Talking Ourselves Well

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Using Life Review to Increase Spiritual Well Being

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UDedication

To my wife, Betsy, without whose support this project would never have become reality. Your unflagging belief in me, at the times when I was unsure of myself, kept me going. For all the times you pitched in for me, for the fun we deferred and for being so understanding,

To my daughter Adina, whose love helped heal me and understand the true meaning of integrity,

To all my friends and colleagues who have contributed their wisdom and patience in matters intellectual and spiritual, for making me a better me.

To all my teachers, both academic and professional, for instilling in me wisdom, courage, and compassion, preserving your memory, and that of your teachers, enabling me to forge another link on our chain of tradition.

Thank you.

And to my daughter Emma Lee, 1998-2000, whose death sparked a search for meaning that led to this project.

And finally to my mother, who finally gets to look down from the world to come and say My Son, The Doctor.

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Chapter: 1   <u>**INTRODUCTION**</u>

I am currently working as a hospital chaplain. In many ways I think it is the best job in the world. My job is to go have conversations with people I do not know, at least initially. They are away from their families, in a strange place, often with beeps and alarms, and blood pressure cuffs. They usually have difficulty sleeping and when they finally fall asleep, they are awakened so blood could be drawn. Most think the food is disgusting, while the medicine tastes worse. And into this haven of hospitality, in walks a stranger who says he is a chaplain. And I tell them it is my job to listen; that anything they want to talk about is fair game and that everything is confidential; that chaplains "do a lot more than talk about religion."

That is when I hear about the food and the sleep and the smells and the beeps. I listen empathetically, absorbing what they are saying, and then the magic happens. They stop talking about the mundane complaints about being in the hospital and I begin to hear what is really on their mind or should I say their heart.

- maybe they are worried about the new procedure that they do not understand

- maybe they just don't seem to be getting better

- maybe they haven't told anyone yet, but it's cancer.

- what if they don't make it.

Usually, all these concerns are just worries that will pass as they recuperate. They go home and I never see them again.

But every once in a while, it is a more serious case. One in which the patient I am working with knows that most likely and sometimes most assuredly, he or she will not recover, that the end is in sight. Maybe not in days or hours, but within weeks. These are

not easy cases and how the patient handles the situation varies greatly. Sometimes there is bitterness, sometimes there is peace, often there is confusion.

I often hear questions of fairness. Why me? Why now? Questions that have no answers, but need to be spoken. Then come the questions about meaning. Did I make a difference with my life? Why was I put here? Was I good enough? Will I be remembered? Did my life mean something? While I know they are not addressing this question to me, I still tremble on the inside, wishing I could answer. They are questions I ask myself. "Where **does** meaning come from?" How **does** one make one's life "worth it."

These same questions lie at the heart of Erikson's eighth stage of development, "Integrity vs. Despair." Through my clinical education, as part of the degree to which this project is the culmination, I have become familiar with the stage theory of development of Erik Erikson.

As the questions get asked that have no answers, I hold someone's hand, say a prayer for strength, for renewal, and dare I say, healing. Sometimes I feel like I am a medic on Erikson's battlefield, dealing with those who are wounded in the struggle, but yet struggle still. At other times, I feel I am in need of treatment myself. This stage Erikson considered the last stage of life, entered into only after one retires from one's occupation and childrearing. If so, how can I have caught this bug? It can be explained by Erikson himself, "at every successive developmental stage, the individual is also increasingly engaged in the anticipation of [the stages] that have yet become focal"[1]   Furthermore, I am neither a fundamentalist with regard to the altar of religion nor to the altar of psychology. I accept the concept of the stages of

the life cycle with a degree of flexibility.

Theologically, these questions have brought me to Paul Tillich, who says that the answer is to have "The Courage to Be." While I cannot say that I have been able yet to live my life by this courage, I still suffer from the ontological anxiety of non-being, it has made me realize the importance of meaning in one's life, and how the search for meaning is a vital spiritual journey.

There is a Jewish proverb, I will discuss in the body of the text, that says "Repent one day before your death" [*Shabbat* 153a]. I take that to mean use every day to prepare for your last, for when it arrives you will not have time. My tradition is telling me to make sure my bag gets packed before that final journey.

But these are not the words of wisdom I share with someone at the end of his/her life, the bubbas and zeidies of the Temples where I have worked. They kvetch about their kids and kvell about their grandkids, but there is a quiet desperation in what they have to say, if only they could get someone to listen. Most of them claim not to be concerned. They have made their bed and will now lie on it. But on Yom Kippur, they are the ones that really say the prayers. Is it from years of practice, or are they asking for special consideration? Are they staring into the abyss which is coming much too close for comfort, wondering if they are "worthy" and which way the scale would tip if the deeds of their life were measured? In Judaism, we are called on to reflect on our lives annually, to search our souls and ask how we can live the future with integrity. What past actions must we admit were mistakes, hurtful and wrong? How can we repair our relationships with those we have hurt, those who have hurt us and God? We refer to that soul searching by the Hebrew term *cheshbon nefesh*, an accounting of the soul. And part of

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[1]   Erikson, Erikson and Kivnik (1986) p. 40.

that accounting is to decide what is important in our lives, and why the less important stuff keeps getting in the way.

This work is part of my own journey for healing. A journey that started with the death of my daughter, soon followed by the tragedy of Sept 11, 2001. Those two events impelled me to begin the Doctor of Ministry program. I discovered my work in healing others was the best source of healing for myself. This led me to chaplaincy, and now specifically working with elders, to afford them a healing of the spirit, as the mind and body approach the end of life.

To help the elders I work with feel that their lives do have meaning, and help them appreciate the gifts they are, I had initially planned to use writing ethical wills and spiritual autobiographies. Both have long traditions within both Judaism (ethical will) and the Protestant tradition (Spiritual Autobiographies). But as I learned more about the population I would be working with, their needs, abilities and limitations, and given the time available to complete the project, I determined that a program of life review was more appropriate.

In the remainder of this document, I hope to show why life review benefits the seniors I work with, both spiritually and psychologically; how life review fits into psychological tradition, as well as my own Jewish religious tradition; how I performed a life review program with the seniors; and what the results have been.

Chapter: 2   __PSYCHOLOGICAL PERSPECTIVE__

A. Introduction

The goal of my project is to increase the spiritual well-being of a group of seniors,

aged between 75 and 98, living in a nursing home affiliated with the hospital where I

work as a chaplain, and help them do the psycho-spiritual work necessary to be prepared

to die.

My project is based on the use of "Life Review" as a psycho-spiritual

intervention. Life Review is a technique pioneered by Robert Butler, who suggested that

reminiscing is a normal part of aging, which promotes psychic integration. He suggested

that this review of one's life was:

> … a naturally occurring, universal mental process characterized by the progressive return
> to consciousness of past experiences, and particularly, the resurgence of unresolved
> conflicts … these revived experiences can be surveyed and integrated … this process is
> prompted by the realization of approaching dissolution and death and the inability to
> maintain one's sense of invulnerability.[2]

He suggests that as one reviews the past, previous events and meanings are reconsidered,

which may provide a more valid picture resulting in a reorganization of the person's

personality.

Numerous writers have suggested the link to Erikson's eighth stage of the struggle

for integrity over despair. The reorganization of the personality that Butler suggested

would be part of the mechanism whereby individuals, in old age, come to terms with their

life in order to reach integrity.

Erikson's model is called epigenic, meaning we mature and develop through a

series of stages, which occur in a predetermined order and during a specified time frame,

and are determined by our physical and social as well as our psychic development. In

each stage, the developing individual is faced with a developmental challenge that has

two possible outcomes. One is generally more positively valued than the other is,

although some of each outcome becomes part of the individual's nature. Each individual

strikes a unique balance dependent on his/her psyche and his/her reaction to his or her

social situation. Rev. Donald Capp explains:

> [Erikson views] development as a series of eight steps which a person ascends in "chronological" order. Unless there is premature death, we all go through the stages on schedule … Good progress at one stage increases our chances for good progress at the next stage; for positive growth is cumulative. But the reverse is also true: if one stage is poorly negotiated, we are more vulnerable to poor progress in the next stage.[3]

However it is also possible at any time to reprocess work done in previous stages, as

Erikson says:

> At every successive stage, earlier conflicts must be reresolved in relation to the current level of development. …
> An essential aspect of what is involved in integrating the final two opposites [integrity vs. despair] is a renewed and old-age specific willingness to remember and review earlier experiences.[4]

This is exactly what happens in Life Review!

Erikson's stages use the following pairs of opposites.

Stage 8: Old Age -   Integrity vs. Despair
Stage 7: Middle Age -   Generativity vs. Stagnation
Stage 6: Young Adult - Intimacy vs. Isolation
Stage 5: Teens -   Identity vs. Identity Confusion
Stage 4: Adolescent -   Industry vs. Inferiority
Stage 3: School Aged - Initiative vs. Guilt
Stage 2: Toddler -   Autonomy vs. Shame and Doubt
Stage 1: Infant -   Basic Trust vs. Basic Mistrust

This psychological perspective will accomplish the following:

· a review of Erikson's model of development stages 1-7;

· a discussion of development in old age including the theories of Erikson,

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[2] Butler, Rober   t (1963) p. 330
[3] Capps, Donald (2002) p. 19
[4]   Erikson, E. et al page 40

> Peck and Tornstam;

· a more in-depth discussion of the Life Review technique.

B. Erikson's First Seven Stages

The theories of Erik Erikson hold that people's egos and personalities grow and change throughout their lifetimes. Erikson believed that because we are social animals, the society has also evolved certain social orders, roles, and demands that are parallel with physical growth. The interaction between physical, cognitive, and social growth during maturation in each stage of life creates a sequence of developmental crises that become central to the child's growth. "Crisis is used here … to connote not a threat of catastrophe, but a turning point, a crucial period of increased vulnerability and heightened potential." [5] The resolution of this challenge steers the individual toward one of two directions. Although Erikson refers to the poles as positive ("systonic") and negative ("dystonic"), this refers to which pole needs to dominate. This does not mean that we can totally eliminate the negative weakness entirely. What counts is the ratio between the two. Healthy growth requires the positive to predominate, but always with some of the negative in the balance.

If a stage is managed well, we carry away a certain virtue or psychosocial strength which will help us through the rest of the stages of our lives. Alternatively, we may develop "maladaptations" and "malignancies." Malignancy, the worse of the two, involves too little of the positive and too much of the negative aspect of the task, such as a person who cannot trust others. Maladaptation involves too much of the positive and too little of the negative, such as a person who trusts too much.

