, if a person does not want to answer a question, they should just say they would like to skip it. (However, I might gently probe why this question is

particularly difficult to answer.) Fourth, we define spirituality as the deep relationship that we have with ourselves other people, the world, and with God.

Questions for Spiritual Checkup with Rabbi Londy

1) Current Situation

- a. What are the things that you are most happy about in your life?
- b. What things bring you the most discomfort or difficulty at this time in your life?

2) Meaning and Purpose

- a. Do you believe that your life has a special purpose?
- b. What activities help you to accomplish your purpose in life?
- c. Is there something special you want to achieve that remains unfinished?

3) Love and Relatedness

- a. What is (are) your most significant relationship(s)?
- b. How would you describe these relationships?
 - i. Which ones are most satisfying?
 - ii. Which ones are most troubling
- c. What are your main support systems?

4) Forgiveness

- a. Have you ever experienced feelings of guilt, anger, resentment, and/or bitterness?
- b. If so, what effect do these feelings have on your sense of wellness?
- c. How do you handle these feelings?

d. What prompts you to forgive others?

5) Hope

a. Would you describe yourself as hopeful?

b. Have you ever felt hopeless? If so, describe the situation.

c. What resources do you use to obtain (maintain) a sense of hope?

d. Are there other resources that you could use to obtain (maintain) a sense of hope?

6) Life's Journey

a. If life is a journey with its ups and downs, with what at this moment are you most satisfied?

b. Are there areas where you feel stuck or have gotten off the track?

c. Have you thought about how you could overcome these obstacles?

7) Source of Spiritual Strength

a. Who or what is your source of spiritual strength?

b. If your source of spiritual strength is God, how do you describe God? What does God mean to you?

c. Has your relationship with God changed over the years?

d. Have there been moments when you have felt a special connection with God

e. When have you felt especially alienated from God

f. Does your relationship with God have any effect on the quality of your life?

8) Final Question:

- a. Is there any way that I as your rabbi can help you to deal with the challenges that you face in your life?
- b. What is the most important thing that you will take away from this experience?

If I am so concerned with not artificially imposing religious ideas into the spiritual checkup, have I diminished myself and the ultimate impact of this project? My answer is no. I believe that these questions are essentially Jewish questions framed in non-theological terms. The congregant is responding to them in dialogue with the rabbi. But, that being said, my reactions to what is being shared will hopefully be carefully and judiciously laden with Jewish values. I intend to intersperse “sparks” from Jewish tradition appropriate in our dialogue. The key issue for me is to balance my rabbinic role with my role as listener, allowing the congregant to create his/her own theological story. Here are just some examples of the kind of responses that will frame the encounter as a spiritual event.

For example, in the question dealing with what is currently uncomfortable in the person’s life; it would be appropriate to mention that great figures in Jewish tradition such as Abraham, Sara, Jacob, Joseph, and Ruth went through moments of struggle but in the end triumphed.

When discussing the issue of the congregant’s special purpose in life, it is important to remind the congregant that each of us is created in the image of God or to quote a statement from Heschel dealing with the need for us to make a leap of action that ultimately gives meaning to our lives. When discussing something yet to be accomplished in the congregant’s life, speaking of Abraham beginning his journey at 75 seems appropriate.

I believe that the issues relating to forgiveness will be central to the spiritual checkup. In that discussion, Harold Kushner story on Forgiveness would seem very appropriate.

A woman in my congregation comes to see me. She is a single mother, divorced, working to support her and three young children. She says to me, "Since my husband walked out on us, every month is a struggle to pay our bills. I have to tell my kids we have no money to go to the movies, while he's living it up with his new wife in another state. How can you tell me to forgive him?" I answer her, "I'm not asking you to forgive him because what he did was acceptable. It wasn't; it was mean and selfish, I'm asking you to forgive because he doesn't deserve the power to live in your head and turn you into a bitter, angry woman. I'd like to see him out of your life emotionally as completely as he is out of it physically, but you keep holding on to him. You're not hurting him by holding on to that resentment, but you're hurting yourself." (Wiesenthal, 1997, pp.185-186)

More of these "sparks" from tradition will be introduced when I believe that they are appropriate.

B. Methods Utilized to Access Outcome and Success of Project

It is difficult to evaluate this project. However, here are some of my considerations about evaluation. First, how many people will actual take me up on this? If I have five people who are willing to do it, I will feel successful. Second, will this be a topic that is spoken about and become part of the "buzz" of the congregation? Third, I must objectively analyze the encounter. Was the conversation free flowing? Were people forthcoming and honest? Was there some undefined hesitation on the part of the participants? Fourth, did the encounter seem safe? Was I able to restrain my desire to probe and just witness what was being shared? Fifth, did I come away surprised by the encounter. Did issues come up that

surprised me or revealed to me a different understanding of the spiritual life of my congregants than I expected. Sixth, were we truly able to come up with some kind of mutual reading of the person's spiritual life that seemed enlightening and helpful to them? Seventh, did my encounter open the door for someone to speak to me about a personal problem that they would not have done without this special opening. Eighth, is this a protocol that could be useful to other clergy, both Jewish and non-Jewish? Ninth, did the spiritual check up impact in any noticeable way the person's involvement in religious life?

Chapter IV: Results:

A. Description of Outcomes Based On Project Structure Originally Proposed

1. Introducing Project in the Synagogue System

Introducing the project into my congregation was easier than I first imagined. Although I was confident that the project had validity, I was uncertain whether it would be feasible in my specific congregation. First, I sought the support of my senior rabbi. I did not want him to feel discomfort with this project. Spiritual checkups placed me in the role of pastoral counselor to a higher degree than I was currently perceived. As the rabbi/educator of this congregation, I have some rabbinic and pastoral duties. However, this is not my primary responsibility at this time. Second, in my two and half years at Temple Israel the topic of spirituality has not been prominent in the synagogue culture. Our synagogue is going through a great transformation. Most of the creative energy is being utilized to improve the school, to refine the liturgical life of the synagogue and to create a variety of programs so that the synagogue can be conceived by the members as a place of great activity. Being located on the Upper East Side of the New York City, the lay and rabbinic leadership believe that these are the priorities of the synagogue. The congregation also has just completed a year and half project to write a new Torah. This project has been a focus of much activity and creativity in the synagogue. Third, I did not perceive openly in the synagogue's activities that that our members desired to explore, in depth, their spiritual life. Movie programs, concerts, and lectures on contemporary events are popular. However, in the times when other programs have been offered such classes on the Jewish view of death and dying or an introduction to the sacred texts of Judaism, the attendance has been minimal. The one real exception to this is a

weekly Saturday morning Torah class that is offered an hour before services. There is a loyal group that never swells to more than a dozen people and the class is taught predominately by the senior rabbi. Third and most practically, would people sign up for this project? Would they find it interesting? Before I even began the actual spiritual checkups these concerns had to be addressed.

I was wrong when it came to the support for the project. On multiple levels, the synagogue supported this project. First, I met with the senior rabbi and explained to him in detail what I was trying to accomplish. He did not think that this should be advertised in the bulletin. He felt that if I was unable to carry out the spiritual checkups with all of the people who requested it, it could cause difficulty for me. I asked: "Did he know people who he thought would be interested in undergoing a spiritual checkup?" He was more than gracious in offering a list of people he thought might be interested. Some of them I pursued. Others I did not. He understood that there was need for privacy and thus he offered his office if I needed to utilize it for the checkup. This was very gracious but I felt uncomfortable with this offer. I believe that the clergy's office is sacred and thus my conducting the checkup in his office might send two wrong messages: first, that this was a program that somehow was connected to the senior rabbi and second that I did not fully own this project. It was important to me that this project be associated with my rabbinate and directly with my work on the Doctor of Ministry program.

In addition, the senior rabbi suggested that the spiritual checkup take place in the chapel before the ark. I liked this idea very much because it reinforced the sanctity of this project. This spiritual checkup was not to be like any other encounter but hopefully a holy dialogue. But for practical reasons, this suggestion did not work out. There was no way to

insure that these spiritual checkups would not be disturbed. However, the support of the senior rabbi was essential for me to continue with this project.

More importantly, I met with the President of the synagogue. She felt that this project filled a deep need in our congregation that was not currently being met. She understood that this project intended to deepen the spiritual conversation among our members. I reiterated to her that our congregation succeeds greatly in offering wonderful events and programs. But, I sought to dig deeper and to try to help people explore where they were on their spiritual journey.

She pledged to assist me in this project. We wanted to bring this issue to the Board of Directors hoping that not only would the board be interested but some would seek to undertake this spiritual checkup. She also suggested that I solicit the Education Committee which already had a strong bond with me and would be likely take part in this kind of endeavor. I was in Israel while this issue was presented to the board but both the Chairman of the Religious School Committee and the President of the synagogue spoke encouragingly of this program. The report that I received about this discussion was that there was great enthusiasm about this project.

An added bonus to my potential pool of candidates was the support of the Assistant Rabbi, who was intrigued by this project. This past fall, she introduced a program called, *A Learner's Circle*, which is intended for women who have never become Bat Mitzvah. Her class is no more than 7 students. However, she heavily promoted this program to her class.

I composed a letter that stated my project that was shared with some members of the Board, my Religious School Committee and members of the Learner's Circle.

Thursday, January 29, 2009

Dear Friends:

I need your help. For the last five years, I have been pursuing my Doctor of Ministry in Pastoral Counseling at a joint program sponsored by the Postgraduate Center for Mental Health and the Hebrew Union College-Jewish Institute of Religion. This program provides clergy of all faiths with advance training and certification in pastoral counseling. The program includes two years of extensive course work, on-going supervision, seminars synthesizing psycho-dynamic theory and theology, and group therapy. I have passed all of my course work and exams and am looking forward to completing this degree.

In order to finish my degree, I need to complete a final project related to my rabbinate. My final project is entitled: The Spiritual Checkup as a Means of Pastoral Counseling. My goal is to create a protocol for congregants to sit with their rabbi on a regular basis to do a spiritual checkup. I have sought a project that will create new opportunities in my rabbinate to interact with congregants in a positive, and tranquil way that will bring to the congregant greater understanding of who they are as spiritual beings; and hopefully to create a structure that will promote the essential goal of religion: to help us grow as people and to become better human beings.

I need congregants willing to carry out the spiritual checkups with me. I would be so grateful to carryout a spiritual checkup with you. It involves receiving in advance a set of questions. You don't have to write anything but I do not want anyone to be surprised by the questions. We will set up a mutually convenient time for a private, one-on-one spiritual conversation based on the questions that I have written. It will be completely confidential and hopefully very enriching.

My only limitation is time. I want to do several of them as soon as possible because I need to complete my project by March 23. I would be so honored to have you participate in this project. To make it more complicated, I will be in Israel from February 5th through February 17th. Please call me for more information and hopefully to set up an appointment to carryout this Spiritual Checkup.

Cordially

Rabbi Alan Londy
718-924-9115

2. My First Two Spiritual Checkups: A Period of Adjustment

First checkup: Graham

An email was sent out but I then I began my own solicitation process. I called upon a man in our congregation who had taken one of my classes. He is a very narcissistic, high powered investment person. After I explained the process to him, he agreed to do it because he “wanted to help me.” We did it in the conference room of his plush office in downtown NYC. By nature, this man likes to be in control, but we spent an hour and quarter going through the questions. He had a copy of the text as did I. It was a good first attempt. He revealed interesting things about his spiritual journey. He had spent a great deal in his life trying to resolved issues with father. He had a deep sense of love for children first and his wife second. He was proud of increasing openness that his youngest son had towards him and commented that his wife was very independent. He described the fact he had a close circle of very dear friends. But, when asked about the issue of forgiveness, he stated directly, in most cases he would just cut the person off. Besides his love of his family and pride with his business, he received a great deal of enjoyment through his charity work in the Jewish community. In business, he felt a special satisfaction with his ability to connect people who would benefit professionally by meeting. He did however admit that at this time his investment business was at a stand still and he said, “whatever ideas that I try do not seem to work.” When it came to his spiritual life, ideas about God interested him but did not resonate with him. His Judaism was involvement in community. He has a strong sense of Jewish peoplehood and received his sense of spirituality through his love of Judaism. My stance in the meeting was passive. I did a lot of listening and conducted very little follow up. The protocol was followed meticulously. He benefited from the experience and encouraged me to

continue with the project. But, he did say that greater response to him during the spiritual checkup would have been beneficial, but since he had been in therapy for so many years the clarity of his responses really did not need to a response. This constructive comment influenced me as I continued my spiritual checkups.

Second Interview: Barbara

The second interview was more complex. Barbara is a former officer in our congregation who had been involved for many years: from the time her children were students in the preschool. She has been married for at least 15 years to man who grew up in the congregation but who is marginally involved. Barbara is from Oregon and grew up in small town with no considerable Jewish presence. Both parents were Jewish but had no connection to the Jewish community. However, she was raised with a sense of Jewish pride. None of her siblings have married Jews or are involved in Judaism. She has two sons, Stephen, 13 and Alexander, 10. Her older son had leukemia as a young child. But received the best medical care and has been cured. In addition to her extensive work in the synagogue, she has pursued a MSW and is now receiving advanced training in Family Therapy.

The session unfolded strangely. She arrived 20 minutes late. I am not certain how to interpret this, but I was feeling that she was anxious about the process and I interpreted it as resistance. We did our checkup in the main Sanctuary on the pulpit but it was cold in the sanctuary. However, she seemed to be fine with the location. I felt that the checkup was rushed and I was suspicious that she had set it up this way. As a therapist, she knows how important keeping within the time framework is as part of the structure of the encounter.

She had a copy of the questions and we went through them together. The overall theme of the spiritual checkup was the dissonance between her work and connection with the synagogue and her sense of comfort with religion and spirituality.

She has a deep love and connection to the synagogue but she does not think of herself as religious in any way. Being in tune with her feelings, she was able to articulate the normal ambivalence and contradictions that she experienced in her life. At this moment in her life, her family, her husband, and the new direction of her professional life as a family therapist were the most positive aspects of her life.

As the Temple Educator, I had dealt with her husband and her about the acting out of Stephen, her older son, who was a cancer survivor. Stephen's role in the family had caused a great deal of stress. Seth, her husband, reacts to Stephen with great frustration and reactivity, and this creates tension. Barbara has tried to encourage him not to be so reactive, but this is clearly a stressor. Other family problems weighed on her especially the fact that her father is in the early stages of ALS. In addition, she expressed her general struggle as a person to be more open. Although a very pleasant and friendly person, she gives the impression of being very careful and controlled in expressing her feelings. After speaking with her, it is hard to completely comprehend what she is truly feeling. She is guarded.

She does not think that her life is having a unique purpose but she is proud of her work with the synagogue, as a mother, and as a synagogue leader. Her new career move, taking a more active role as a family therapist, has given her pride and a new and fresh view of her life. She believes that this development is moving her in the right direction.

When I inquired about whether she felt that something remained unfinished in her life, she was not specific about this, but she did express her desire to be more openhearted. She

said that she had the tendency to be emotional reserved because her family of origin, which was loving, was not very emotional or demonstrative with their affection. On the other hand, her husband came from a very emotional family. He had helped her become more open verbally with her feelings.

Her husband, children, and parents are her most important relationships. She is not close to her siblings. At this juncture in her life, she is proud of the fact that her relationship with her husband has deepened. Her most satisfying relationship is with her husband especially because of a deeper intimacy that they have been able to develop. They have found new ways to do things together especially their mutual love of classical music.

Paradoxically, she thinks that her extended family is the most challenging relationship. She reiterated that she would like to have a more openly loving relationship with her mother and father. She now says “I love you” to her parents and siblings and it feels better but it seems somewhat odd to her parents who are not use to this kind of open affection.

We discussed the issues of guilt, anger, resentment, and/or bitterness? She spoke about jealousy. Her world, especially the synagogue, is a money culture. She was thinking of buying another apartment, which would give her a second floor. Seth humored her, but in the end she realized it was not a good idea. The money would have been a problem. I responded with the Jewish teaching from Pirke Avot about happiness being satisfied with what we have. Barbara is financially well off from a wealthy family. However, she was candid in expressing that she had been jealous of others who had more resources. Nevertheless, she has learned to resolve this issue especially in light of the new economic realities of our world. But, she could not deny this sense of resentment and jealousy

She was not able to describe whether she was hopeful or not. However, when I asked her about being hopeless, she described an event that had recently shaken her up. Last year, a woman, her age, who was mother in her older son's school, became sick and died. She was very distraught by it. Watching this happened pained her. It also generated her own existential fears about death and the meaning of life. In response to this, she went on antidepressants. She was so overwhelmed that she did not even think that she would be able to fulfill an important professional speaking engagement.

We spoke of the issue of her life journey, its ups and downs. In this context, with what at this moment was she most satisfied? Even though she is not as active in the synagogue as she used to be, she reiterated her temple work and her social work. As she was presenting her story to me, I was struck by how bifurcated she saw her life. The temple was one part of her life; her professional work was another. She was dedicated to both but they did not connect in her life.

I felt a need to respond and help her to reframe how she saw her life. I suggested to her: "Don't you see the connection between the two? You are a peacemaker in the synagogue. You listen and bring people together. You have guided us through some difficult moments. As a social worker, you seek to heal families. Don't you see the connection between the two?" She had never seen it that way and she seemed moved by this.

Was there an area where she felt that she was off the track? She referred back to her depression when her friend was dying and also when her son was so ill. However, she did not speak of that with any great detail. (However, I was aware that her son's illness was a catalyst for her coming more involved in the synagogue.) How could she feel less stuck? She

believed that therapy, her own work, and her own ability to reflect had helped her. She valued in herself that she seemed to be evolving into a more open person.

Time was running out and we had not gotten directly to the issue of her spiritual life and relationship to God. I asked her what her relationship with God was. She said it was unclear. But she quoted the statement of her dad that “there must be something greater in this world that has brought the world into being.” However, I knew that this area would need more discussion. I asked her: was this a worthwhile experience? She said definitely yes and then said: “when can we do this again?”

Barbara wrote me an email several hours after our spiritual check up. It read as follows:

Something you said and wrote to me resonated, this idea that our spiritual being is active throughout everything we do and we shouldn't think about it only in terms of the temple (that's my interpretation). I've always had a divide between my temple life and my other social life- there is very little overlap. But I do see overlap in the spiritual aspects of my life (spiritual for me being not only religion but how I behave, what drives me, my desire to understand myself and the world better and to be open to more things.) I found this very thought provoking and while I have a lot of supports in my life I believe that this is an incredibly powerful tool to reach out to others who may not be in crisis but may be struggling to find their way and need some direction. You've got a real supporter in me for this effort!

I felt truly bolstered by this reaction but now the hard work began of continuing these spiritual checkups with a variety of interesting congregants with complex stories and real internal struggles.

3. Who came for Spiritual Checkups?

The people who came represented a wonderful cross section of my congregation. Here are brief descriptions of who these people except for Graham and Barbara who have been described in great detail:

Terry was a 60 year old woman who loved her children but who was struggling with an intense sense of loss. As her story unfolded, with tears flowing from her eyes for an hour and half, she affirmed that she had lost hope and that loss dominated her worldview.

Victoria was a 40 year old happily married woman with two children who had a profound love of her family and her children and felt especially grateful that her grandparents were still alive.

Gina is a young woman in her mid-thirties who has two children and a loving husband. She has become very involved in Jewish learning in the synagogue over the last 3 years and struggles with which direction her life should take her.

David is a 47-year-old man who conquered drug problems at an early age. He went into the family business; starting from the very bottom and rising to great success. However, at this moment in his life, he seeks independence and growing need to feel connected to the synagogue.

Joan is a single, extremely bright woman about to turn sixty who is nurtured by a loving extended family. She works in the family business which has given her security but she longs for a male companion and finds meaning in her life.

Sylvia is a 52 year old mother of a teenage child. She describes her life as a long journey from days of drugs, sex and rock'n'roll in to a much more establishment role. She

expressed a sense of faithfulness that was somewhat unique among the congregants who came for a spiritual checkup.

Laura is a woman in her late sixties who presented herself by her appearance initially as a successful businesswoman of the Upper Eastside of New York. But, as her story unfolded, she revealed a personal story of insecurity, and fragility. She clearly had difficulty sustaining relationships and now looked to the synagogue for healing.

Evelyn was a woman in her early forties highly dedicated to her family and synagogue but expressed restlessness both personally and spiritually. She expressed a desire that she still felt that she had not found a role in life where she would make a difference.

Christina, non-Jewish woman in her late sixties who works with pre-school students in our school, shared with me a hidden part of her life that no one else in the synagogue was aware of. However, she was most clear about how faith and her relationship with God sustained her.

Evonne is a young 25 year old woman living in the US from Brazil who works as Cantor in a neighboring congregation and was referred to me by a rabbinic colleague. She struggled with finding a way to live a life of independence. Although she was a spiritual leader, she was unable to speak with any sense of clarity about her relationship with God.

4. Excerpts from the Remaining Spiritual Checkup

It is impossible to report in detail on each spiritual checkup. They were long and often complicated. (Some went way over an hour. My last one lasted two hours.) I did not take notes, but after each session, I wrote down important things that I remembered and

seemed to be particularly significant. However, I want to share some of the interchanges that arose from specific questions from the protocol.

In order to do this, let me utilize some of the key questions of the protocol to reveal how the sessions evolved in specific cases in response to a particular question raised by the protocol. Hopefully, these excerpts will reveal some of the richness of spiritual journeys that unfolded in these sessions. I am giving examples from all of the major questions of the protocol and I have selected questions that seemed to frame a specific issue in the spiritual checkup. I also try to provide a sense of how I responded to the material being presented to me.

- a. What are things that you are most happy about in your life?

What things bring you the most discomfort or difficulty at this time in your life?

Beginning on this positive question was a good opening and then turning to something that brought discomfort or difficulty was an effective device for nurturing the spiritual discussion. Many spoke about the love of family as making them most happy. But, there were interesting tensions that were particularly important as the person undertook the spiritual checkup.