Emerging from a stage does not cast the balance of systonic and dystonic in stone

forever. People constantly re-evaluate their environment, and adjust the balance to their

given reality. "At each successive stage, earlier conflicts must be resolved in relation to

the current level of development … [and] will also be expected to … take [their] . . .

place in the integration of the whole ensemble." [6]

Stage I - Trust vs. Mistrust - Infancy (up to one year[7])

Erikson's first stage corresponds to the oral (Erikson's adds sensory) stage in

classical Freudian psychoanalytic theory and usually extends through the first year. The

task is to develop trust without completely eliminating the capacity for mistrust. To the

extent the child's needs are addressed, a sense of trust develops. Alternatively, "Basic

mistrust develops when the infant experiences the world, through encounters with its

[parents] as unreliable and unpredictable." [8] The balance of trust and mistrust

> helps create the basis for the most essential overall outlook of life, namely, hope … Hope
> is the enduring belief in the benevolence of fate, in spite of the dark urges and rages that
> also mark the beginning of existence. Hope thus is the ontogenetic basis of faith.[9]

Overly protecting a child can risk the maladaptive tendency call "sensory

maladjustment:" Overly trusting, this person cannot believe anyone would mean them

harm. Worse, is the child whose balance is tipped over to the mistrust side. This risks the

malignant tendency of withdrawal, characterized by depression, paranoia, and possibly

psychosis. With the proper balance, the child develops the virtue "hope," the strong belief

that, even when things are not going well, they will work out well in the end.

The conflict of basic trust-versus-mistrust is not resolved once and for all during

the first year of life; it arises again (as is true for each stage's conflict) at each successive

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[5]   Erikson, et al (1968), p. 96

[6]   Ibid. page 40.

[7]   The ages for each stage are approximate.

[8]   Capps, Donald (2002) p 24

stage of development. There is both opportunity and danger in this. A child, entering

school with a sense of mistrust, may come to trust a teacher who has taken the trouble to

make him/herself trustworthy; with this second chance, the child may overcome its early

mistrust. Alternatively, a child who comes through infancy with a sense of trust, can still

have its sense of mistrust activated at a later stage if, for example, its parents are divorced

under acrimonious circumstances.

Stage II - Autonomy vs. Shame - toddler (18 months-3 years)

The second stage corresponds to Freud's anal-retentive stage (Erikson calls it

anal-muscular). The task is for the toddler to develop a sense of autonomy, while

avoiding an excessive sense of shame and doubt. It extends from about 18 months to

about three years.

> One-to-three-year-olds can express their own will and therefore will do battle for their
> own autonomy. On the one hand they want to "do it myself." On the other hand they
> want others to know that "you can't make me do it. … clinging to possessions at one
> moment and discarding them the next. The child struggles with conflicting passions:
> cooperation and willfulness, docility and assertiveness, submissiveness and obstinacy.[10]

No wonder it's called the "terrible twos."

The child, now a toddler, needs to explore and manipulate his or her

environment, to develop a sense of autonomy or independence. By the parent being firm,

but tolerant, the child develops both self-control and self-esteem. Severely restricting

attempts to explore and be independent may cause the child to assume he/she cannot and

should not act on his/her own. This can lead to shame and doubt of his or her abilities.

Giving unrestricted freedom and no limits, or not letting children do for themselves, can

give the impression that they are not good for much. "Shame is the experience of being

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[9]   pp 33-34

[10]   Capps, Donald (2002) p. 25.

exposed to the disapproving gaze of others . . . Doubt is reflected in excessive self-control." [11]

The Stages

Table 1 Erikson's Eight Stages of Development[12]

Stage	Age	Central Thematic Conflict	Resultant Strength	Malignant Tendency	Maladaptive Tendency
1	Infancy	Trust vs. mistrust	Hope	Withdrawal	Sensory Maladjustment
2	Toddlerhood	Autonomy vs. shame and doubt	Will	Compulsion	Shameless Willfulness
3	Early childhood	Initiative vs. guilt	Purpose	Inhibition	Ruthlessness
4	Middle childhood	Industry vs. inferiority	Competence	Inertia	Narrow Virtuosity
5	Adolescence Fanaticism	Identity vs. identity confusion	Fidelity	Repudiation	
6	Young Adulthood	Intimacy vs. isolation	Love	Exclusivity	Promiscuity
7	Adulthood	Generativity vs. stagnation	Care	Rejectivity	Overextension
8	Aging	Ego integrity vs. despair	Wisdom	Disdain	Presumption

Without shame and doubt, one may develop the maladaptive tendency called "impulsiveness," a shameless willfulness that may lead one later on to jump into things without proper consideration of one's abilities. Worse is too much shame and doubt, which risks the malignancy called "compulsiveness" - the person who feels everything

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[11]   Ibid.

[12]   Adapted from Erikson, E. et al(1986) p. 45

must be done perfectly, and mistakes must be avoided at all costs.

The proper balance of mostly autonomy with some shame and doubt develops the virtue of "willpower or determination."

Stage III. Initiative vs. Guilt (from 3 or 4 to 5 or 6 years)

The third stage is the genital-locomotor stage or play age and corresponds to the genital stage of classical psychoanalysis. The task is to learn "initiative" while avoiding an excessive sense of "guilt."

The child can now initiate various activities on its own, and no longer merely responds to or imitates the actions of others. The child is now capable of imagining a future situation that is not a reality right now. Initiative is the attempt to make that non-reality a reality. Initiative translates into feeling purposeful.

The negative pole for this stage is guilt. Shame is the disapproval of others, while guilt is internalized disapproval of oneself. Guilt feelings may set in if the child's initiatives are constantly curtailed by the caregiver, or if his/her initiatives exceed his/her limits. If the child is made to feel that its activity is bad, that its questions are a nuisance and that its play is silly and stupid, then it may develop a sense of guilt over self-initiated activities in general that will persist through later life stages.

Too much initiative and too little guilt risks a maladaptive tendency called "ruthlessness" – the child is happy to take the initiative, but does not care who gets stepped on in achieving its goals. The extreme form of ruthlessness is sociopathy. More difficult is the malignancy of too much guilt, which Erikson calls "inhibition." The inhibited person will not try things because he or she must avoid at all costs doing something wrong, and in particular, anything about which to feel guilty. A good balance

can lead to the psychosocial strength of "purpose." A sense of purpose is something

many people crave in their lives, yet many do not realize that they themselves make their

purposes through imagination and initiative.

> The third stage is the play age, when … there emerges a set of idealized goals and thus
> the power of eventual purpose. Purpose is the courage to envisage and pursue valued
> goals uninhibited by the defeat of infantile phantasies, [sic] by an imposed sense of guilt,
> and by the fear of punishment.[13]

Stage IV - Industry vs. Inferiority - school-age (6 - 12 years)

The fourth stage corresponds to Freud's latency period. It extends from about 6

to 12 years, corresponding to the early school years. The task is to develop a capacity for

industry while avoiding an excessive sense of inferiority.

There is a vast expansion of the community of actors with whom the child

interacts. Parents and other family members are joined by teachers and peers and other

members of he community at large.

Children learn there is pleasure not only in conceiving a plan, but also in carrying

it out. They learn the feeling of success and are dissatisfied if they cannot make things

well. They want to feel productive and win recognition by producing things or achieving

competencies. Developing a sense of inferiority by not being able to complete a given

task advances a sense of incompetence in children, which may be exhibited later in life as

an inability to take up responsibility.

> The gradually resulting strength is competence, the free exercise of dexterity and
> intelligence in the completion of tasks, unimpaired by a forever threatening sense of
> inferiority. Competence becomes the basis of for cooperative participation in
> technologies.[14]

If the child leans too far towards industry, it risks the maladaptive tendency called

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[13] Erikson, E. et al. (1986) p. 34

[14] Ibid.

"narrow virtuosity." Children who are not allowed to "be children," who are pushed into one area of competence, without being allowed to development broader interests, exhibit this trait. Thrust into roles as child actors, child athletes, child musicians, and child prodigies of all sorts, they never experience "being a kid" and just playing.

Much more common is the malignancy called "inertia." Here is a fear of trying, assuming one is not good enough, becoming inert. The right balance of industry and inferiority - mostly industry, with a touch of humbling inferiority, results in the virtue called "competency."

Stage V - Ego Identity vs. Role Confusion- Adolescence (12 - 19 years)

Stage five is adolescence, beginning with puberty and ending around 18 or 20 years old. The task here is to achieve "ego identity" and avoid "role confusion." Their search to find who they are, to be independent and have peer acceptance, which becomes a central theme now.

Ego identity means knowing where one has been, where one is going, who one is, and how one fits into the rest of society. It requires molding all you have learned about life and yourself into a unified self-image. Failing this, an adolescent is confronted by role confusion; Erikson calls it suffering from an identity crisis.

Rather than have no identity, some young people seek a negative identity, an identity opposite to the one prescribed for them by their family and friends.

Too much "ego identity," is when a person is so involved in a particular role or subculture, that there is no room left for tolerance. Erikson calls this maladaptive tendency "fanaticism." Adolescents, known for their idealism, and for their tendency to see things in black-and-white, can gather others and promote their beliefs and life-styles

without regard to others' rights to disagree. The malignant tendency here is called

"repudiation" - repudiating a need for an identity. Some adolescents "fuse" with a group,

especially the kind of group that is particularly eager to provide the details of one's

identity.

Successfully negotiating this stage results in the virtue "fidelity" - loyalty, the

ability to live by society's standards despite their imperfections, incompleteness and

inconsistencies. Not blind loyalty, but fidelity means that you have found a place in that

community, a place which will allow you to contribute.

Stage VI Intimacy vs. Isolation (twenties)

Stage six is young adulthood, roughly the period of courtship and early family life

that extends from late adolescence till early middle age. For this stage, and the stages

described hereafter, Freudian theory has little to say. The task is to achieve some degree

of intimacy, as opposed to remaining in isolation. Intimacy means much more than love-

making alone; it means the ability to share with and care about another person without

fear of losing oneself in the process. Erikson writes that intimacy is

> the capacity for eventual commitment to lasting friendships and companionship in
> general and, in particular, to the genital mutuality … Here, one other … strength is love,
> … the mutuality of devotion forever subduing the antagonisms inherent in divided
> function. It pervades the intimacy of individuals and is thus the basis of ethical concern as
> elaborated in affiliative patterns.[15]

By this time the individual should have a clear sense of identity, no need to fear

"losing" oneself nor a need to prove oneself anymore. The young adult relationship

should be a matter of two independent egos creating something larger than themselves. If

a sense of intimacy is not established with friends or a mate, the result is a sense of

"isolation"—of being alone without anyone to share with or care for.

Erikson calls the maladaptive form "promiscuity," referring to the tendency to become intimate too freely, too easily, and without any depth to one's intimacy. This can be as true of friends and neighbors as with lovers. The malignancy, called "exclusion," refers to the tendency to isolate oneself from love, friendship, and community, and to develop a hatefulness in compensation for one's loneliness.

Success results in the virtue called "love." Love means being able to put aside differences and antagonisms through "mutuality of devotion." It includes not only mates, but the love between friends and the love of one's neighbors, co-workers, and compatriots as well.

Stage VII Generativity vs. Self-absorption (late 20's through 50's)

Middle age brings with it either "generativity" or "self-absorption and stagnation." Generativity is concerning oneself with others beyond one's immediate family, with future generations and the nature of the society and the world in which those generations will live. Generativity is anything, in fact, that satisfies that "need to be needed."