Terry, the sixty year old mother of three grown children and wife to a 92 year old man, had a deep love of her children. Speaking of them brought tears to her eyes which flowed during the entire session. I literally needed to get up to find her a box of Kleenex so that she could continue. She immediately felt safe in our meeting and was not guarded at all. Her children and their happiness was what made her most happy in life. However, this happiness had been subverted by a series of painful events. Her young daughter had twins, one was born

still born, and the other died three weeks later. Her son and his wife had a miscarriage at 7 months. This had shaken her sense of security and well being in this world. She also worried about her 92 year old husband (second husband) who seemed to be failing. She had lost friends to illness. Loss dominated her entire being. When she was asked what remained unfinished in her life, she stated that she wanted to see her children happy. She also showed a great deal of resilience when she joined her daughter who had lost the twins, in creating a breast milk bank in NYC.

Laura, the professional woman in her sixties, answered the first two questions in a way that established an emotional pattern or feeling in the checkup that was consistent throughout her entire sharing of her story. She valued close, relationships with loving people but she was most troubled by people “who are hurtful, who push me away, and who do not accept me.” This sense of hurt and rejection was the foundation of the sense of incompleteness that she felt in her life. She was fearful: professionally she wanted more success, she wanted to stop worrying about economic issues, and she would like a relationship with a significant other and a nice home. She emphasized several times the issue of a nice home that I interpreted as her need for roots and security. Laura wanted to feel safe and comfortable in this world and had not achieved it.

The goal of the spiritual check up was not to pathologize a person’s life. In fact, I will later speak about how important it was not to try to see everyone has having some pathology that needed repair. But Laura’s spiritual checkup did raise for me issues of a character disorder. I felt as she presented her story that there were borderline aspects to her personality. Patricia Hertz describes the borderline spectrum in the following way: Individuals with borderline personality disorder usually have relationships characterized by instability and

great intensity. , ...as their need for attachment to others fluctuates with their need for distance. (Berozoff, Flanagan and Hertz, P.311) She was unable to describe any significant relationship locally but only with a brother and cousin who lived out of town. People continued to disappoint her. Her older sister had disappointed her. She was the caretaker for her father and the other siblings were too busy to assist her. She took the lead in her father's care and when she asked for help, she did not get it. She shared that she had come from a negative family where she was often criticized. She always felt that she was being taken advantage of .She had been most hurt by her family. How did she describe what at this moment gives her the most satisfaction? She felt that she was taking steps to change herself. Joining the synagogue and taking a synagogue class was important to her. "I seek to have the courage to become me." Her spiritual connection was a tough topic, but God meant to her belonging. The community was potentially healing and a means for her becoming closer to God. I encouraged her desire for change and I suggested that perhaps God was the power that she was finding in herself that makes all these new steps possible. She was intrigued by this. She said explicitly that she felt alienated from God when she felt stuck and was not taking the initiative to move forward. I felt a great need to affirm her; to give her strength. I encouraged her by saying that she needed not only to look at where she feels stuck but also to affirm all that she is doing to move forward. I referenced the story of the crossing of the Red Sea when Jews panicked at the Red Sea, but Nachshon was willing to have the faith to jump in and thus begin the redemption. She should not minimize the power of taking small steps.

b. Do you believe that that your life has a special meaning?

This question was not easy for anyone of the congregants. "What do you mean, Rabbi by special purpose?" My answer was always: "Define it any way that you like." Two young

women, found this question to be particularly difficult to respond to because they felt conflicted by the mixed messages that they received in society about what it means to be a successful woman in this world. Evelyn, the devoted mother of two in her early forties volunteers her time to the synagogue with great diligence. However, she has not always felt that she is to be listened to. These volunteer roles clearly were not enough for her. Although she enjoyed her life as a mother, she was still searching for a higher purpose beyond parenting. She still sought a special purpose for her life but had not yet found it. When asked about something unfinished, she stated that she wanted to make a difference. A social worker, a doctor, or some other important person in society was an example that she gave but she feared that time was running out. When asked later on if she felt stuck in some way in her life, she came back to the same theme. She did feel stuck and was not sure what she really should be doing with her life.

Gina, a mother of two young children, in her late thirties, who was recently let go from her job, faced similar difficulties. The question of her life having a special meaning was not easy for her to discuss. She initially said no, but added that raising her children was important. However, she felt very conflicted about this whole issue. She put it this way: “Am I allowed to feel satisfied as being a home parent or must I go into the market place and have a career?” What was so interesting and affirming was how she had shifted her energies to her own spiritual journey. She had grown up in a family where girls received no formal Jewish education. Her being part of the adult Bat Mitzvah class was an important goal for her which she perceived as a vital goal in her life now. It was not a career but it was something that she wanted to achieve. The way her connection with our spiritual community helped her to deal

with this tension in her life showed me that her personal journey which included a career, and her spiritual path, were intertwined.

Joan, a single woman close to sixty, had a different take on the issue of her special purpose in life. Her special purpose was to live a life of integrity. “I have taken the life given to me. Some things I feel in control of and others I feel are beyond my control. I sometimes think that I could have taken another path. But I look forward.” She is a lawyer by training but ultimately went into the family business. “I am very bright and wonder if I could have made other choices. But I am at peace with the direction of my life” She also struggled with the issue of children. Did she have a special purpose to have children? She approached it this way: “If I had really wanted children, I could have adopted or been a single mother.” She valued her sense of freedom, but I was not sure whether it was real or just a rationalization. In response to the follow up question from the protocol: what activities help you to accomplish your life’s purpose? She was passionate about her charity work, her involvement with synagogue, and just trying to live with a sense of thankfulness.

As I listened to her, I came to the conclusion that I should suggest another perspective on her life. To me, all of her life choices, and her integrity and strength were all indicative of a life journey filled with hope, trust, and faith. The word spiritual made her uncomfortable. She did not see her strength and hope as rooted in God. She really was not sure about spirituality. I responded with affirming the definition of spirituality as a deep relationship with self, others, the world and God. For her, community is where she experiences God.

But when I asked her, if she ever felt a special connection to with God, she spoke with emotion of the death of her mother. She went on to speak of her fascination with life after death? Is there something else? But the most intriguing part of her story was the sense of

guilt she held on to about her mother's death. She was there when her mother died but had forgotten to say the Shema. She had not always been there during her mother's final days. She viewed her involvement in the synagogue's Torah writing project as "an important way for me to respond to the guilt that I felt." This project became an instrument for her healing.

I tried to frame her story in the following way. I spoke about the fact that I experienced her as a faithful person. I said that you live with integrity, have a sense of hope, express gratefulness, feel satisfied with your life and possesses a general sense of confidence. I suggested that she might want to contemplate that we experience God in our lives not necessarily directly but through how it impacts our lives. She ended up liking this idea of faithfulness. She was going to take it with her because she never saw herself in that way.

I was particularly interested in the issue of which relationship people found the most troubling in their lives. Evelyn described that her most difficult relationship was with her brother who was very different from her. She describes of coming from a very dysfunctional family. Her parents were divorced when she was young and she was triangulated in her relationship with them. Sometimes she and her husband are not on the same wavelength and she was disappointed by friendships that had evaporated in the synagogue.

Gina had difficulty with her brother. They were extremely different from each other. They had contact but it is exasperating to Gina. Barbara, as I have described above, felt that her most troubling relationship was with her family. She loved them but she wanted a more openly loving relationship with her family. She had come to a point in her personal growth where saying I love you to her parents and siblings felt comfortable and good. Terry felt hurt by her relationship with her stepdaughter whom she felt had slighted her at her step grandson's bar mitzvah by not calling her to the Torah.

Joan found her most troubling relationship with her ex-husband and had never come to grips with the fact that her mother and father were dedicated to the family business at her expense. Her father was absent, and her mother was a professional woman. “I did not grow up with a great sense of warmth within my nuclear family,”

Sylvia also described alienation from her parents and brother. And she shared with me a sense of sadness of how her mother was verbally abusive and physically abusive to her father. What was so frustrating was the complete denial of these episodes when she had tried to explore them.

For David, his relationship with his brothers and very controlling father was the most troubling relationship. It was complicated by complex business relationships within the family business.

My goal is not to be repetitive but it is amazing to me that practically every one of my congregants who came for a spiritual checkup saw family relations as the most difficult and painful. I listened carefully and did not comment. But, at times, I validated this painful part of their lives by reminding them that patriarchal stories of the Torah are filled with problematic family relationships. Abraham, Isaac, and Jacob...Sara, Rebecca, Rachel and Leah were not one big harmonious family. The Torah wants to remind us that negotiating these family relationships will not come easily but is the natural part of so many of our lives.

c. *Have you ever-experienced feelings of guilt?*

I found it remarkable how candid people were about their sense of guilt. Evelyn had cut herself off from her father who continued to try to use her and manipulate her. In spite of this, she bore a strong sense of guilt. Her reasons for remaining separate from him were totally logical but her guilt remained.

Gina felt guilt for not working to improve her relationship with her brother. As I referenced above, Barbara felt guilty about her feelings of resentment that others had more than she did. She wanted a new apartment but knew this was not the time to stretch her family's financial resources. Terry was the caregiver to her brother as he was dying. Terry felt guilty that deep down she resented it. Her external altruism did not match her internal resentment. She was conflicted and I shared with her that this was not unusual and that Jewish tradition judges us by our deeds not by our thoughts.

Sylvia said that through her work with a West Coast therapist at an earlier stage in her life, she had come to the point where she was willing to let go of things. She sees difficult times, painful moments, and even feelings of guilt in retrospect as a necessary way to becoming who she is today. David felt guilty that he was not able always to control his impulses. He had a tendency to lose his temper. Even with medication, this has remained something that he felt guilty about when he lost control.

d. What prompts you to forgive others?

Most of the congregants when asked this question responded that they could forgive people in most situations who had done something without malice and who were willing to own up to it. Yet, the corollary for most people was the fact they would not forgive a person who does not take ownership of their misdeeds. Sincerity was a necessary factor. I pointed out to many of the congregants that their position was not inconsistent with Jewish views on repentance, which demands from a person that they admit their sense of responsibility and publicly proclaim their guilt. Evelyn articulated this most directly when she stated: "I am capable of forgiveness if it is sincere and if it is not repetitive."

However, for some, this was not so easy. Victoria, Yvonne, and David stated that towards some people forgiving was extremely challenging. Victoria believes that some people do not possess the self-awareness to recognize that they must ask for forgiveness. She freely admitted that she does not handle feelings like this easily. She often holds on to them and even internalizes them. These feelings even can impact their health.

Some congregants were not able to forgive. Joan said “it is difficult for me to forgive; I usually just cut these people out of my life.” This was the same approach taken by Graham.

However, the spiritual checkup did reveal some unique approaches to forgiveness. Terry stated that when she feels full (emotionally)...when she feels a sense of emotional wellbeing, she could forgive. When that fullness is missing, it is hard to forgive. Her comment made so much sense in the context of her own life, where feelings of loss and emptiness were so predominant.

Sylvia offered the most nuanced approach to forgiveness. A person needed to be sincere. However, some people cannot be forgiven because they will not take responsibility. Yet, she does not like to hold on. She tries to let go and see the greater picture that is unfolding in life.

e. Would you describe yourself as hopeful?

Have you ever felt hopeless?

What resources do you use to obtain hope?

I felt that this set of questions was essential for understanding a person’s spiritual journey. It was in this area that current events became especially relevant. Andrew felt hopeful in general, but the economic meltdown especially the Madoff affair had given him

moments of helplessness. However, he saw himself as the source of his own hopefulness. “It comes from within me. That is how I see it.”

Laura, who seemed most emotionally fragile, was not able to determine whether she was hopeful or not. Nevertheless, she felt that she was going through a process of renewal. She had become hopeless after 9/11. She had been going through an extensive remake of her career that literally ended on 9/10. The economic downturn after those events hurt her professionally. She admitted to being scared. However, she found hope by being with others who were experiencing the same thing. Her reconnection with Judaism through the synagogue made her feel accepted and loved. Being in the synagogue community really was replenishing her sense of hope even in these difficult economic times.

Joan spoke of being very hopeful but remembers the time when she was stuck in her marriage without hope. She could not really identify the source of her hope. She felt very blessed and she knew that if she really needed money she had real estate holdings that could be liquidated. However in the grand scheme her clearest source of hope was rooted in gratitude for her life and the constant support of family.

Yvonne, the 25-year-old cantor from Brazil, took a much shorter view, which perhaps was reflective of her age. She was hopeful in general but she became hopeless after a religious service that it did not meet her standards. It is also worth noting that she felt that she did not have a good support system. She needed to depend primarily on herself and her own inner resources.

Evelyn referred to herself as a positive person and generally did not feel hopeless. However, a recent medical scare had her very frightened. I asked her: “how did you recover

your hope? Where did it come from?" I probed and asked her, "does it come from within...does it come from God? What did she think?" She was not sure how to answer this.

David felt very hopeful as well but during his period of drug abuse all hope vanished for him. Sharing his life with others gives him hope by allowing him to understand that others struggle as he does. The synagogue has become a real emotional anchor for him.

Of all of congregants who came for a spiritual checkup, Terry was one of the congregants whose life was in the most turmoil. Confronting the losses that she had endured, she stated, "I have had to be hopeful. I always think that things will improve. But, I am going through a difficult time and my sense of hope is being tested.

However, she described a series of experiences while sitting in synagogue on the second day of Rosh Hashanah when the power of being in synagogue on that holy day gave her hope. The first experience was immediately after her first marriage fell apart. Sitting in synagogue and looking up at the stained glass windows gave her strength. Several years later, after her first husband had returned, she was sitting in synagogue pregnant with her first child and she went into labor. These series of events gave her reason to be hopeful because she felt the compassion of God caring for her. She stated explicitly "she believes that God loves her." Being in synagogue was important to her but, to a certain extent, at this very moment of deep loss and despair she felt that God had forsaken her.

f. Who or what is your source of spiritual strength?

How do you describe God? What is God to you?

The spiritual checkup is structured in a very intentional way. Initially it focuses on relationships, feelings, and emotions. Only towards the end of the spiritual checkup does the protocol explicitly focus on actual spiritual questions relating to God. What was striking to me

was how difficult it was for the majority of Jews to speak about their relationship with God. For them, their religion was found through community and not through relationship with God.

As we recalled from above, when it came to his spiritual life, Graham stated that ideas about God interested him intellectually, but did not resonate with him personally. His Judaism was involvement in community. He has a strong sense of Jewish peoplehood and received his sense of spirituality through his love of Judaism.

Victoria found the subject of God to be very unnerving. “Spirituality is a hard idea. I am very scientifically oriented. I don’t have a God vocabulary. Judaism for me is participation.” She was unable to describe her understanding of what God meant to her. She said that until this moment she had not spent a lot of time thinking about it. Her relationship with God had changed because of greater synagogue involvement than she had experienced growing up. “But I don’t have a clear God idea.” Her father approached religion in a rote way. Asking her as part of the protocol: Have there been moments when you have felt a special connection with God? She said “*this spiritual checkup was one of those moments*. But it was hard to put it into words.” I was flattered but cautious because of my psychodynamic training. I was not certain how to interpret her statement. Was there some kind of transference taking place through this answer, or was this truly an eye opening experience? Or in the end, did it really matter?

I suggested to Victoria that she might be able to be open to the spiritual way of looking at life even if she was a scientifically oriented person. I spoke of Einstein’s sense of wonder. He was not formally religious but a deeply spiritual man because he saw in the universe a sense of wonder. I quoted the written statement of Einstein from 1955 in which he wrote: “What I see in Nature is a magnificent structure that we can comprehend only very

imperfectly, and that must fill a thinking person with a feeling of ‘humility.’ This is a genuinely religious feeling that has nothing to do with mysticism.” Furthermore, I went I suggested that when she “thanks God for her children” (an expression that she had used during our spiritual checkup) is that really an expression of gratitude, perhaps a prayer. Perhaps she needed to re-form what God actual means to her. “You might need to explore a different way of looking at God.”

For Laura, issues of spiritual strength were difficult to understand. She could not define God, but saw religion as belonging. However, I suggest that perhaps that God was the power that enables her to make all the new positive steps that she was trying to take in her life possible. This alternate understanding of how God works in the world intrigued her. Her relationship with her family directly impacts her relationship with God. “When I feel that I am all alone, I feel alienated from God.” She also felt alienated from God when she felt stuck in her life and was not taking the initiatives to move forward.” She spoke with a sense of envy about two of her non-Jewish friends that had suggested that she pray and she did not know what they meant. As I have stated above, I experienced this woman as a lost soul and I encouraged her by saying that she needed not only to look at where she felt stuck in her life, but also to affirm with gratitude and hope all that she was doing to improve her life.

Candidly, I felt a great sense of sadness when Yvonne, the female cantor, who could not define in any way what God meant to her. Since she had a philosophical background, she always saw her philosophical life and her cantorial profession separately. She felt a special connection to God in leading worship. However, she longed for a better relationship with God.

Evelyn resisted the question of what is the source of her spiritual strength. For Evelyn this was difficult. She felt like an independent person who draws on her own strength. She admitted that her ideas of God were formed in her youth and the act of prayer for her was very challenging. Her theology was inconsistent. During the High Holidays, she accepts at that moment God who makes judgments. But really doesn't. She also did not understand why God needed so much praise. I said to her that doubt was a very Jewish approach and perhaps there were other ways for her to look at God. I shared with her that I did not see God in anthropomorphic way but as a potential that exists in the universe. And prayer for me was a way to reflect upon myself. How did I measure up? She was intrigued by this alternative.

Gina expressed views similar to Evelyn. She never viewed God as having a relationship with her. "When bad things happened, I never blamed them on God." She wanted very much to become a bat mitzvah and to be more involved in the synagogue. These were the ways that she engaged these issues. I told her that she was a seeker. She was filled with religious questions and this was honest and proper. She needed to find her own path to the spiritual. In my view, she was a work in progress. "Perhaps, in the future you can find language that will help you to connect with God. Your spiritual life is still unfolding and the questioning was holy and good." I emphasized to her that "I was not here to convince her one way or another, but just to help her clarify where she was at this very moment of her journey. Everyone has his or her own path. She should recognize that even when she knows the prayers, this would not necessarily make the prayers meaningful. The God question will remain."

Joan stated that the word spiritual made her uncomfortable. She did not see her strength and hope as rooted in God. She was not sure about what spiritual really referred to.

(I reiterated it is a deep relationship with self, others, the world, and God.) She stated what others had stated: Community is where she experiences God. But when asked when she felt a special connection with God, she spoke of the death of her mother. She began to wonder: is there something else. A sense of tradition and not a relationship with God was the foundation of her spiritual life.

I spoke about the fact that I experienced her as a faithful person. Initially she reacted to this suggestion as a Christian ideal. I said, “You live with integrity, have a sense of hope, express gratefulness, and feel blessed with life. You live with a general sense of confidence. We experience God in our lives not necessarily directly but through its impact.” She ended up liking this faithfulness label. She was going to take it with her because it was a new way of looking at herself within a spiritual context. When I asked her what she had gotten out of this experience, she stated: “I am a person of faithfulness. I like that idea. It is not how I have seen myself before.”

In the aftermath of our meeting, Joan sent me an email: *“And thank you, Rabbi Londy, for introducing me to a self that I never realized was especially spiritual. I might be a little semantically challenged. But I did look up the dictionary* definition of spiritual and picked out one, to wit: Of or pertaining to the spirit as the seat of the moral or religious nature. Adding “moral” to the definition makes it easier to classify myself as spiritual. Another word that came up after I left is “continuity”. It enhances the comfort I feel within the community. I could foresee a “spiritual wellness” retreat or weekend, maybe even an annual event, where people are free to check in with different clergy. Sort of a clinic or therapy minus the stigma.”*

David spoke of a spiritual experience that changed him. When he was in a twelve-step program, he never engaged the idea of a higher power. He stated that he got a lot out of tradition, but if God means anything to him it is about gratitude. As he has matured and gone through life experiences, he is more open to spirituality. But there was a moment that convinced him that there was a God. His college-aged daughter had fainted. Doctors could find nothing wrong. He was visiting her at college and he witnessed walking right behind her having an epileptic episode. For him, it was a miracle that he was there. He saw that as an indication of a benevolent God. His spiritual response now is a sense of gratitude. For some reason, he was there to witness her episode. He saw the hand of God in this moment.

Only two of the candidates for a spiritual check up expressed a deep on going relationship. Terry stated with great certainty that she believed that God loved her. To her, “God is a pebble in me. A source of tenacity, hope and the ability to deal with difficult times.” However, at other times she had been more hopeful. She felt now overwhelmed. At times she feels alienated from God. She knows that she has been blessed, but sometimes she thinks that God’s benevolence was hiding.

At this moment, I did something that I had not done with any other congregant. I prayed with her trying to summarize the positive values she was expressing and seeking. I spoke of the fact that she is full of *hesed*—loving-kindness. I prayed that we hoped that the direction of her life would turn around and good things would happen. I prayed that her feelings of loss and sadness, although great at this moment, could be transformed into something positive. Why did I pray at that moment? It just felt necessary and right.

Christina, the non-Jewish teacher, provided the most vivid sense of what it means to have a spiritual relationship with God. Of all of the people that I met with, she had the clearest

spiritual and prayer life. She found great satisfaction with her child and grandchild; her job teaching very young children; and the power of nature to show God's glory. "I walked near the park today and heard the birds and it felt to me to be miraculous."

Her childhood had been less than ideal. She was the middle child. "I felt that I was always between my younger sister and my older sister." My mother would say: I was the pretty one and my sister was the smart one. I grew up feeling unloved by my mother. My father died when I was very young and this hurt deeply because I had a special relationship with him. She felt very comfortable with the idea of her life having a special purpose. She found deep satisfaction through teaching. When I inquired: were there things that were left unfinished, she offered a moving response: "I want to make sure that I live long enough so that my granddaughter will remember me and know me after I die. She had not given up on the possibility of finding a male companion."

Then, she became tearful and said that she was going to share with me something that no one else in the synagogue knew about. She told me that she was still married. Over thirty years ago, she was married happily to a brilliant man. "We had such a wonderful relationship." He had a cerebral hemorrhage. He survived but was never the same. He went to rehabilitation but never regained his short-term memory and became very belligerent to her when he came home. They stayed together for 11 years but finally they had to separate. He lives in New Jersey, and lives on his own. She had to get him out of the house. It was no longer safe to live with him. Why did she not divorce him? For almost 7 years they had such an ideal marriage. Out of respect for that, I would have felt guilty about abandoning him. She is a woman of great faith, but she was conflicted by many forms of guilt: Guilt about separating from him even though he was abusive; guilt that he remained so long in their home

and his presence potentially affected their child ,and guilt about not looking out for herself. She would have like to have remarried. Her guilt and sense of obligation had paralyzed her. I felt such a sense of honor and gratitude that she was willing to bear this to me.