Those who fail to establish a sense of generativity fall into a state of self-absorption in which their personal needs and comforts are of predominant concern -- they cease to be a productive member of society. People with the maladaptation called "overextension," have too little "stagnation" in their lives and try to be so generative they no longer allow time for themselves, for rest and relaxation. More serious is the malignant tendency of "rejectivity" Much of what we call "the meaning of life" is how we participate and what we contribute. This is the stage of the "midlife crisis" -- panicking at getting older and not having experienced or accomplished what they

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[15]   Ibid. p. 37.

imagined they would when they were younger, trying to recapture their youth.

Successfully negotiating this stage results in the virtue or psychosocial strength

Erikson calls "care."   Care is an extension of love into the future. It is a concern for the

next generation and all future generations.

> This vital strength of care … is the widening concern for what has been generated by love, necessity, or accident; it overcomes the ambivalence arising with irreversible obligation. Thus care attends to the needs of all that has been generated.[16]

Some Thoughts on the First Seven Stages

Various critiques of Erikson question whether Erikson's stages still work. On one

hand, there are those who claim that the model fails to work because of examples of

children developing faster or slower than the model predicted or even cases where a stage

seems to be reached out of order. I do not think the stages were meant to be strictly

applied to specific ages. Atchley even notes "Erikson never attached chronological age

definitions to these life stages." [17] I am not a purist - I believe that each person has a

unique DNA, a unique family/social situation and a unique time in which he or she is

alive. All these play a role in triggering the developmental stages. We live in a time

where children are exposed to many things at earlier ages than they used to be. What does

this do to Erikson's model? - a model that he claimed for a strength was psycho-social

and depended greatly on the way society socialized its members in the roles that were

expected. Erikson's greatest contribution was not the specific stages he identified, but the

idea that our psyches react with our environment to produce who we become. The same

psyche in different societies or social situations would produce different results.

Does earlier exposure cause the stages to move faster? Or does the combination of

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[16]   Ibid. p. 37.
[17]   Atchley, Robert (2009) p. 31

a younger developed body and mind in what used to be a more mature social situation

create a new dilemma, with a new pair of opposites that would have never occurred to

Erikson. Examples come easily to mind. Children are being sent to communal day care at

younger and younger ages, which means that they begin to interact with peers at a much

younger age. What does it mean when babies are encountering other babies, not to

mention the plethora of caretakers, before they have even finished mastering basic trust?

More relevant to our situation is that people are living longer and are healthier and

often working longer. But they are not always the same people. We are seeing more

elders in the work force who often are not there by choice, but by economic necessity.

What developmental stage is the eighty year old working the counter at McDonalds? On

the other side we see people retiring at 50. Have they ended their generativity? They are

involved in the world, but from a situation of leisure. Where in Erikson's stages of

development does this person fit? Women are bearing children at later and later ages.

With egg donation, it is not extraordinary to have women becoming pregnant in their

fifties, with children in the house through their seventies. Divorce has completely

changed the family structure since Erikson first proposed his theory. The man who in his

fifties or sixties marries a woman 25-30 years his junior could still be parenting the

children in his eighties which he sired in his sixties. Not to mention the rise of single

parent families and all sorts of custody arrangements, which on more than a few

occasions involve aging grandparents. We are becoming a country where there is no

longer a "normal" when it comes to family structure.

Another criticism of Erikson is that his model is severely culture-bound. Erikson

and the stages are a product of a Western Judeo-Christian culture. Efforts to export this

model to other cultures have been problematical. If, to quote Atchley again, the "dilemmas arise from having to adapt inwardly to changes that come with moving from one culturally defined life stage to another,"[18] then different culturally defined life stages will produce a different set of dilemmas. Erikson's stages are just constructs designed to represent the conflicts that arise when the human animal with an inborn pattern of instincts and stages of physical development interacts with a given social milieu.

Human beings are very adaptable, reprocessing of previous stages is going on all the time. Each waking hour (and maybe some sleeping ones) we are re-evaluating what our different balances are. So do the stages matter at all? There are times in our lives when we are more likely to reach a stasis point in our constant balancing of our systonic/dystonic pairs. I am speaking now about individuals and not new stage theory. Robert Atchley in his description of continuity theory, talks about feedback systems. "Systems are created to meet needs and modified to take into account feedback from using the results of the systems." [19] If we were to look at each of the systonic/dystonic pairs as a mini-system, the feedback that we receive from the system, then affects the system. Points are reached where the current balancing in our mini-system works for us. We find that level by shifting the balance in one direction and getting feedback that we need to compensate in the other direction. We move back and forth, eventually stabilizing at a particular level. If we find that the level is stable for a period of time, we may stop checking it so often. Shortly, other systems assume that this system will remain at that level and we become invested in that equilibrium point. Then, if the situation suddenly changes, it becomes difficult (but not impossible) to reset that level, because we have

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[18] Ibid.
[19] Ibid.p. 50

become used to it, other systems have found equilibrium using our former equilibrium

point as a reference point. Erikson suggested that as a society, there are a number of

points in our socialization where we can expect certain points of stability to occur. Some

of these are more universal than others.

C. <u>Development in Old Age</u>

Erikson's model continues with his last stage, number eight. Later his wife Joan, using his notes, and their combined experiences presented a ninth stage, additionally based on theories by Lars Tornstam. Robert Peck, writing before the idea of a ninth stage, takes Erik Erikson's eighth and final stage and subdivides it into three dilemmas elders must face before reaching final integrity. The dilemma of how to define oneself, once one no longer has work or family role to use; the dilemma of how to transcend the disintegration of the body and mind; and the dilemma of how to overcome the terror of non-being, death.

<u>Stage VIII Integrity vs. Despair (60's and 70's)</u>

The task of this stage is to develop "ego integrity" with a minimal amount of "despair."   Ego integrity is coming to terms with your life, and thereby also coming to terms with the end of life. If you are able to look back and accept the course of events, the choices made, your life as you lived it, as being necessary, then you need not fear death. At the other extreme is the individual who looks back upon his life as a series of missed opportunities and missed directions; now in the twilight years he realizes that it is too late to start again. For such a person, the inevitable result is a sense of despair at what might have been. This "is often hidden behind a show of disgust, misanthropy, and contempt for other persons and institutions. There is also a self-contempt owing to little sense of comradeship with those whose lives and achievements mirror human dignity and love." [20]

Ever focusing on the interplay between how social situation affects the psyche of the individual, Erikson wrote,

> [T]here can be little doubt that today the discontinuity of family life as a result of dis-
> location contributes greatly to the lack in old age of that minimum vital involvement that
> is necessary for staying really alive … old patients seem to be mourning not only for time
> forfeited and space depleted, but also … for autonomy weakened, initiative lost, intimacy
> dismissed, generativity neglected - not to speak of identity potentials bypassed or, indeed,
> an all to limiting identity lived … in old age all qualities of the past assume new values[21]

This foreshadows what his wife will later write in the extended version of this work.

The maladaptive tendency in stage eight is called "presumption." This is what happens when a person "presumes" ego integrity without actually confronting the past or accepting the difficulties of old age. The malignant tendency is called "disdain," by which Erikson means a contempt for life, one's own or anyone else's. Like all malignancies, some amount of disdain is natural. "[D]isdain … must up to a point be recognized as a natural and necessary reaction to human weakness and to the deadly repetitiveness of depravity and deceit." [22]

Someone who approaches death without fear has the strength Erikson calls "wisdom." "This we have described as a kind of informed and detached concern with life itself in the face of death itself … a more or less open disdain is the antipathy counterpart to wisdom - a reaction to feeling … an increasing state of being finished, confused, helpless." [23]

> Integrity has two major attributes. The first is an acceptance of our life … and of the fact
> that our life is our own responsibility. If the identity stage involves discovering our sense
> of "I," the integrity stage means endorsing it … Erikson also emphasized acceptance of
> our death … The second attribute of integrity concerns our participation in the succession
> of generations. The previous stage involved care of future generations. This stage centers
> on one's comradeship with members of preceding generations.[24]

At the same time this stage is usually filled with losses. The individual finds that

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[20]   Capps, Donald (2002) pp. 29-30.

[21]   Erikson (1997) p. 63-4

[22]   Ibid. p. 64.

[23]   Ibid. p. 61.

[24]   Capps, Donald (2002) p. 29

battles fought in earlier stages, need to be struggled with again. We lose our sense of

usefulness or generativity, as we retire from jobs we have held for years, find our duties

as parents coming to a close, and often find that our input is no longer requested or

required. There is also the sense of biological uselessness, as the body no longer does

everything it used to. The people we were close to die, become ill or demented. Often we

lose the connection to neighborhood, as families move away and we must renegotiate

how much isolation we have in our lives.

> In brief, successful resolution of the eighth stage takes place when the individual can
> accept what has gone before as inevitable and satisfying, and can also accept without fear
> that death will occur probably in the not too distant future. This will result in ego
> integrity. If a person feels that his or her life has been a failure, and that it is too late to
> start in a new direction, then he or she will be filled with despair.[25]

Stage IX: Dystonic vs. Systonic (80's, 90's and 100's)

In her nineties, Joan Erikson, feels the eight stage model no longer encompasses

where she finds herself on the developmental paradigm. She re-issues and extends her

husband's last work, *The Life Cycle Completed*, originally written when he was also in

his nineties. Joan Erikson believed that it was not until their late eighties and early

nineties that both she and her husband really confronted their aging selves, and this led

her to the belief that development, accompanied by continued life satisfaction, continued

beyond the eighth stage.

> Old age in one's 80s and 90s brings with it new demands, reevaluations, and daily
> difficulties. These concerns can only be adequately discussed, and confronted, by
> designating a new ninth stage to clarify the challenges.[26]

As acceptance and endorsement of one's life is a critical part of negotiating Stage

Eight, the acceptance of the decline of bodily functions is critical in the ninth stage.

Where the former stage required identification with the generations of the past, the

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[25]   Brown, et al (2003) p. 416 citing Erikson, (1963)

current stage "looks forward and outward beyond the self. This can involve a decline in

self-centeredness …[and] a move beyond all fear of death rather than mere acceptance of

its inevitability, and a redefinition of time, space, and objects may take place." [27]

Echoing her husband's earlier observation that seniors face challenges along each

of the formerly decided crises, she suggests that every single stage is revisited, only this

time the dystonic element is assumed to be paramount. Despair is "ever present" to a

stage nine elder. Yet

> Ninth stage despair reflects a somewhat different experience than that affiliated with the
> eighth stage. Life in the eighth stage includes a retrospective accounting of one's life to
> date…In one's eighties and nineties one may longer have the luxury of such retrospective
> despair. Loss of capacities and disintegration may demand almost all of one's attention
> … it is enough just to get through a day intact, however satisfied or dissatisfied one feels
> about one's previous life history.[28]

Mistrust becomes a regular occurrence as ninth stagers are forced to mistrust their own

capabilities as even the simplest of daily activities present opportunities for difficulties

and failure. "Doubt returns to seniors as they no longer trust in their autonomy over their

bodies and life choices." [29] The shame of a loss of self-control is a constant possibility.

With their diminished physical capacity added to their lack of a defined role, ninth stage

seniors are often faced with a sense of inadequacy whenever they attempt something.

Their initiative crumbles in the face of doubt, bringing guilt at their lack of effectiveness

in its wake. With age, their competencies diminish. All of their senses become blunted

and difficult to depend on. Their memories fail, their thinking slower, their speech may

be slurred, and their stamina minimal. Fear of failure is a fixture in their lives. With

industry flagging, a sense of inferiority predominates. "To be confused about [one's]

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[26]   Erikson (1997) p. 105

[27]   Brown, et al (2003) pp. 415–426

[28]   Erikson (1997) p. 113

[29]   Ibid. p. 108.

existential identity makes you a riddle to yourself … With aging, you may feel a real uncertainty about status and role." [30] With no job, no family, no place in the social hierarchy, what source of identity is left? The ninth stage seniors have seen almost all their contemporaries die. Their families are often distant. A sense of isolation pervades their life. Even social conventions, as to how to meet people often have changed from what they are used to. "Generativity … is no longer expected in old age. … However, not being needed may be felt as a designation of uselessness. When no challenges are offered a sense of stagnation may well take over." [31]

So how is one to progress or develop in the ninth stage, despite the prevalence of dystonic life experiences? Joan Erikson simply writes, "if elders can come to terms with the dystonic elements in their life experiences … they may make headway on the path leading to [further development]." [32] I find this statement cryptic. What does she mean by "come to terms with" ? I suggest that she is talking about a radical change of expectations. Peck's theories on this are presented subsequently. The successful ninth stager no longer expects that everyday activities will happen on schedule without problems. If one is able to see every dystonic event, not as a setback, but rather a confirmation of one's situation in life, one can let go of the insults that come with the deterioration of the body and mind. By accepting each limitation as a normal part of the aging process, or at least your particular aging process, one is free to enjoy what pleasures are left in life.

When Joan Erikson talks about the potential for further psychosocial development beyond the eighth stage, she draws upon the theory of "gerotranscendence" put forward

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[30]   Ibid. p. 110.
[31]   Ibid. p. 112

by Lars Tornstam.

> This theory suggests that living into old age and facing its challenges brings about a shift in meta-perspective from a materialistic and rational view to a more cosmic and transcendent one. This is normally accompanied by an increase in life satisfaction. Tornstam believed that wisdom is identified with gero-transcendence[33]

For her, this changes the outlook for the ninth stage completely. No longer are the extreme old simply to let go of this world and wait for death. As with every other stage of development, there are possibilities for growth and change. It allows the stage model to continue to expand its span of relationship, which constantly grows from mother to family to school, peer group, social network, future generations and finally in stage eight the generations of the past. Here it is "cosmic and transcendent."

> In describing the cosmic dimension of transcendence Tornstam claims

> the individual no longer considers him/herself particularly significant, but has a growing feeling of being part of a larger context, part of 'the universe'. The fear of death is lessened, while there is an … affinity with former, present and coming generations. … time …is no longer as important as it once was. Moreover, the boundaries between past, present and future are erased, causing 'then' and 'now' to flow together. The mystery dimensions in life are accepted, and there is no longer a need to explain and understand everything. [34]

Tornstam has pursued both qualitative and quantitative studies. One piece of realia his theory tries to explain is the increased solitude that ninth stagers seems to seek out. Is this a good or bad thing? Formerly, it had been taken to be a sign of withdrawal and possible depression. Now it could be part of the natural progression towards a healthier final stage. Tornstam certainly includes it as part of his understanding of the gerotranscedent individual.

> [T]he gerotranscendent individual typically experiences a new understanding of fundamental existential questions – often a feeling of cosmic communion with the spirit of the universe, a redefinition of time, space, life and death, and a redefinition of the self and relationships to others. The individual becomes, for example, less self occupied and

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[32]   Ibid. p. 114
[33]   Brown et al. (2003) p. 417.
[34]   Wadensten, Barbro and Doris Ha¨gglund. (2006)

> at the same time more selective in his/her choice of social and other activities. There is …
> a decreased interest in superfluous social interaction. Positive solitude becomes more
> important.[35]

We see an example of this last point in Atchley's longitudinal study, where he found

"compared with when they were 50, a large proportion of respondents said that they …

got more enjoyment from their inner life. When we see an elder just sitting, we are quick

to assume that there is nothing going on, but we may be wrong. I had the following

conversation with an 80 year-old woman:

> There are times when you seem to be in a far off-place in your mind,' I said. 'Yes,' she
> said. 'Is it a pleasant place?' I asked. 'Oh my, yes,' she said. 'Can you tell me what it's
> like?,' I asked. She replied, 'Words don't describe it. It's warm and cozy. Thoughts come
> and go, but are of no importance. I feel completely at peace.' [36]

MacKinlay (2001) also reports "an increased sense of interiority" which agrees with

Neugarten's (1968) findings that "With increasing old age, ego functions are turned

inward … there is a movement of energy away from an outer-world to an inner world

orientation."[37]

> A major element in Tornstam's theory is the need to reflect on one's life.

> According to the theory, gerotranscendental development requires openness to
> reinterpretations and reevaluations in life. …we are *always* making new interpretations of
> the past and in our life narratives describing the lived life in accordance with the plot we
> have chosen for the narrative.[38]

This is exactly the process that Erikson employs in his eighth stage to arrive at integrity

or despair. One difference, according to Tornstam, is that the older an individual is, the

more of a gerotranscendent perspective will be applied in evaluating one's life.

Secondly, in Erikson's theory, the individual is looking back at the life lived, but from

within the same old paradigm. Gerotranscendence implies a looking forward and

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[35]   Tornstam, L. (2003)

[36]   Atchley, R. (2009) pp. 25-26

[37]   Neugarten, Bernice L. (1968) p. 140

[38]   Hyse, K., Tornstam, L. (2009)

outward, with a new view of the self and the world.

This is an example of what I discussed at the end of the presentation of the first seven stages. Here we have new sets of circumstances - all the dystonic experiences listed by Joan Erikson or the gerotranscendent experiences cited by Tornstam, that were not accounted for in the old paradigm. The solution was a new stage. In this case, there was a place for it conveniently after the eighth stage; but what about changes that do not fit as well into the chronological flow of the stage model? A stage is just a large group of people going through a similar crisis in their lives at a similar point of development with enough commonality of experience to come to similar resolutions. The crisis must be severe enough to destabilize their earlier set of equilibrium points.

Robert Peck (1968) subdivided Erikson's eighth stage further, into three tasks, giving each task a systonic and dystonic pole a la Erikson. Negotiating these crises is an important step to reaching Erikson's final (in the original model) strength, integrity. These crises are as much event-driven as they are developmental.

Ego differentiation vs. Work-role preoccupation

In Western society, people tend to use their occupations as a major source of their identity, whether it be a career or within the family as child-rearer. As one approaches or enters the eighth stage, usually, the children have left home and people begin to retire from their careers. They are no longer getting the daily reinforcement of their self-worth. For those retiring from the work-place, retirement also comes with a diminished and fixed level of pay. Peck suggests that this creates a developmental crisis as to whether the individual can develop a:

> General, crucial shift in the value system by which the retiring individual can reappraise
> and redefine his worth, and can take satisfaction in a broader range of role activities than

just his long-time specific work role. (p.91)[39]

After years of using one's occupation as part of one's self-definition, the individual comes to ask herself, "Am I a worthwhile person without my work-related identity?"

If one develops new roles and new sources of self-esteem, or is able to find meaning in life through ways not related to the occupation now ended, ego differentiation occurs. If not, the loss of meaning can lead one to despair and even suicide.

Robert Katz warns that when we talk about retirement and the loss of role and status that comes with it, we are speaking from "a middle-class orientation and find ourselves generalizing on the basis of the social group with which we are most familiar."[40]

> Upper class members whose income has been derived from ownership of property or of stocks and bonds do not make a "role exit" … For the rich, the advance of the years also has significance of course, … But there is no less self-esteem. They are not rejected by a social order that defers to power, wealth, and acknowledged social status. Far from being abandoned by their family, their friends, and the community, they continue to command respect, hold positions of leadership on boards of institutions, and maintain the quality of their life. Wealth does not command immortality, to be sure, but it normally discourages disrespect.

However, accepting Katz's caveat, for the vast majority of people, Peck's developmental crisis applies.

Body transcendence vs. Body preoccupation

As we enter old age, our bodies begin to deteriorate. Our stamina decreases, we take longer to recuperate from injuries, our skin begins to wrinkle, and the accumulation of wear and tear causes painful conditions. For many, serious incapacitations occur. Peck writes

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[39]   MacKinlay, Elizabeth. (2001) . p. 56.

[40]   Katz, Robert L. (1975).

> For many people those elder years seem to move in a decreasing spiral, centered around
> their growing preoccupation with the state of their bodies.[41]

Alternatively, others are able to find ways to transcend their physical limitations and use

sources of pleasure and self-respect not dependent on youthful beauty and bodily

integrity. To the extent they succeed, Peck says they achieve body transcendence,

otherwise their body-preoccupation may lead to despair.

Both of these stages touch on existential questions of what is of vital importance

to the individual. How will I define myself? What will my future be like? Has it been

worthwhile? MacKinlay points out that these are as much spiritual questions as they are

psychosocial and Peck will be addressed again in the next chapter of this project.

Ego transcendence vs. Ego preoccupation

Modern society has added many years to one's expected life. But inevitably we

move towards death. It is no longer unusual to have the knowledge of a condition that

will inevitably claim our lives and still have time, even seemingly healthy time, to live.

The confrontation with our own mortality is the final stage proposed by Peck. Can we

live happily with hope even while knowing the end of our physical existence is

imminent? Peck suggests that the key is to look beyond one's own life

> to make life more secure, more meaningful, happier for the people who will go on after
> one dies … contributions to the culture, family and friends, may, indeed, be the only
> knowable kind of self-perpetuation after death. (p. 91) … Peck suggests that 'this kind of
> adaptation … may well be the most crucial achievement of the elder years.'[42]

Tornstam lists Peck, as well as Erikson, as a source for his theories. We find

Peck's tasks accounted for within gerotranscendence. With regard to ego transcendence,

we are told that the gerotranscendent individual no longer considers himself/herself

particularly significant, but has a growing feeling of being part of a larger context, part of

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[41]   MacKinlay, Elizabeth. (2001) . p. 56.

the universe. The fear of death is lessened, while there is an affinity with former, present and coming generations. A development of body transcendence occurs as well, whereby the individual is no longer obsessed by his/her body, but takes care of it nonetheless.

Peck's three tasks are perfect examples of what I was referring to in my discussion after presenting the ninth stage. Here we have three, probably overlapping, tasks which each create a destabilization of our equilibrium point. While they all occur in the eighth stage, there is no order to them that works for everyone. Conceptually, we can see them as helping clarify part of what is happening during the eighth/ninth Eriksonian stage, but it becomes difficult to diagram or present in the same structural format. This becomes even more complicated if we accept an explicit ninth stage, given that at least two of the three tasks are major concerns in both the eighth and ninth stages.