Nevertheless, she was deeply hopeful. What resources do you use to obtain (maintain) a sense of hope? She did not hesitate: “my faith, my relationship with God. I grew up in the church.” Who or what is your source of spiritual strength? “God” “Do you pray?” “Yes”

She went on to describe how she has gone into the synagogue sanctuary, which she feels is a house of God and has prayed and reflected. “God is the constant foundation of what I can always depend on.”

Were there moments when she felt especially close to God? “I feel it all the time.” However, during difficult days with her husband, at times, she felt alienated from God. Does your relationship with God have any effect on the quality of your life? “It has given me hope.” I had found a person of deep faith in my congregation but she was not a member and not a Jew.

B. Developments Not Anticipated in My Original Proposal that Impacted Execution and Final Outcomes of the Project

I have been thinking about this project for over five years. I believe that it was well thought through and I feel very comfortable with the protocol that I utilized to conduct the spiritual checkups. But technical and pastoral alternations were necessary and did affect the final outcome.

First, after the first two checkups, I did not give the congregants the questions in advance. At first, I thought that it would relieve stress. However, in retrospect, it caused anxiety and inhibited a level of spontaneity. In addition, by not giving them the questions in

advance, it helped to make it more of a conversation rather than a survey, an interview or even a test.

Second, they did not have the questions before them during the interview. I asked the questions. They answered them honestly. Again, this allowed for a more freewheeling conversation where the congregant could just talk.

Third, I utilized the protocol with great care. However, as time went on, I found several adjustments were necessary. I would alter the phrasing of the question if it seemed appropriate. If something had already been discussed, I would skip a question that dealt with the same issue. The protocol was an important road map but it was not so sacred that I was not willing to deviate from it.

Fourth, as time went on, I asked more clarifying questions to the answers being given. I tried to keep them to a minimal. For example, when Terry was speaking about her trouble with her daughter in law, I needed to probe a little to get the full story. Joan works with her sister in business but she was initially not absolutely clear in her checkup about the nature of their relationship in business. I needed to inquire more deeply.

Fifth, and most importantly, my understanding of the enterprise evolved. Clearly it was a spiritual checkup. I was very cautious not to impose my agenda upon the congregants but to lead them. As I did more sessions, I felt an additional responsibility. The candor of the people was extraordinary. My presence in the checkup changed because I ended up much more active than I had originally thought I would be. I found myself trying to help them reframe certain aspects of their story so they saw it in more spiritual terms. As I listened to them-their struggles, triumphs, commitments and accomplishments- so much of it seemed to reflect an unrecognized spiritual strength. They were on a spiritual journey that they were not

all together certain that they were on. I discovered that I needed to be more active than I originally thought in helping them reframe an answer, or proposing another way of looking at an answer or situation that could be viewed in their lives as a deeply spiritual issue. I ultimately determined that besides being an attentive listener (not getting in the way of their story), I needed to help them re-examine their individual narratives in order for them to feel more spiritual. I made comments to them like the following phrases. “You are clearly on a spiritual journey.” “Your life shows that you are a seeker.” “Perhaps, the capacity and resilience that you have shown is God is working in your life.” I never imposed these views but I did suggest or “floated” them. I wanted them to end the session affirmed as spiritual beings and validated for all that had shared with me. And in one situation, I prayed with a congregant. It felt right and needed but it was not something I perceived that I would have done when I first conceived the project.

Sixth, I gave up the thought that there was going to be another session. It seemed clear that this was going to be done in one sitting. Thank goodness I scheduled myself with some flexibility. The shortest sessions lasted an hour and the longest lasted two hours. But the time flew by. We ended when we had completed our conversation.

Seventh, even though I spoke so clearly about confidentiality, I was amazed how open people were to sharing the fact that they had had a spiritual checkup with me.

Eighth, I never anticipated that women would be the primary candidates for spiritual checkups. I thought that the genders of the congregants would be more evenly divided. For some unexplained reason, my female congregants were more open to this kind of encounter. Also, in my limited sampling, the spiritual checkups with a woman had a different quality than with a man. Women seemed more open with their feelings and less guarded than men.

were. It appeared that they had greater access to their emotions than men. Obviously, I must be careful of making overgeneralizations from my limited number of spiritual checkups conducted.

Ninth, I originally anticipated doing five of the check ups. The fact that I did eleven with others interested was very helpful. The more that I did them; the more comfortable I felt. In retrospect, a sampling of five would not have been enough.

Tenth, the sheer intensity of the spiritual checkups was amazing. Both the congregants and I were drained after it. Once, I did three in one day and it was just too much. However, the level of intensity obviously showed that something sacred, real, and important was transpiring between the congregant and me.

Chapter V: Discussion:

A. The implications of results, both anticipated and not anticipated

I am gratified by the success of this pilot project. I want to expand it and make it a regular part of my work. People need opportunities to speak about their spiritual journeys and the state of their spirituality. I believe that this project was effective because I was able to do what I had set out to do: to create a new protocol for doing pastoral counseling that was non-threatening and revealing at the same time. It clearly fits the tenor of our age where people like to talk about spirituality more than religion. So many of my congregants, who are liberal Jews, affirm to me, again and again, that they are spiritual and not religious. I am not always completely certain exactly what they mean by this, but these spiritual checkups fit into their way of thinking. It engaged them rather than turned them off.

For many congregants, they lack a spiritual vocabulary and they have not developed a lens to see their lives in spiritual terms. The spiritual checkup was a beginning. Every session was intense and informative in terms of the material but the feeling was very safe and low key. I did everything in my power just to make it a conversation between the congregant and me. No one decided to skip a question and people were willing to share with me things that I did not anticipate. It is amazing how the normal ego defenses were not in high gear. I will speculate about the reason for this in my discussion of clinical principals

This project struck a deep cord and an important need in the congregation. It seems that I was correct that people wanted an opportunity to speak about their spiritual lives. No other venue in our synagogue existed for these kind of intimate spiritual discussions. The fact that I framed it in a positive manner, and took away the stigma of signing up for it by calling it a spiritual checkup, was very helpful.

It is impossible to generalize about these spiritual checkups. Each one was sacred and each one felt different. However, it was interesting to notice certain recurring themes.

- For those who were married, connection to spouse and children was central. However, so many of congregants described troubling and unresolved issues with siblings, parents, and ex-spouses
- Money and economic security were serious concerns. People had lost money. It effected that sense of security and potentiality the vary quality of their lives.
- Determining a special purpose for person turned out to be difficult question. However, for some, it led to some interesting self reflections.
- As described to me, people realized that they had many acquaintances but not many really close friends with whom they could count on.
- All the congregants had experienced moments of guilt, anger, resentment, and bitterness.
- When it came to being able to forgive, there was no consistent response. People really struggled differently with this question.
- People were generally hopeful but they were also able to identify moments of hopelessness and despair. For the most part, they were able to overcome them.
- Many could identify places where they were stuck in their life. Some had planned to move forward. Others were less confident and unsure of how they could achieve this moving forward.
- Discussions of God's role in their lives spirituality were the most difficult. With only a few exceptions, the idea of having a relationship with God was foreign and uncomfortable. This seemed to be new language to them. One of my goals emerged

as an interpreter, trying to reframe their life's journey in spiritual terms. so they could discover that indeed their lives had elements of spiritual strength and faithfulness.

- For the overwhelming majority of them, their religion and faith came through belonging to the community and not believing in a higher power. Belonging over believing was the essential spiritual theme that I confronted again and again.
- Even those people who were spiritually skeptical, some were able to share moments that for them had real personal and spiritual significance, and which ultimately changed how they viewed life.
- Worship and prayer were not areas of great comfort. Many questioned the meaning and relevance of prayer
- Time after time, when asked about what they were going to take away from this encounter, they said: new questions to struggle with, and perhaps new ways to see what to them once appeared to be mundane. New perspective had challenged them to view their lives in new spiritual terms.
- Consistently, everyone left happy that they had participated in the project and some desire to try to find a way to continue this process.

Obviously the pool of people that I was drawing upon was very limited and thus it is not so surprising that certain theme did arise.

It is important to try to evaluate why these spiritual checkups worked in my specific setting. I believe that the protocol was well constructed. It slowly evolved from personal issues to spiritual issues. It was not forced. But when it was all completed, it revealed how various parts of our congregants' lives, beliefs, questions, relationships and struggles could be viewed as parts to a greater spiritual story that each of us needs to try to construct and tell.

When people heard spiritual checkup, I think that they thought that it would be very focused on specific religious issues. Ultimately, the protocol gets to the specific spiritual issues concerning God but the majority of the time is spent with the person examining their current lives in very tangible ways. In other words, it is very user-friendly in how it unfolds.

My unique professional situation raised critical issues in the area of rabbinic ethics which I did not original recognize when I conceived the project but became relevant as I thought through the implementation of the project in my setting. I am not only bound by professional boundaries of appropriate pastoral counseling. On account of the fact that I am not the senior rabbi and that I work as part of a rabbinic team, respecting the *Code of Ethics for Rabbis* of the Central Conference of American Rabbis was also essential. The Code of Ethics for Rabbis articulated by the C.C.A.R. states explicitly: **Within the exercise of pastoral care the rabbi shall maintain a relationship of trust and confidentiality holding sacred all information revealed within the provision of pastoral care.** (Code, 1991) The only exception to this is when some sort of abuse might be revealed to the rabbi. When I began to conceive of this project, I was serving as the solo rabbi of a congregation of 450 families. When I finally executed this project, I was no longer in this position but was part of a multi-clergy staff. This made my execution of this process more complex and raised rabbinical ethical issues.

As I described in my explanation of how I executed this process, I felt an absolute need to inform the senior rabbi and assistant rabbi of what I was doing. I engaged them in helping me to recruit people for this project. I did not inform them which congregants in the end underwent the spiritual checkup. In a congregation such as ours, a rabbi/educator or

assistant rabbi should not undertake such a project without the full knowledge and endorsement of the senior rabbi.

In my opinion this spiritual checkup protocol can be conducted either in a solo pulpit or in synagogue with multi-clergy. I do not believe that the place of the rabbi in the hierarchical structure of synagogue clergy makes any difference as long as there is transparency about what is being undertaken. If the senior clergy staff is aware of what is happening, and is comfortable with it, any rabbi with the proper training could do this. (I will discuss issue in another part of Chapter V.)

Also stated in the *Code of Ethics for Rabbis* is the following statement: **“Rabbis in the same congregation should keep each other informed of rabbinic services to members and nonmembers. Within the bounds of confidentiality, assistants/associates should keep the senior rabbi informed of all members who enter a counseling relationship with them.”** (Code, 1991)

I believe that a rabbi, other than the senior rabbi, needs to clarify the boundary and confidentiality issues carefully before undertaking this kind of pastoral counseling in the congregation where they serve. In my case, the senior rabbi was informed that these spiritual checkups were to be confidential and requested no further information from me. I promised the congregants that nothing would be revealed about this spiritual checkup to anyone: no one would know that it had occurred; and no one would know the content of this checkup.