Tornstam's gerotranscendence is difficult to really understand. It feels like a mystic trying to explain his mystical experience. The words are just an approximation of a reality or experience that the speaker cannot fully express to the listener. Tornstam and his students have spoken with gerotranscendent seniors; I have not. It is difficult to grasp an alternate reality without a reference point to use.

On another issue; Erikson's understands "care," the end-product of generativity vs. self-absorption, as connecting to all generations through all time. That seems more in line with Stage nine. I do not believe care, in stage seven, generativity vs. self absorption, can extend love more than one or two generations in the future. Even that would be quite an achievement. One, I would think, usually reserved for the next stage. The way Erikson's stages seven, eight, and nine are currently laid out also creates a "scalability problem". If stage nine is really a new stage, there should be continuous growth in one's

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[42]   Ibid. pp. 57-58.

"reach of care." I see it as similar to Maslow's concentric circles.   First we care for

ourselves, then our family, then "my larger family," enlarged to include my group

identities. This is stage seven, for we have yet transcended our group identifications. We

would still see ourselves as part of groups whose betterment we sought. Only then, in

stage eight do we contemplate "my generation," humanity currently alive plus looking a

few generations forward for whomever we consider to be "my family." Only at stage

eight would we transcend our group identifications and come to understand that there is

only one group, mankind. We may even look a few generations forward. It is at this point

we can enter stage nine with the hope to grow enough to reach Tornstam's state of

"cosmic communion with the spirit of the universe." The stages are periods of growth.

We hope to emerge from a stage at a different place from when we entered, on whatever

dimension we are looking. This process I just suggested seems also to fit much better

with the system model I suggested earlier, that works behind the stages through iteration.

Jumping from stage to stage is just a device, it isn't really happening. Discontinuities tend

to make a system breakdown (both economic and mental). Continuous change can be

accommodated, and new equlibria reached.

D. Life Review

According to Erikson, the challenge in the eighth stage of the life cycle is to emerge from

this stage with integrity to avoid despair. Implicit in the definitions of what leads to

integrity or despair is a review of one's life.

> Life in the eighth stage includes a retrospective accounting of one's life to date; how
> much one embraces life as having been well lived, as opposed to regretting missed
> opportunities, will contribute to the degree of disgust and despair one experiences.[43]

To the extent individuals can accept that theirs was a life that was led in accordance with

their accepted values, and having been sufficiently generative, they can hope to feel what

Erikson calls integrity. To the extent that one feels that one's life was wasted, or lived

counter to one's values, one experiences despair. Either way, one is engaged evaluating

one's life.

Robert Butler put forward the proposition that reminiscing in old age is a natural

process and, what heretofore had been looked upon as a sign of psychological

dysfunction, was actually a normal process.

> I conceive of the life review as a naturally occurring, universal mental process
> characterized by the progressive return to consciousness of past experiences, and,
> particularly, the resurgence of unresolved conflicts; simultaneously, these revived
> experiences and conflicts can be surveyed and reintegrated. Presumably this process is
> prompted by the realization of approaching dissolution and death, and the inability to
> maintain one's sense of personal invulnerability.[44]

He offers as further support that the life review is prompted by the perceived

imminence of death, "the fact that it occurs not only in the elderly but also in younger

persons that expect death - for example the fatally ill or the condemned.[45] He further

suggests:

> As the past marches in review, it is surveyed, observed and reflected upon by the ego.
> Reconsideration of previous experiences and their meanings occurs, often with
> concomitant revised or expanded understanding. Such reorganization of past experience
> may provide a more valid picture, giving new and significant meanings to one's life; it
> may also prepare one for death, mitigating one's fears … it seems likely that in a large
> majority of the elderly a substantial reorganization of the personality does occur.[46]

Their literature does not have an agreement on the exact mechanism of how this

works.

> By looking back, the elderly may have a better perspective of what really matters in life.
> They may conclude that many of their past activities that they thought had meaning were
> not necessarily fulfilling, and conversely, some past experiences which they had
> previously incidental zed, may have far greater importance. This process may help the

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43   Erikson. (1992) p. 113.

44   Butler, Robert (1963) p. 330

45   Ibid. p. 331.

46   Ibid. p. 332.

elderly to bring their lives into a sense of unity and acceptance.[47]

Butler writes,

> Memory is an ego function … It serves the sense of self and its continuity; it entertains us; it shames us; it pains us. Memory … can be explanatory and it can deceive. Presumably it can lend itself toward cure. The recovery of memories, the making the unconscious conscious if generally regarded as the basic ingredients of the curative process. Psychotherapists tend to associate self-awareness with health, and lack of awareness with morbidity.[48]

Since being proposed by Butler, life review has become a recognized tool for use with senior citizens. Other research[49] has suggested life review has numerous therapeutic benefits.

> Persons who reminisce may gain a sense of continuity between past and present, gain deeper insight into their past and present relationships, … build self-esteem, resolve conflicts, acquire a sense of life achievement, and may assist persons to solve problems in the present by identifying past strengths and methods of coping with difficult life situations.[50]\

Reminiscence plays an important role in Tornstam's thinking as well. While from the perspective of Erikson's psychodynamic theory, reminiscence could be seen as an opportunity to change and develop within the same understanding of one's current reality. In a gerotranscendental perspective, it contributes to the change and reconstruction not only of identity, but also of the way people understand reality.

In terms of what I have been discussing about systems and equilibria, the life review is like a small perturbation of the system. Sometimes through a re-evaluation, we reclassify an event so that it no longer supports our sense of shame or our feeling of isolation. Find enough of these and there will be movement. In theory, the goal is to "move" enough "supports" that a perceptual shift in attitude about oneself will occur.

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[47]   Sulosky, Donald.) p. 3
[48]   Butler. Robert (1963) p. 337.
[49]   Beecham, Anthony and Kurtz
[50]   Lashley (1993) p. 138 quoted in Beecham et al. p. 29.

I have at my disposal a tool to improve the lives of the seniors I work with. This project will be using this technique, life review, which has at its core, Erikson's idea of reevaluation of one's past in the search for integrity to work to resolve the existential tasks identified by Peck and possibly move towards gerotranscendence. In doing so I hope the seniors I work with resolve some of their open issues and conflicts and move closer to being ready for the end of their lives.

Chapter 3:   __THEOLOGICAL PERSPECTIVE__

A. Spirituality Among the Elderly

The term spirituality has taken on quite a variety of meanings. " 'Spirituality' has many fluctuating definitions … I have encountered over two hundred different definitions of the word,"[51] writes one author; another says, "If I were to ask what is 'spirituality' or what is 'spiritual' I am sure I would probably get about … 40 definitions depending on how many people I asked." [52]

Writing on "spirituality" in a Jewish context, modern Jewish thinkers have proposed quite a variety of definitions:

> Spirituality may inclusively be regarded as the sum of the efforts of the human psyche, individually and collectively, to attune to the impulses and rhythms of the universe, whether internal to the individual or external in nature. (Dr. Martin Cohen, HUC-JIR)
>
> Man's spiritual life can easily be thought of in three divisions: his pursuit of truth, of beauty and of moral goodness. (Rabbi Roland Gittelsohn, [1910-1995] Temple Israel, Boston)
>
> Spirituality, as I understand it, is noticing the wonder, noticing that what seems disparate and confusing to us is actually whole. (Rabbi Nancy Fuchs-Kreimer, Reconstructionist Rabbinical College, Philadelphia)
>
> The striving for life in the presence of God and the fashioning a life of holiness appropriate to such striving. (Rabbi Arthur Green, Brandeis University, Boston)
>
> The cognitive and/or behavioral activities designed to help individual and community connect to God. (Deanne H. Shapiro and Johanna Shapiro, psychologist at the University of Ca. Irvine)
>
> The immediacy of God's presence. (Rabbi Lawrence Kushner, Rabbi in residence, HUC-JIR)
>
> Spirituality is essentially a way of responding to God, becoming conscious of God. (Rabbi Jeffrey Weissblatt … Temple Ohev Shalom, Harrisburg, Pa.)
>
> Spirituality is the process through which the individual strives to meet God. (Rabbi Kerry Olitzky, Jewish Outreach Institute, New York.)
>
> A highly personal outlook about what is sacred about us; it is the expression of our most deeply held values, and it is that sense of higher purpose that guides our daily lives. (Dr.

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[51] Underwood, LG, (2006)
[52]   Baker, David C. (2003)

David A. Ariel, Cleveland College of Jewish Studies) [53]

A common thread that seems to weave through these different definitions is that spirituality is the human response to confronting the sacred/God/Divine in our lives (implicit in Gittlesohn and Ariel), as well as the way in which that confrontation takes place. MacKinlay,[54] presents various definitions from a Christian context.

> Thibault (1995) says spirituality refers to [the way] … the individual works out their sense of meaning and relationship … spiritual is what gives depth and meaning to life and the spiritual dimension is worked out in both the horizontal dimension, in relationships with others, and also the vertical … of relationship with God, or in some sense of the other, the unexplainable.

> Balthazar (1965): Spirituality … is the consequence and expression of the way in which he understands religion … his ethically committed existence; the way in which he acts and reacts habitually throughout his life according to his objective an ultimate insights and decisions. (p.5)

> Holmes (1985) … a human capacity for relationship with that which 'transcends sense phenomena,' the subject perceives this relationship as an expanded or heightened consciousness independent of the subject's efforts. This is grounded in a historical setting and exhibits itself in creative actions in the world.

Again, we see spirituality as the connection to God or sacredness and the manner in which one conducts (or implements the sacred in) one's life. However, Thibault makes explicit that spirituality refers to a "sense of meaning … what gives depth and meaning to life." Meaning is that which creates a justification for our existence. This idea of needing to find meaning is the same as Cohen's "attunement," Gittelsohn's "pursuits," Fuchs-Kramer's "wholeness," Shapiro and Shapiro's "connection," Olitzky's "meeting," and of course, Ariel's "values" and "higher purpose." It is that which addresses Paul Tillich's second anxiety, "the anxiety of meaninglessness and emptiness," discussed at a future point.