If the senior rabbi had objected to this absolute confidentiality because it might undermine his/he role as the senior pastoral counselor (not an unreasonable concern), some negotiation would have had to take place. Several approaches could have be taken: a) I could have chosen not to carry out the spiritual checkup among the congregants of the synagogue

and to seek another way of finding candidates for the spiritual checkup; b) if the senior rabbi wanted me to share with him who had chosen to undergo this spiritual checkup but understood the content was confidential, this could be discussed with the congregants coming for the spiritual checkup. The congregant could determine if they felt comfortable with the requirement of informing the senior rabbi of who was undertaking these spiritual checkups. The congregant could accept this requirement and undergo the spiritual checkup. They could also reject this requirement as a violation of confidentiality. In that case, the spiritual checkup would not be conducted; c) if the Senior Rabbi requested not only information about who had taken the spiritual checkup but a brief summary of issues that were revealed, I would not undertake this project in the synagogue. This requirement would have subverted one of the fundamental requirements of the spiritual checkup.

Personally, I believe that one of the key factors in establishing the right setting for the spiritual checkup and what made it work in the end was the absolute confidentiality of the encounter. If I did not get that latitude, the process would not have been feasible. However, if an issue arose in my session, that I believed the senior rabbi should know about, for example, an issue of abuse, I would have sought the permission of the congregant to share this information. I would have emphasized how important it is for the senior rabbi to know of this situation because of his/her concern and capacity to be supportive.

These spiritual checkups showed me that so often we really do not know what is happening in the lives of our congregants. Some people who came to me were complete strangers but others I knew at least superficially well. But, no matter, the information that was shared about their families, their struggles, their hopes, and their spiritual longings were moving and surprising. I came away recognizing that my congregants are much more

complex than I realize. I have a lot to learn from them in how they have confronted life with dignity and strength. Witnessing these spiritual checkups and seeing the struggles within the lives of these congregants gave me a much a greater sense of empathy than I had previously felt for the challenges that they face and for their serious desire to find meaning in their lives.

The implication for my rabbinic life is profound. I have always conducted my pastoral counseling guided by strict boundaries ingrained in me from my experience with psychoanalysis. The psychoanalytic posture is remote. The spiritual checkup revealed a different side of me to my congregants and to me. Maintaining boundaries were of course essential and will always be so. This experience, more than anything before, showed me that I can not forget the symbolic power of the rabbi to guide, to encourage, to teach, to listen and to comfort. During these spiritual checkups I was doing pastoral counseling in a way that showed me to be much more available and present than I had ever revealed in other counseling situations. This altered posture felt right. I believe that this was good for me and for my congregants.

Was it always possible to arrive at some kind of mutual reading of the person's spiritual life that seemed enlightening and helpful to them? This would be an overstatement. One encounter is not sufficient to create a coherent road map of a person's life. Not all issues could be explored fully. It was in reality more suggestive than definitive. Obviously, not all topics were covered and clearly, natural ego defenses prevented some things from being revealed. However, it was a sacred moment of intensity and a serious inward searching for these congregants.

I am especially delighted that the spiritual checkup affirmed a new congregant/rabbinic alliance to find meaning in a person's life. But, the power of the

encounter was that it allowed people to speak about that which was often not spoken about in their lives because they had not found a safe place in which to do it. People left energized more than with clarity. I believe that the spiritual checkup was a success when people left with new questions that could be struggled with on their own or with me in the future. Did my encounter open the door for someone to speak to me about a personal problem that they would not have done without this special opening? It certainly did in many cases. People are struggling with all kinds of challenges in this uncertain time. People have so many unresolved family issues. My job was not to solve them but to listen to them and to help the congregant understand their significance in their daily lives and in their spiritual journey. However, this spiritual checkup protocol is not a substitute for more on going pastoral counseling or spiritually oriented psychotherapy. A life cannot be summarized in one session. But, asking the right questions in the right setting can open doors from which much could emerge.

B. The contributions of your project to clarifying and expanding

1. The religious principles discussed in Chapter 2

The spiritual checkups were cathartic in the way that I believe the *Cheshbon Haneefesh* procedure should be. (Various forms of catharsis are implicit in the religious language and mythology of the Day of the Atonement.) Through the protocol, we were able to cover the major life issues that the congregant confronted. We examined current family relationships, problematic areas in various parts of their lives. The protocol challenged them to think of their lives as having a special purpose (either self defined or given to them by God). This was a challenging question but I believe that it is essential to a serious spiritual accounting.

I believe on the High Holidays we are challenged to reflect seriously on exactly why we are here? What does God really want of us? The questions of what remained unfinished in the person's life pointed them forward as the entire process of *Teshuvah* is intended to do. *Teshuvah* in Jewish tradition is not just identification of wrongs, regret, and remorse, but a positive vision of what the future can bring for a person. That was the tone of the spiritual checkups. People did not leave depleted but hopeful even when they had identified work that still needed to be done in their lives.

Delving into which relationship were most difficult for them was cathartic for the congregants. It also raised issues for them of what possibly they could do to repair the breaches in their lives with friends and family that they cared about ,or how they could find a way to let go of guilt that had arisen from soured relationships that they felt could not be repaired?

The discussions of feelings of guilt, anger, resentment and bitterness all helped to move the congregant forward in their spiritual reflection about the issue of forgiveness. Giving people a chance just to be honest about their lives in a context where they will not be judged has great reparative power. The difficult struggles, that we all have letting go of personal hurts and slights, or dealing with people who are not remorseful for what they have done to us, are central themes in *cheshbon hanefesh* and *teshuvah*. I believe that this spiritual checkup protocol religiously and emotionally often connected congregants in new yet authentic ways to the essential goals of *cheshbon hanefesh* and the act of *teshuvah*. Yet, only a few people directly referenced the High Holiday period at all.

Moreover, the protocol allowed me to go into areas that go beyond the normal *cheshbon hanefesh*. *Psalm 71:5 teaches: For you have been my hope, O Sovereign LORD, my*

confidence since my youth. How does a person maintain a sense of hope especially when confronted with difficult challenges, disappointments and loss? What I found was not only did some people have their own internal sources of hope which we were able to identify; I believe the spiritual checkup itself generated a sense of hope. Clinebell suggests that:

Supportive growth counseling is a valuable approaching pastoral work, Many people can utilize a supportive counseling relationship, not merely to continue functioning but as the psychological environment in which gradual personal growth occurs....The growth takes place in person's ability to handle life situations constructively by making better use of their personality resources and relationships, rather than in a fundamental reorientation of their personalities. Supportive growth counseling shows that person' coping abilities gain strength as they are used. Short-term supportive relationships enable some people to use their own strength much more effectively. (Clinebell, p. 178).

In a very real sense, Clinebell's description paralleled my experience. One great hope from the spiritual checkup was my desires to help people identify the strength that they already possessed but often minimize or dismiss. In that sense, I believe, that from this pastoral counseling perspective, I was successful. As I have stated above, my approach to Pastoral Counseling has been influenced by my own personal experience and appreciation of psychoanalysis and psychoanalytic psychotherapy. In that setting, care must be shown to be neutral and not to not impose meaning and values. In my training and supervision, this sense of caution has guided me and candidly inhibited me.

However, Rabbi Jack Bloom's discussion of the Rabbi as Symbolic Exemplar supported me in the evolution of my own counseling posture. Even though I was intensely present, I was careful not to get in the way of the story. The spiritual checkup was clearly a sacred relationship where my congregant and I shared, responded to each other, and felt

supported by each other. Most importantly, I felt a need to help the congregant to see new possibilities and to understand their lives in a more spiritual and hopeful way. I believe that this was behind their desire to share their stories so openly even when they were painful. They wanted someone to listen and hoped that they could be provided with a new perspective. “The counselor is content to be a witness and not a player.” (Dittes, p. 61)

At times I have confused psychotherapy and pastoral counseling. These spiritual checkup sessions helped to show me that I as a rabbi in appropriate places am needed to provide hope and healing. As people were telling me their story, the view of the Rabbi in Jewish life as defined by Jack Bloom became extremely helpful to me:

Rabbis, as Symbolic Exemplars, have great power to label, to characterize, and in a word to name. “You are a loving man.” “I sense the presence of a courageous woman.” Your sacrifice demonstrates what a proud Jew you are” You truly are a bighearted person,” etc. If the naming is successful and becomes part of the person’s self identity, something truly important has been brought to be. (Bloom, p 205)

Bloom’s point is so powerful. We should not diminish the significance and power of our symbolic power. Obviously, we should use it judiciously and carefully. But, as someone who has often felt uncomfortable with this symbolic rabbinic power, the role as rabbi doing a spiritual checkup has empowered me in ways that I have never experienced before. In the right settings, rabbis can have tremendous power. To provide hope to a person strongly to understand their spiritual journey is not to be minimized.

The possibilities of utilizing Jewish sources in my spiritual checkups were limited yet significant. Time was short and I did not want to stop the flow of the story that was being given birth to in front of my eyes. However, there were moments when references to Jewish values, stories and experiences were relevant and very powerful.

I was struck by how difficult it was for all of Jewish congregants to speak about their relationship with God. Every time I entered this part of the spiritual checkup people were perplexed. Speaking about having a relationship with God or asking them what God meant to them was extremely difficult.

I would encourage the congregants by suggesting that Jews have always struggled with the idea of God. Moses sought clarity and did not find it. I also would try to encourage them to begin to think about these issues by relating it to the story of Jacob in the Torah. Jacob is far from a perfect man. But God chooses Jacob in spite of his flaws just as God chooses us with our imperfections. Jacob's name is changed to Israel after his night of struggle. God wants a wrestling partner, someone who will struggle and grow, who will seek out the spiritual, never resting, always journeying. To live the life seeking spiritual meaning means we will not have peace and quiet, easy answer, or a life of ease. Some people falsely believe that to be spiritual means to be flawless, serene, demure, always feeling whole and just being nice person.

The choice of Jacob/Israel teaches us that this not the case. We must struggle especially with our understanding of God. I also utilized an effective quote from Einstein dealing with finding God presence in the glory of the universe: as I have referenced above.

2. The clinical principles I discussed in Chapter 2.

The participants in the spiritual checkups were for the most part, with one possible exception, highly functioning people who contained ego strength and resilience. In Freud's psychoanalytic theory of personality, ego strength is the ability of the ego to effectively deal with the demands of the id, the superego, and reality. Those with little ego strength may feel

torn between these competing demands, while those with too much ego strength can become too unyielding and rigid. Ego strength helps us maintain emotional stability and cope with internal and external stress. These people were certainly emotionally healthy to the degree that they had responsibly strong ego function.