Given so much use of "God language," it is important to differentiate between

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[53] Sonsino, Rifat. "Jewish Definitions of Spirituality" in Matlins, Stuart ed. *The Jewish Lights Spirituality Handbook*. Jewish Lights Publishing. Woodstock, Vt. 2001 pp.9-10
[54] MacKinlay, Elizabeth. (2001) pp 49-50.

religiosity and spirituality. Baker warns:

> Spirituality then, focuses on a belief in, or a relationship with, a higher power; it is the aspect of life that gives purpose, meaning, and direction, and which may encompass religion. When many people think about spirituality, they confuse spiritual with religious, but spirituality is more than a religious belief. Spirituality is a larger concept that deals with meaning, purpose and direction in life.[55]

Robert Atchley, quoting Robert Wuthnow (1998) comments that "there is a growing tendency to use *spiritual* to refer to inner experiences and *religious* to refer to external experience connected with organized religions."[56]

This need for clarification is recognized by the National Institute of Aging which, along with the Fetzer Institute, writes the following:

> Religiousness has specific behavioral, social, doctrinal, and denominational characteristics because it involves a system of worship and doctrine that is shared within a group. Spirituality is concerned with the transcendent, addressing ultimate questions about life's meaning, with the assumption that there is more to life than what we see or fully understand. Spirituality can call us beyond self to concern and compassion for others. While religions aim to foster and nourish the spiritual life—and spirituality is often a salient aspect of religious participation—it is possible to adopt the outward forms of religious worship and doctrine without having a strong relationship to the transcendent.[57]

Underwood echoes this and suggests some rationales:

> The ''religious'' is tied more to doctrinal, denominational orientations and to external aspects such as church attendance. Someone could be outwardly religious, yet not have a strong relationship to the transcendent. The religious orientation can be motivated by social needs or superstition and can exist without the spiritual.[58]

MacKinlay in her own definition of spirituality affirms the above, but adds that spirituality is "[the] sense of meaning [that] becomes the guiding force within the individual's life. Human spirituality must also involve relationship with people … It is that which searches and yearns for relationship in life and for meaning in existence." [59]

She goes on to say:

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[55] Baker, op cit. p. 52.
[56] Atchley (2009) p. 15.,
[57] Fetzer Institute, National Institute on Aging Working Group: (1999) p. 2.
[58] Underwood, Lynn G. Applications to Persons with Disability" (2000)

> Many people in Western society do not give much credence to the spiritual dimension either in themselves or others … A certain degree of denial of the spiritual … has left many people without the strategies for achieving (w)holistic well-being. In many ways people have become alienated from the spiritual; there is a great need to redress this alienation in our lives. The search for spiritual wholeness is a life-long search for each human.[60]

The theologian, Paul Tillich, in his book *The Courage to Be*, describes three types of existential anxieties facing the human condition - the anxieties of death, of meaninglessness, and of condemnation.

> I suggest that we distinguish three types of anxiety according to the three directions nonbeing threatens being. Nonbeing threatens man's ontic self-affirmation, relatively in terms of fate, absolutely in terms of death. It threatens man's spiritual self-affirmation, relatively in terms of emptiness, absolutely in terms of meaninglessness. It threatens man's moral self-affirmation, relatively in terms of guilt, absolutely in terms of condemnation. The awareness of this threefold threat is anxiety appearing in three forms, that of fate and death (briefly, the anxiety of death), that of emptiness and loss of meaning (briefly, the anxiety of meaninglessness), that of guilt and condemnation (briefly, the anxiety of condemnation). In all three forms anxiety is existential in the sense that it belongs to existence as such and not to an abnormal state of mind as in neurotic (and psychotic) anxiety.[61]

Two of these bring to mind Robert Peck's final stages of aging. At the center of the tension between "ego differentiation vs. work-role preoccupation" is "the anxiety of meaninglessness."   At the center of "ego transcendence vs. ego preoccupation" is "the anxiety of death."

Peck's stages are tasks for those in Erikson's eighth (and ninth) stage of life. The struggle here is to develop integrity, with minimal despair. Both Tillich's anxieties and Peck's additional tasks must be dealt with to reach true integrity. We need to have a reason for existing (meaning), if we are going to continue living. We want to be able to look at our lives, past, present, and whatever future we have left and be able to say we are/were/will be good in an ethical sense and had/have/will have an impact by having lived. Tillich reminds us that these are not optional questions and are not faced only by

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[59] MacKinlay, Elizabeth. (2001) p. 51
[60] Ibid. p. 52

the old, "Man's being, ontic as well as spiritual, is not only given to him, but also

demands of him. He is responsible for it; literally, he is required to answer, if he is asked,

what he has made of himself." [62]

This "asking" is a necessary part of eighth stage development and required to

reach Eriksonian integrity. The elderly feel the clock ticking; they have little time in

which to find answers. MacKinley writes:

> It is suggested that older adults may reach a point at which they become more attuned to facing the end of life; a sense, perhaps, of running out of time, and this sense may provoke a heightened search for final meanings with the individual. The person coming to this realization has choices: to face the reality of time, or to deny; to continue to grow spiritually, or to stagnate; the opportunity for developing spiritual integrity and hope, or for final despair.[63]

Time stops being measured as how long we have been here and becomes how much

longer before the end.

Furthermore, our society, has no role in which the elderly would naturally fit. At

one time, elders were looked up to as repositories of tradition and wisdom. With the fast-

changing world we live in, seniors can barely keep up with the new vocabulary and new

ways to communicate. The values, of which they thought they were the guardians, are

obsolete and replaced with value systems with which they are uncomfortable and

unfamiliar.

We are a society that defines itself by what we do, but we have given our seniors

nothing of consequence to do. After giving up work roles through retirement, and

parental roles with the maturing of children, the healthy old feel Peck's first task acutely.

What will their new roles be? For the first decade, if their health holds out, many find

new roles as volunteers, entrepreneurs, grandparents and students. They still have to deal

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[61] Tillich, Paul (1952) p. 41
[62] Ibid. p. 51.

with the fact that many of the roles available to them will pay less, if at all; will be at a lower level of status; and will not be the constant reaffirmation of their self esteem as their careers once were.

But as their bodies betray them, riddling them with pains and disabilities, they find themselves less able to be independent, less able to perform even the new roles and realize that the question of ego differentiation was only postponed. The way forward in life is murky, as now the task of body transcendence vs. body preoccupation becomes a major challenge. Resolving both tasks can be interrelated. It is much easier to transcend bodily pain and dysfunction, if there is a clear reason to live - if there is meaning - if there is something that brings one joy. Furthermore, learning to transcend some of our bodily preoccupation, particularly embarrassment of how old we look, could open up formerly unconsidered ways to find meaning. I suggest that in our search for meaning to carry on, we are simultaneously addressing Tillich's third anxiety of guilt and condemnation. One would presume that we would want to look positively at ourselves and would not commit ourselves to an immoral future, unless we have already given up to despair. This transcendence, finding a way and meaning to live, is the spiritual quest we first described. So in old age, we all become spiritual seekers (except those who have already arrived).

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[63] MacKinlay, Elizabeth. (2001) p. 62.

B.   Life Review, Erikson, and Judaism

In this section I want to show that streams of Jewish thought are in agreement

with Erik Erikson's stage development theory and the practice of Life Review in old age,

and in some ways pre-dated this practice by centuries. In particular, I want to show that

the struggles and anxieties noted by Paul Tillich in *The Courage to Be* (1952), are very

much part of the Jewish struggle for integrity at the end of life. Robert Peck's goals of

the search for integrity in the final stage of life - bodily transcendence over bodily

preoccupation and ego transcendence over ego preoccupation - are similar to long-

standing Jewish goals.

However, Peck's problem of ego differentiation vs. work-role preoccupation has

little historical Jewish resonance and seems to be a modern creation of Western society.

> Work, in the ethos of the Western, middle-class culture, amounts to no less than the
> primary source of an individual's self-image, his identity, and his self-esteem. A person is
> valued because he produces; he occupies a status in the economy. Rolelessness or
> disengagement from the work force is, therefore, dreaded because the individual now
> suffers from anomie and knows that his community considers him at best an ornament of
> sentimental interest and, at worst, as a throwaway, used-up object.[64]

In contrast, Jewish tradition already has defined a role for the elder who has finished his

career; to devote himself to "high purposes such as the study of God's word and the

purification and refinement of the soul of man."[65]

> The passage in Genesis (3:17), presenting man as toiling life-long to earn his bread, has
> not been taken in Judaism as establishing work as anything like an absolute value. Labor
> does not serve the function of compensating or atoning for guilt. … It may be true that it
> is "natural" for man to work - in Genesis 2:15 he is enjoined to till and keep the Garden
> of Eden - but it is not the necessary condition for salvation.[66]

As Maimonides wrote in *Mishnah Torah, Hilchot, Melachim*

> The Sages and the Prophets did not hope for the coming of the Messiah in order that they
> might rule over the world, or have dominion over the other nations, or that they might be

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[64] Katz, Robert L. (1975) p. 148
[65] Ibid.
[66] Ibid. p. 148-9

glorified by other peoples, or in order to eat and drink - but that they be free to engage in the study of Torah and its wisdom, without anyone to oppress them or distract them.[67]

The first question needing to be addressed is death itself. For the anxiety of death to be felt, death must be viewed as an end. There are many ways that religions, including Judaism, deflect this recognition, by offering various theories regarding the nature of life after death. A heavy emphasis placed on the next world could have the effect of mitigating the whole impetus behind the search for integrity, at least among "believers." While Judaism does promote a concept of *Olam Haba*, the world to come, it is nonetheless clear that death is an end and not something to which to look forward.

This is illustrated in the follow Talmudic Midrash: "When Rabbi Yohanan finished learning the Book of Job he said, 'The destiny of man is to die, of animals to be slaughtered. All are destined for death.' " [Berachot 17a] We see these words repeated in Ruth Rabbah 2. We find the same sentiment expressed by an early 20th century commentator, Rabbi Baruch ha-Levi Epstein (1860-1941) who wrote in *Torah Temimah,* *"*Everyone realizes - but perhaps below the level of consciousness - that all must die, for even the holiest of men succumbed to this fate." [68] Judaism also recognizes that death can come at any time. As expressed in the Jerusalem Talmud [*Sanhedrin* 6:1] "Man - today he is; tomorrow he is not."

In the Erikson model, to achieve integrity one must review one's life and accept that it has been lived in an acceptable way. Butler suggests that, towards the end of life, seniors naturally reminisce. For him, the term "life review" connotes a "naturally occurring, universal mental process . . . prompted by the realization of approaching

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[67] Ibid. p. 149.
[68] Spero, M. H. "Death and the 'Life Review' in Halakhah" *Journal of Religion and Health*, Vol. 19, No. 4 (Winter, 1980), pp. 313-319

dissolution and death, and the inability to maintain one's sense of personal

invulnerability." [69] This potentially leads to a re-evaluation of one's history in light of

one's accumulated life experience and one's current set of values. Rabbi Jack Stern puts

it this way:

> [I]n solitude, we ponder the mysteries and meanings of life and death - including our
> own death … we know that winter is in the offing and that our days on earth will come to
> an end. So we try to fit together all the pieces of our lifetime, what is sometimes called a
> "life review": how some of what we did made a difference, and how some of what we
> failed to do could have made a difference but we didn't know at the time. … And so we
> include in our life review also the values and truths we have come to prize the most, and
> when we do that, we have in the words of the Psalmist, "Gotten us a heart of wisdom"
> (Psalm 90:12) [65-66] [70]

Avoiding this re-evaluation can, in Erikson's terms, lead to "despair." The

possibility of experiencing despair at the end of one's life is noted in Jewish texts as well.