What clinical factors contributed to the success of these spiritual check ups. As I stated in chapter two, Gary Ahlskog teaches and writes about the fundamental pastoral counseling stance. “The fundamental counseling stance consists of undivided attention to the client’s concerns within an atmosphere of benign benevolence.” (Ahlskog and Sands, 2000, p.13) We are there to help and to listen. We have no agenda. Another part of these clinical issues in retrospect that seem important is being a non-anxious presence. Dittes states it another way:

The pastoral counselor responds to the counselee’s words, deeds and moods with an evenly hovering attention, indiscriminate, unperturbed, nonchalant, and even bland. The counselor does not favor some part of the counselee’s account more than others, does not evaluate, does not prefer that the counselee be different in attitude or behaviour, does not measure the counsel against standards of psychological health, social responsibility, theological orthodoxy or ethic probity. The counselor does not read into the counselee’s account things that are not said, does not interpret or translate the counselee’s story into a psychological or theological language known to the counselor but not to the counselee “(Dittes, p. 83)

Dittes position is perhaps utopian and to the extreme for my spiritual checkup protocol where there must be dialogue between the rabbi and congregant. But, his emphasis on calm, on being a non-anxious presence is essential. I stated to all the congregants: This is your time. You answer the questions the way you understand them. I am here primarily to listen.

But there is a psycho-dynamic reality to the spiritual checkups which can be overlooked. Much of the formal assessment aspect of pastoral counseling that we have learned in our training is not present in these brief encounters. I did not have a lot of time to develop a rapport and to gather personal information. We went into it very quickly after reciting the prayer and explaining the general rules. How was I able to get their trust so quickly and to go deep so quickly?

Obviously, a lot had to do with transference towards the rabbi. In this situation, I was encountered not only as benevolent rabbi but as the parent/confessor. It is not without meaning that references to being in synagogue on the High Holidays were mentioned a few times. On the High Holidays, our confessions are to God. Clearly, in our context, the rabbi plays a role in the drama as a kind of symbol of God's benevolence, love, help and ability to forgive. I think some of this transference enables us to get started quickly and established immediate trust.

However, there is another dynamic principle that helps me to understand how I was able to create a safe environment to make the work possible. We see this in Winnicott's concept of creating a safe space. Marilyn Charles in her work Learning From Experience: A Guide book for Clinicians summarizes this issue concisely.

As we consider the issue of containment and how we might make the therapeutic space sufficiently safe for ourselves and our patients, some very useful notions to have in mind are Winnicott's (1965) conceptions of the "good enough" mother who provides for the child a "holding" or "facilitating" environment within which to grow. These ideas came from his observations of mothers and young children. Winnicott, a pediatrician as well as a psychoanalyst, was an astute observer of his tiny patients and their relationships with their parents. He had notice that if the mother was good

enough, the child was able to develop his or her own resources, using the mother as a safety net.

Winnicott applies these ideas directly to the therapeutic environment. In his own work, he explicitly attempted to provide a safe place within which the patient could develop his or her own resources. An important aspect of this safety is having respect for the process itself. Our fears of not being good enough, of not having enough to offer, can cause us to foreclose on the important containing processes that are developing between the patient and ourselves. Our lack of faith then provides a model of fear-driven foreclosure that further affirms the other's lack of faith in self and world. (Charles, p.204)

One of the keys to my success was rooted in creating an environment of containment that made people feel safe and secure. I believe that there were many factors. I created the security of complete confidentiality. I was a rabbi and I was seeking their assistance in a project. They knew that I had advance training. Moreover, I feel that there is in our synagogue a general trust in my maturity and stability. The protocol created a safe structure where people knew that everyone would endure the same experience. The venue was calm and private. No pressure existed in the room. We sat face to face. I took no notes. I just looked at them and listened. I had no agenda but to listen and at times reframe. This structure of containment was achieved and I think was vital to my success.

Awareness and managing my counter transference was a major part of the experience for me. It helped me to learn and helped the people as well. Difficult issues were raised that elicited strong reactions within me. I have a loving family but my relationship with my mother and brother are far from ideal. I too face the economic challenges that all of these congregants live with. At times, I am resentful of the economic inequalities between me and my congregants. The man who was starting a new business venture challenged my own sense

of confidence to act in a bold way. I have faced the fears of a life work left incomplete and the lack of hope. I am also a person who struggles daily with what God and faith mean to me. Every issue raised elicited a counter-transferential response. I was deeply aware of it but it was also a blessing. My intensity of feeling enabled me to understand deeply what was being presented to me: what was profoundly at stake in these spiritual checkups. It also left me with a great sense of admiration. I experienced tremendous courage and strength in these people. Their strength and courage gave me hope as well. Every spiritual checkup for a congregant was a spiritual checkup for me as well. These sessions were intense and draining because what was being explored mattered so much to them and to me.

C. Contributions of your Project to ministry in a wider context.

The question of what makes this a **Jewish** Spiritual Checkup was raised in earlier part of my paper. However, it is important to reiterate why I think that this was a Jewish Spiritual Checkup because it was project undertaken by me, a rabbi, as part of my rabbinical pastoral duties. I have stated that undoubtedly that I wanted this protocol to be *spiritual* and not *religious* in tone so that I would not impose my own theological language and agenda. I think that the verbatim material that I shared validates my decision and indicates that I did not force a specific theological language upon my congregants. Moreover, the intensity and profoundly person nature of the material that was discussed in these spiritual checkups indicated that I did succeed in creating a positive environment to undertake this protocol.

However, even with my concerns about avoiding religious language that may be intimidating, I want to affirm strongly that my spiritual check was indeed a Jewish spiritual check up. (Obviously my spiritual checkup with the non-Jewish person indicates the potential for this project to go beyond the synagogue world.) First, my congregants were attracted to

this process and were willing to do it because I was their rabbi. People continue to seek appointments. They know that I am someone with a deep Jewish commitment and with significant Jewish learning. They also know that I seek as their rabbi to strengthen their own sense of Jewish commitment and connection by the very nature of who I am. Except for the first spiritual checkup, all of them were conducted in the synagogue. In the future, I would only conduct them in the synagogue. Entering the synagogue, which symbolizes the presence of God, is a key element in making these spiritual checkups work.

Second, these spiritual checkups are uniquely Jewish by the freedom that it gives the people to explore their faith. I believe that our tradition is exceptionally open to spiritual exploration. We have a very broad theological framework in which to struggle and find meaning. Jews instinctively reject dogma. That is why there are no catechisms in Judaism that a Jew is required to recite as an act of fidelity to Judaism. (The closest we come to this in Jewish liturgy is the hymn Yigdal. However, I do not think that our congregants conceive of this hymn as more than a beautiful conclusion to a worship service.) The openness to exploration in a non-judgmental way reflects the Jewish ethos of personal autonomy of the congregants with whom I met. They arrived with questions and doubts but also with an insightful sense of openness and willingness to explore. I got the feeling that for some they were wondering: “why in all these years have I not had this kind of conversation with my rabbi?”

Third, as I have stated above, Rabbi Jack Blooms’ idea of the Rabbi as a Symbolic Exemplar is a significant factor in making this project work. In our roles as rabbis, we are capable of facilitating and framing certain holy events because of what we represent symbolically. A rabbi reflects both the rabbinic tradition and the priestly tradition. People

came to me as a rabbi knowing of my learning, but also feeling that I represented the presence of the living God who would hear their story, who would honor them, and who would understand them. In a real way, the spiritual checkup is partially an affirmation of the priestly dimension of being a rabbi. This factor was not altogether clear to me when I began this project. Obviously, when I attempted to frame or to reframe the spiritual story that they had presented to me, I was clearly reflecting a Jewish theological worldview.

Fourth, the questions raised were all fundamentally Jewish questions that connect with deep issues in our Jewish journeys: what is the meaning of our lives, how do we achieve loving relationships, how do we learn to forgive, how do we do Teshuvah (overcome roadblocks or get back on the path) in our earthly journey, and finally, how do we understand the ideal of having *a relationship with God* in our lives. These same fundamental questions have dominated the inner lives of Jews across the centuries. All the great spiritual giants of our people have confronted them: the patriarchs, Moses, the prophets, the ancient sages, the medieval philosophers, and the creators of modern liberal Judaism. They most certainly reflect the questions that our congregants struggle with even if they have difficulty always articulating them in theological terms.

Fifth, I believe that these spiritual checkups work as a Jewish experience because people are looking for a different relationship with their rabbi than in other generations. I believe that my members are not looking for absolutes but want someone to help them figure out their unique path to God and to Judaism. I, as their rabbi, was the ideal person with whom to undertake this exploration. This spiritual checkup is a way for my congregants “to get through the door of my office.” It enables them to talk about what is deep in their souls. The spiritual checkup is not an end in itself; it is a beginning to a serious dialogue with me.

Perhaps social workers or psychotherapist could do something similar. However, the symbolic meaning that I as a rabbi have to my congregants (our congregant's unique transference towards us) gave me a distinctive opportunity to do this kind of intensive spiritual work.

Sixth, the spiritual checkup specifically with me is a pathway to intimacy with a rabbi and thus affirms by definition its Jewish significance. I am convinced that this spiritual checkup allowed me to have a unique relationship with congregants that probably would not have arisen in other rabbinic settings. Of course, I do not diminish other pastoral roles that I have and their potential for creating special bonds. All pastoral situations are openings. Weddings, funerals, babynamings, bnai mitzvah and similar life-cycle moments create opportunities for connection and relationship with the rabbi. But, they are not structured in a way so that the entire session is focused on the congregant to discuss theological matters. I don't want to fool myself or to be grandiose. Not everyone would be willing to undertake this kind of process. But, I have religious seekers in my congregation who want to find ways to spiritually grow. If their rabbi is not a wonderful resource for this process, who is?

My project began as a limited undertaking. Could I create a new paradigm to do pastoral counseling using a positive model of a spiritual checkup? It worked well. People have responded to it, and I will continue to do them beyond the end of this project. For me it is essential that our synagogue (all synagogues) become a place where spiritual growth, question and explanation are center stage in our religious institutions. Many synagogue are spiritual vapid. They have become too institutional; too committed to preserving empty forms; or failed to see the potential of traditional forms to be used in new ways. My thought that if enough people in the synagogue had spiritual checkups, the level of discourse would change in the synagogue. People might demand different programs, resources, classes, worship, and

involvement. For me, it is all about exploring our relationship with God. This is particularly important considering the fact that liberal Jews have such difficulty speaking about the incomplete parts of their lives, their relationship to God, their prayer life, and so much more. If the synagogue is not open to this kind of discussion and discourse, we will be hollow and eventually crumble.

Will be able to achieve this in my synagogue? I do not know. People are already thinking about follow-up retreats, classes on spirituality and the like. I am thinking about how a second meeting, a follow up to the spiritual checkup, would be constructed. But I am certainly not done with this project.

D. Implications for future ministry.

I was so deeply gratified that a non-Jew took part in my spiritual checkup. I felt just as capable of carrying it out with a non-Jew as I did with Jewish congregants. I believe that this has rich implications for clergy of all faith traditions. I developed this project for a rabbi but certainly with some tweaking it could be used for other faith groups.

My concern is who is qualified to do it. As I stated, 18 years ago, I tried it and it failed. Clearly my post graduate training in pastoral counseling, my supervision, the synthesis seminar at HUC-JIR and my psychotherapy gave me the insights, restraint and understanding to deal with these spiritual checkups with many of them being very intense. Would a non-trained clergyperson be self aware enough to restrain their need to speak or to handle with some insight the transferential and counter transferential issues? I would be fearful of this. My opinion is that this should be a tool taught to people seeking advance training. Sometimes good things in the wrong hands can be catastrophic.