In the following midrash a man is unprepared to meet the Angel of Death, who says:

> "Dost thou recognize me?" to which he replies, "Indeed, I do; but wherefore dost thou
> come to me just this day?" . . . "In order to take thee out of this world," says the angel,
> "for thy time has come to depart hence!" Immediately he commences to weep; and his
> cry pierces the world from one end to the other; addressing the angel, he exclaims, "Hast
> thou not already caused me to quit two worlds, to enter this world?" to which the angel
> finally replies: "And have I not already told thee, that against thy will thou art created,
> against thy will thou art born, against thy will thou livest, and against thy will thou must
> render account for thy actions before the Supreme King of Kings, blessed be He." [Deut.
> Rabbah 9:3]

As this midrash suggests, the Sages felt that preparation for death should not be

delayed to the last days or moments of life, "but rather evolve out of a time-consuming

project or task which, though based on the inevitability of death, must be undertaken well

in advance of it . . . The resolution of the "death issue" may be salient far before death

occurs." [71] A Hasidic parable illustrates this principle:

> When Rabbi Bunam lay dying his wife burst into tears. He said: "What are you crying

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[69] Butler.
[70] Stern, Jack (2003) pp.65-66.
[71] Spero, M.H. (1981-82) p. 139.

for? My whole life was only that I might learn how to die." [72]

We also find the same principle expressed in this Talmudic passage:

> Said Rabbi Eliezer, 'Return to God one day prior to the day of your death.' The students of Rabbi Eliezer thereupon asked him, 'But does a man know the day of his death?' He answered, 'Let man repent today lest he die tomorrow and, thus, all his days will be spent in penitence.' [*Shabbat* 153a]

This is not just a concept from 1500 years ago. We still find rabbis today

exhorting Jews not to wait until the last minute to repent as Rabbi Joseph Soloveitchik

writes:

> [R]epentance is not a sudden occurrence … Repentance sprouts forth and grows in the course of a long and drawn-out process typified by doubt and speculation, soul-searching and spiritual reckoning. First comes the inner stirring which generates actual repentance. A great gap often intercedes between the idea and the act, for crystallized thinking is the end-product of intuitive undefined thoughts. They take hold of one in the darkness of the night, they emerge from the innermost recesses of the secret self, and man tries to fend off some of them and hide them from himself, not to mention from others. The road that leads from these first stirrings to the actual contemplation of repentance is long indeed, and even then, after the rational idea is clearly formed in thought, it must be reborn and translated into action.[73]

In fact, there is a tendency to view human mortality as a positive, since fear of

death leads one to resolve to become better. "In the Torah of Rabbi Meir it was written,

'And behold it was very good' - and behold, death is very good." [*Gen. Rabbah* 9:5 to

Gen. 1:31.] "In other words, death is 'good' because it can be approached as a part of the

cycle of eternity, an implement for change and rebirth, an incentive for productivity." [74]

We see the same thought echoed in a modern meditation from the Reform prayer book,

"Just because we are human, we are prisoners of the years. Yet that very prison is the

room of discipline in which we, driven by the urgency of time, create."[75]

There is a major difference between the Jewish and therapeutic conceptions of life

review. According to Butler, life review occurs naturally and its effects happen

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[72] Buber, Martin (1991) p. 607.
[73] Peli, Pinchas (1984) Paulist Press. NY. p. 231.
[74] Spero (1980) Translating from *Torah Temimah*. p. 314.

automatically. He is unclear what mechanism makes life review work. In Jewish terms,

life review is called *cheshbon nefesh* (literally "accounting of the soul"), which is an

intentional act. The Jewish goal is not termed integrity, but rather *teshuvah*, repentance.

Rabbi Soloveitchik said,

> it must be recognized that the rabbinic conception of repentance always means more than
> elemental guilt or self-flagellation, but rather connotes their understanding of the most
> creative act and the most existentially fulfilling course of action man can assume[76] …
> Repentance signifies for halakhic Judaism the paragon of creativity and spiritual heroism
> … repentance is the form of all productive change, social and psychological
> modification, intrapersonal and interpersonal growth.[77]

In Jewish terms, true repentance gives resolution to Tillich's three existential

anxieties - death, meaninglessness and condemnation. By performing *teshuvah*, a Jew

obtains forgiveness from sin. Meaning comes from performing the will of God - however

the individual understands God's will. Death is transcended both through attainment of

the afterlife, but also through the legacy one leaves behind. Part of that legacy is the

teaching that one has done, the charity one has performed, and one's reputation.

Reputation is taken so seriously that character assassination is tantamount to murder

[*Baba Metzia* 59b]. A whole category of ethics was created to forestall the evil behavior

of *lashon hara* ("tale spreading") to protect reputations.

Joan Erikson writing in 1997 explains that originally the theory had only seven

stages, (as did Shakespeare's *Seven Stages of Man)*. While commenting to her husband

that Shakespeare had omitted a stage, she realized that their theory was also missing a

stage, which was hurriedly added to make eight.[78]

Interestingly, within Jewish tradition there are two different texts related to the

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[75] CCAR (1975) p. 625

[76] Spero M. H. (1981-82) quoting Soloveitchik. p. 41

[77] Spero, M.H. (1980) quoting Soloveitchik. p. 317

[78] Erikson, E. (1997) pp. 1-3.

"stages of man." The first originally appears in a collection of midrash called *Leviticus*

Rabbah, dating to some time shortly after the close of the Talmud. The version presented

here comes from a later collection, *Tanhuma Yelamdenu.*[79]

> for now, seven worlds follow one another in rapid succession.
> In the **first**, the child may be compared to a king: all greet it and long to catch a glimpse
> of it; they embrace and kiss it, it being but one year old.
> In the **second** stage, when about two years old, it may be compared to the unclean animal
> which wallows in the mire.
> In the **third** period, it resembles a kid of the goats, which capers hither and thither in the
> presence of its mother—an object of delight and joy to its parents, making glad the hearts
> of all who look upon it. [This period would include the age at which it begins to walk
> alone along the public way, and extends to the years of maturity at the age of 18. JE] And
> now,
> In the **fourth** stage, he may be likened to a spirited steed, running in the race and
> confiding in the strength of youth.
> But there comes
> the **fifth** stage, in which he becomes as the saddled ass, when, at the age of forty, he is
> bowed down by the weight of wife and children, having to travel backward and forward
> in order to bring home sustenance for the members of his household.
> And how much keener this contest becomes in
> the **sixth** period of life, when, like a whining hound, the bread-winner of the family in
> shamelessness races and tears about, snatching from one in order to give to another.
> And, lastly, there arrives
> the **seventh** stage of man's existence, in which, ape-like, his countenance changes, and
> childlike, he asketh for everything, eating and drinking and playing as a child: and there
> he sits, even his children and his household mocking at him, disregarding him and
> loathing him; and when he utters a word, he hears such expressions as 'Let him alone, for
> he is old and childish.' This is the period in which his sleep is so light, that the flutter of a
> bird's wing would rouse him from his slumber.[80]

The **first** stage is that of an infant, just as in Erikson's model. Not surprisingly,

since they both begin at birth. With Jewish parents treating their infants like kings, it

seems they will be in a good position to negotiate this Eriksonian stage of trust vs.

mistrust successfully. Erikson's **second** stage is autonomy vs. shame. The child in the

midrash is called a pig, an animal that Jews find disgusting. It is developing sufficient

autonomy to engage in behavior that results in a state of uncleanness the parents find

repulsive. Erikson's third, fourth, and fifth stages seem to be combined in the **third** stage

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[79] I have adjusted the alignment to try to improve readability.
[80] *Tanhuma Yelamdenu Pekudei 3.* Translation: Jewish Encyclopedia Online. "Seven
Stages of Man"

of the midrash. The child negotiates through the play age, school age and adolescence confronting Initiative vs. Guilt, Industry vs. Inferiority, and Ego Identity vs. Role Confusion. As "the object of delight to its parents" it can be assumed that the child is not immersed in activities about which it needs to feel guilt. Its "making hearts glad of all who look on it," leads one to suspect the child is developing enough industry to do tasks well. I find it extremely ironic that during adolescence when the "group" and peers take on inordinate importance, the child is still labeled a kid - a "herd animal." This stage lasts until marriage, which in the time the midrash was composed, most likely comes before Erikson would have the child leaving home. It should be also noted that rabbinic society is one of the few of its time when a significant number of boys would still be in school (or in school at all) during adolescence.

The **fourth** stage of the midrash fits nicely with Erikson's sixth stage and the beginning of his seventh. Here the young man is most productive and most "generative." In short order he will marry and produce children, start to earn a living and enter the most productive stage of his life. The **fifth** stage, as detailed by the midrash, corresponds to the second half of Erikson's seventh stage. At 40, the man is middle-aged. His work may no longer prove as challenging as it once was; his marriage and family life may seem less fulfilling. Life is good, but boring. The plodding donkey is an apt image. As middle age passes, and he enters the midrash's **sixth** stage, it is not as easy for him to provide for his family as it once was. He probably needs to support his children in setting up their own families and the image of him frantically trying to make ends meet seems apt.

However, this is the time when the earlier midrashim apply. If he has not begun thinking about "putting his affairs in order," now is the time to start. He is reaching the

end of his "generativity" by economic and biologic standards. Now is when he begins to

face Peck's body transcendence vs. body preoccupation. Will old age be a blessing or a

curse? According to the midrash's **seventh** stage, it is clearly the latter. Suffering from

some form of dementia, he seems to be an embarrassment to his family. However, the

midrash remains ambiguous as to whether he is happy. Some seniors with dementia I

have worked with, who would have been appalled to know in their younger years what

their older years would be like, seemed relatively happy in the moment, even if they had

severe memory loss. Is this Erikson's ninth stage? Or is that solely a product of modern

medical science? I do not believe this midrash takes us to the level of frailty described by

seniors in the ninth stage, but there is another text that does.

        The second text that mentions the "stages of man," is found in *Pirkei Avot*,

generally considered the final tractate of the *Mishnah*, compiled at the end of the second

century C.E.

> Rabbi Judah used to say: At five years old one begins the study of Torah; at 10, the study
> of ; and at 13, he is ready to obey the commandments. At 15, he begins the study of
> *Gemara*; at 18, he marries; at 20, he enters the chase; at 30, he is at full strength; at 40, he
> gains the power of understanding and at 50 he can begin to give advice to others. At 60,
> he enters old age; at 70, he turns gray; at 80, he becomes full of vigor and at 90, he is
> broken down. At 100, he is like a dead person who has passed away and faded from the
> world." [*Pirkei Avot* 5:24]

        At first glance, this does not seem to be closely related to Erikson's model except

so far as it demarcates life in stages. However, a 16th century mystical commentary on

this mishnah provides insight on our subject. The commentator, Moshe ibn Yehuda

Machri, published *Sefer Seder Hayom*, the "Order of the Day," which contains our text,

in 1598. The text was translated and summarized by Hillel Goelman[81] (1997) who writes:

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[81] All citations from this commentary comes from Goelman, Hillel. "Passages: The
Commentary of Moshe ibn Yehuda Machri on *Pirkei Avot*" in *A Heart of Wisdom*. Susan
Berrin ed. Jewish Lights. Woodstock, Vt. 1997

Sefer Seder Hayom attempts to unveil the mystical intentions of daily religious rituals and draw attention to the manifestation of God's presence in each moment and in every action done by each person … Just as each period of the day and each phase of the Jewish year is characterized by a specific manifestation of the Divine presence, each period of a person's life is also characterized by a specific way in which one becomes aware of the Divine presence. … The most dominant motif in ibn Machri's commentary is the sense of awe, wonder, and gratitude one should feel simply for being alive. It is incumbent upon us … to be constantly aware of the preciousness and impermanence of this life. [p. 30]

The first several stages interpret the *Mishnah* fairly literally, providing a solid basis for the child to function in the post-Temple academic world of the Rabbis. Marriages were most likely arranged and had little to do with Erikson's stage of Intimacy vs. Isolation. Goelman does not provide us with his translation, but rather, his own commentary on ibn Machri's commentary.