However, I am seeking a paradigm shift in synagogue and the rabbinate. We, rabbis, need to be more than crisis managers. We all in some form have to be spiritual guides and mentors. In an age where people are seekers and even change religions during their lifetime, rabbis need to be able to engage in serious discussions of the soul and the spirit. My project is one step towards this for me. I hope that this spiritual checkup protocol can have an impact on American Judaism. Regardless my training and work on this project has opened my horizons and changed me. For me this is a great blessing.

Appendix A

In various places in this paper, I made references to texts that I used in the actual spiritual checkups when I responded to a specific issue being raised. I wanted to include them so that a reader who is unfamiliar with my reference would have the entire text available to them. Here are some of those references.

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Heschel's statement: A Jew is asked to make a Leap of Action.

(Abraham Joshua Heschel God in Search of Man: A Philosophy of Judaism p.283)

A Jewish is asked to take a leap of action rather than a leap of thought. He is asked to surpass his needs, to do more than he understands in order to understand more than he does. In carrying out the word of the Torah he is ushered into the presence of spiritual meaning. Through the ecstasy of deeds he learns to be certain of the hereness of God. Right living is a way to right thinking.

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Abraham is an example that it is never too late to seek a special and new purpose in our lives.

(Genesis Chapter 12 (JPS translation))

1 The Lord said to Abram, Go forth from your native land and from your father's house to the land that I will show you.

2 I will make of you a great nation,

And I will bless you;

I will make your name great,

And you shall be a blessing.

3 I will bless those who bless you

And curse him that curses you;

And all the families of the earth

Shall bless themselves by you."

4 Abram went forth as the Lord had commanded him, and Lot went with him. Abram was seventy-five years old when he left Haran

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Being satisfied with what we have:

(Pirke Avot 4: 1)

Who is rich? He that rejoices in his portion, as it is written (Psalm 128:2): When you labor with your own hands happy shall you be and it shall be well with you."

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How do respond to the feeling of being stuck in our lives.

(Babylonian Talmud, *Sotah* 36b-37a)

A midrash on the parting of the Sea of Reeds as the Jews fled from Egypt:

R. Judah said to R. Meir. . One tribe said, "I will not be the first to go into the sea"; and another tribe also said, "I will not be the first to go into the sea." While they were standing there deliberating, Nachshon the son of Aminadab sprang forward and was the first to go down into the sea.

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The dysfunctional nature of the patriarchal families of Genesis

(Naomi Rosenblatt, Wrestling with Angels: What the First Family of Genesis Teaches us About Our Spiritual Identity, Sexuality, and Personal Relationships p.IV)

Three millennia before the writings of Tolstoy and Freud, the Book of Genesis chronicled one family's multigenerational struggle to come to terms with the eternal themes of meaning and purpose. By exploring this saga of the first family of the Bible, we can discover how their conflicts and transcendent spiritual vision reflect our own contemporary search for a purposeful life. What makes the first family of Genesis uniquely contemporary and compelling? How do the lives of these people speak to us today? How do their struggles illuminate our personal issues of identity, meaning, and purpose? There are no simple answers, no pat formulas for salvation. But what the Book of Genesis does offer is a comprehensive framework for exploring human nature and for embracing adult life with all its rewards and responsibilities.

Both the human condition and family dynamic have changed remarkably little since ancient times. The men and women of Genesis are very much like you and me—lusting for pleasure and power, dealing with sibling rivalry, and learning, by trial and error, how to be parents. They fail more often than they succeed. But it is through failing that they move forward, however painfully, in solving their problems. To the end, this family prevails by clinging to its faith in its spiritual identity. One generation is linked to the next by a shared commitment to a higher purpose that

transcends the mundane aspects of its members' lives, offering a code of behavior that curbs their worst instincts and gives expression to their highest ideals of compassion, love, and justice.

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(Commentary of Rabbi Cheryl Peretz –Parasha Vayislach – Faith and Doubt December 17, 2005. Email commentary from American Jewish University)

The Torah portion begins with Jacob and Esau still estranged from one another. After a long battle of sibling rivalry and deception, the brothers are ultimately reunited, but not without some reticence and caution from both Jacob and Esau. Prior to their reconciliation, however, the Torah records Jacob's flight when he thought Esau was trying to kill him.

"That same night he arose, took his two wives (Rachel and Leah), his two maidservants and his eleven children (not all his children have been born by this point of the story), he crossed the Jabbok (river)... Jacob was left alone and a man wrestled with him until the break of dawn. When he (the angel) saw that he had not prevailed against him, he wrenched Jacob's hip at its socket, so that the socket of his hip was strained as he wrestled with him. Then he (Jacob) said: "Let me go, for dawn is breaking". But he answered, "I will not let you go unless you bless me." He (angel) said to him, "What is your name?" He replied, "Jacob." He (angel) said, "Your name shall no longer be Jacob, but Israel, for you have wrestled with God and man and have prevailed." Genesis 42:23-29

The word Israel literally means "one who struggles with God". In defining the Jewish people, the Torah names our people after the one who struggles with God. Rabbi Gordis explains that the Torah does not name the people after Abraham, perhaps as a result of his willingness to sacrifice his son, Isaac. Nor does the Torah name the Jewish people after Isaac, the weaker, more accommodating son who was almost sacrificed on the altar and who continues the pattern of submission throughout his life. Rather, he explains, the Torah suggests that the true descendants of Israel are those who follow Jacob - those who struggle while on their own journey.

The essence of being Jewish is not about blind faith in God, nor is it about absolute certainty, but rather it is about struggle – with ourselves and with God. This understanding suggests an ongoing process and dialogue in our relationship with God. Our tradition is meant to engage us in an ongoing debate. When we struggle are we able to question, doubt, think and process. It is through this type of journey that we are ultimately able to have a relationship with God that includes knowing God and encountering God. So, it seems to me that it IS the Jewish way to have moments in which we wonder about or even doubt.

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(An alternate way of looking at God from a Naturalist point of view)

Mordecai Kaplan Questions Jews Ask p. 84

Man normally veers in the direction of that which makes for the fulfillment of his destiny as a human being. That fact indicates the functioning of a cosmic Power, which influences his behavior.

Mordecai Kaplan Questions Jews Ask p. 103

God is the Process by which the universe produces persons and persons are the process by which God manifest in the individual.

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(An example of living a life full of chesed)

Babylonian Talmud Sotah 14 a

How are we to understand biblical verse Deuteronomy 13:5" After the Lord your God you shall walk? Is it possible to walk after the Holy Presence given that God is a devouring fire? It means to walk after His attributes: as He clothes the naked, do thou clothe the naked; as He visits the sick, do thou visit the sick; as He comforts the mourners, do thou also comfort the mourners, as he buries the dead, do thou also bury the dead"

Appendix B

The protocol that I used was intentionally free from religious jargon or teachings. I have already explained in the text above why this approach was taken. However, I wanted to offer some Jewish texts that relate to the vary questions being asked in the spiritual checkup. The questions did have a complex theological language to them but, my thought process behind them reflected important Jewish teachings and issues.

What are the things that you are most happy about in your life?

[Psalm 13:6]

"I trust in Your kindness, my heart will exult in Your deliverance; I will sing to God, for He has rewarded me."

What things bring you the most discomfort or difficulty at this time in your life?

[Psalm 51 12-14]

Fashion a pure heart form, O God;
Create in me a steadfast spirit.
Do not cast me out of the Your presence,
Or take Your holy spirit away from me.
Let me again rejoice in Your help; let a vigorous spirit sustain me.

Do you believe that your life has a special purpose?

[Rabbi Hayyim of Zans Darkhe Noam]

There is a Hasidic story, which tells of a man who went for a walk in the forest and got lost. He wandered around for hours trying to find his way back to town, trying one path after another, but none of them led out. Then abruptly he came across another hiker walking through the forest. He cried out, *Thank God for another human being. Can you show me the way back to town?* The other man replied, *No, I'm lost, too, but we can help each other by telling which paths we've already tried and been disappointed in. That will help us find the one that leads out.* (Agnon, p.22)

[Legend about Hasidic rabbi Zusya of Hanipoli]

Before he died, Rabbi Zusya said:

“In the world to come they will not ask me, ‘Why were you not Moses?’ “They will ask me, Why were you not Zusya?” (Klagsbrun, p.6)

What is (are) your most significant relationship(s)?

[Genesis 18:2]

The Lord God said, "It is not good for man to be alone...

How would you describe these relationships?

[Ethics of the Fathers, chapter 5, paragraph 29]

“If love depends on some selfish end, when the end fails, love fails. But if it does not depend on a selfish end, it will never fail

What prompts you to forgive others?

[Fathers According to Rabbi Natan, Chapter 41]

If you have done your fellow a slight wrong, let it be a serious matter in your eyes; but if you have done your fellow much good, let it be a trifle in your eyes. And if your fellow has done you a slight favor, let it be a great thing in your eyes; if your fellow had done you a great evil, let it be a little thing in your eyes (Klagsbrun, p.84)

Hope

[Psalm 33:20-22]

We set our hope on the Lord,
He is our help and shield;
In Him our hearts rejoice
For in His Holy name we trust
May we enjoy, O lord, your faithful care,
As we have put our hope in you

Have you ever felt hopeless? If so, describe the situation

[Psalm 69:2-5]

Deliver me, O God,
For the waters have reached my neck;
I am sinking into the slimy deep
And find no foothold;
I have come into the watery depths;
the flood sweeps me away.
I am weary with calling;
My throat is dry
My eyes fail
While I wait for God

Life's Journey

[Erich Fromm Psychoanalysis and Religion p.49]

God is the image of man's higher self, a symbol of what man potentially is or ought to become.

Source of Spiritual Strength

[Avraham Isaac HaKohen Kook, Orot Ha-Kodesh P.83-84]

If you want, O creature of flesh and blood, contemplate the light of God's presence throughout all creation. Contemplate the ecstasy of spiritual existence and how it suffuses every dimension of life—spiritual and material. Right there before the vision of your body and the vision of your soul.

Meditate on the wonders of creation and the divine life within them. Not in some diluted form, as a mere performance distant from your vision but instead, know it as the reality within which you live.

Know yourself and know your world. Know the meditations of your own heart and of every sentient being. Locate the Source of Life deep within you, high above you and all around you—the wondrous splendor of life within which you dwell.

Now raise the love you feel within you to the source of her strength and the ecstasy of her glory. Let her blossom within every meditation. For the cascade of the Soul of the Life of the worlds is a splendor only diminished by the vantage point of the one who seeks to understand.

See the lights and see what is within them. Don't let the holy Names and phrases and letters overwhelm your soul for they have been given over into your hand and not you into theirs.

Go all the way up! The strength is yours—wings of spirit like mighty eagles. Don't weaken them, lest they weaken you. But seek them and they will be there for you at once.

So precious and sacred are the manifestations of this reality to us! They are an obligation for us along with all those of more limited spiritual vision. Once we attain a life of awareness, we must not stray from that supernal point. The light always flows from that which cannot be fathomed toward that which can. It emanates from the light of the One without end.

We are each summoned to delight in the ecstasy of heaven, with each individual thought which is all part of the great unity from which all life issues. (Kushner, 2001, pp.15-16)

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