When a young man reaches 20, he begins to *lirdof*, "to chase," which some interpret as "chasing the study of the Torah" and others as "chasing the demands of an occupation" [and] … building a family. [p. 31]

Goelman leaves it unclear whether these alternative understandings are in the original or his own gloss. According to both models, reaching twenty seems to be the time to "build the family," and both view the next stage as the time to start generativity.

By age 30, the man enters the age of "full strength," when his physical strength is used to create a stable world consisting of material goods and shelter for his family and, as a product of his own sexual strength, children [p. 31]

However, while the generativity vs. self absorption stage continues for Erikson (and even in the *Lev. Rabbah/Tanhuma* Midrash), this commentary is different.

At the age of 40, a turning point is passed, and reflection and contemplation become a major focus … "the strengths of the spirit and intellect are just awakening." … he begins to ask "Is this all that life is about?" At this stage we become aware of our own mortality. Ibn Machri urges us to prepare for the final day of judgment. [p. 31-32]

Moshe ibn Machri is suggesting that people begin performing life reviews near the age of forty. Interestingly, modern research supports him:

The process of life review likely occurs, at least informally, in most people as they grow older … [A]ging adults attempt to integrate their various experiences to create an acceptable view of their life's worth. Colarusso proposes that life review may begin as early as the age of forty with the acceptance of the physical process of aging and the

realization that time is running out and certain ambitions will never be realized.[82]

Goelman continues:

> The enlightenment process continues in our 50's. The self-reflection that began in the previous decade now leads to two activities: one focused within one's self and the other directed towards others. An honest accounting of one's mistakes must include a sincere expression of teshuvah, or repentance … [This] is the first task to be done when we reach 50 years of age. The second task, one that is equally important, is using the wisdom and understanding one has gained for teaching others. [p. 32]

At each succeeding age bracket, the need for introspection and repentance becomes more critical. However, beginning at age 50, we acquire a new task, that of teaching others. We hear the echo of Erikson's definition of integrity:

> Integrity has two major attributes. The first is an acceptance of our life … and of the fact that our life is our own responsibility … The second … concerns our participation in the succession of generations. The previous stage involved care of future generations. This stage centers on one's comradeship with members of preceding generations.[83]

The commentary explicitly tells those reaching fifty to reach out and show some concern and care for the succeeding generations. Death was not uncommon in one's sixties. Personal losses strike home the need to prepare for our own demise.

Ibn Machri urges the reader to take the time now, while one still has what is left of one's health and strength to look within.

> At age 60, we realize that physical death can come at any time … only God knows the precise moment this life will end … although we have finished much of our life's work, we maintain sufficient strength to examine, fix, and improve what is left of our lives. [p. 33]

At 70, another Mishnaic "proverb" comes to mind. "Rabbi Tarfon said, the day is short, the work is great, the workers are lazy, the reward is great, and the Master of the house presses" [*Pirkei Avot* 2:20] This would seem to apply to anyone who has waited until 70 to begin preparing for the end. This is the proverbial "allotted years," all that one

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[82] LeFavi, R, G, and Wessel, M.H. "Life Review in Pastoral Counseling: Background and Efficacy for Use with the Terminally Ill." *Journal of Pastoral Care and Counseling* Vol. 57 No. 3 Fall 2003. p. 282
[83]   Capps, Donald (2002). P. 29

could reasonably expect. Moshe ibn Machri uses the analogy of preparing for Shabbat,

which has a time constraint all Jews would have understood. Shabbat, like death, comes,

no matter how prepared we are.

> This age carries a deeper sense of urgency … The enormous task of reflection and repentance seems disproportionate to the time remaining in one's life. He likens the situation to preparations for Shabbat: Those who spend time and spiritual effort readying themselves for Shabbat will have a Shabbat of rest and happiness. Beginning at age 70, we realize the imminent approach of Shabbat. What preparations have we made? What … are still unfinished? [p. 34]

In rabbinic circles, long life was seen as a reward for proper living. Reaching the

age of 80 and beyond signified that one had led an exemplary life. Presumably,

repentance was part of that exemplary life, and indeed contributed to one's longevity, so

the calls to repent are muted.

> Once one transcends the "normal" cycle to the level above, signified by the number 8, one has taken a meaningful step to spiritual fulfillment … One who lives to 80 … has done so by merit of intense preparation and deep spiritual work in the first 7 decades of life. [p. 34]

Eighty was still understood as within the limits of a lifetime, *The years of our life*

are seventy, or even by reason of strength eighty [Psalm 90:10]. Ninety is completely

beyond expectation. "Living to this age {90} is seen as … a testimony as to the

righteousness of the individual. The great mitzvah at his age is to use one's life as a basis

for teaching others how such a long life can be lived." [p. 35] And finally,

> In what way is a person 100 years old, "like a dead person?" The intellectual capacity of one who reaches 100 years of age is so diminished that it is not possible to recall with any accuracy the specific sins one has committed. … he is unable to consciously address his transgressions and repent … "The person is so old and faded from this world that he could not sin even if he wanted to. What kind of teshuvah can be done by someone that cannot even sin?" [p. 35-6]

In closing, Goelman notes that ibn Machri

> suggests another teaching of the *Mishnah*: that a person should seek a most "suitable" friend or "chaver, who will teach and accompany him through the stages of his life. … ibn Machri urges us to do our most important spiritual work with others, and even suggests that it cannot be done otherwise. [p. 37]

Therapeutic Life Review is best practiced through one-on-one conversations.[84]

Relationship is part of the process. One person "witnesses" the personal story of another,

and becomes a "repository" of that person's life and hence a means of that person's

immortality. But there is not only a need for the Life Review to be heard, there is a need

for it to be spoken. It is as Solevetchik writes about confession:

> To do this necessarily entails expressing the thought of repentance in words and working it out in logical terms. Pure thought on its own, no matter how exact and penetrating, is simply not grasped until it is formed into words. We know many truths about ourselves that we dare not express in public, and even avoid saying them to ourselves. It is not easy to give expression to our thoughts - all the more so when these thoughts are unflattering … Confession is … rather, part and parcel of repentance, the climactic finale of a drawn-out, exhausting process … confession is not valid unless it bursts forth from within the fiery depths of the furnace of repentance … A basic principle of the laws of property is that "matters [that are only] within the heart are of no significance" [*Kiddushin* 49b] Speech, the verbalizing of confession, endows the thought of repentance with reality.[85]

Close to the end of the article, Goelman departs from the text to talk about

meaning, and that the search for meaning was an important part of this commentary. He

> quotes Jung's observation that neurotic pain "must be understood ultimately as the suffering of a soul that has not discovered its meaning." It is in this discovery, ibn Machri would tell Jung, that one addresses the challenges of living, aging, and dying. And we use the discovery of that meaning to bring us closer to the Source of all Creation. [p. 36]

The search for meaning is a critical part of the drive for integrity and a critical

drive in Judaism's search for holiness.

> We are meaning seeking animals. We want to know who we are, what we can know, what we can hope for, why we were born. We seek meaning in the work we pursue, the relationships we forge, the homes we build and the communities to which we belong. When we form congregations … we are really seeking meaning. Wherever and however we seek meaning in life, whether in the religious or secular world, the answers to the questions, "Who am I?" and "Why am I?" define a theology - a special theology that is our own.[86]

Erikson and Tornstam both see the redefinition of our concern from the personal

to the universal as part of this search. Judaism has long made the search for universal

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[84] Burnside, Irene and Haight, B. K. (1992) p.857.
[85] Peli, Pinchas. *Soloveitchik on Repentance*. Paulist Press. NY 1984. Pp 231-232.
[86] Ochs, Carol (2001) p. 2.

justice a core part of its ethic. To quote Rabbi Samuel Karf:

> The most fulfilled moments of our own lives. They have not been moments when we were preoccupied with meeting out needs, but times when we were gripped by a cause that took us out of ourselves. We felt needed by another person and we felt we were serving a purpose beyond the confines of our ego. The truth is we cannot be happy if we do not live for something higher than our own happiness. … Happiness is not something to aim at, pursue and find. It is at best, the by-product of a purposeful, meaningful life. The core commandment of the Torah is not "You shall be happy" - but "You shall be holy" - You shall lead a life of significance The hallmark of these 24 hours is a fast … to place some restrictions on the impulse to immediate self-gratification; to reaffirm that we are here to serve a purpose beyond ourselves - that there is more to life than life itself.[87]

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[87] Karf, Samuel E. (1985) Pp. 120-21

Chapter 4:   <u>**METHODOLOGY**</u>

A. Introduction.

I work as a chaplain at Lutheran Medical Center in Brooklyn. Lutheran Medical Center, a 476-bed hospital, is a major teaching affiliate of the State University of New York Health Science Center at Brooklyn, and is a clinical campus for primary care education. It is a Level 1 Trauma Center, and brings a wide range of health care services to the ethnically and economically diverse populations of southwest Brooklyn. My department also has responsibilities working at the Affiliated Lutheran Augustana Center, a 240-bed nursing home and rehabilitation center. This study was conducted within the purview of the Pastoral Care Department of Lutheran Medical Center with the assistance of the Recreational Therapy Department of Lutheran Augustana Center.

I had determined that I wanted to do a project with this population to help elders resolve spiritual issues related to the approach of the end of their lives. In discussing alternatives with the Chaplaincy and Therapeutic Recreation staffs, the idea of life review was chosen. The technique is based on Erikson's eight stages of development, and in particular the eighth and last stage which is the struggle between integrity and despair, and is discussed in greater detail in the psychological section of this project.

I believe that spiritual integrity must deal with Tillich's three existential anxieties: the anxiety of death, the anxiety of meaninglessness, and the anxiety of condemnation (guilt). While present throughout one's life, these anxieties become critical as one feels the approach of the end of one's life. They force one to ask the questions: Why do I exist? Have I made a difference? How will I be remembered? Does my life have meaning? Am I/Was I a **good** person?

B. Study

This study proposes to assess the effect of life review techniques on the spiritual well-being of a sample of elderly residents. This study follows the methodology suggested by Barbara Haight[88] who has published numerous studies on the effects of life review and has written on its value in pastoral counseling. In distinguishing between life review and reminiscing, Black and Haight emphasized that

> Life review is not a random sharing of pleasurable past events, but rather a structured process containing a component of self-evaluation … Instead of reminiscence occurring naturally, … life review should cover the entire life span, analyze, evaluate, and synthesize life's events, and be conducted individually with one other therapeutic person acting as a guide.[89]

This suggestion guided my methodology. In particular, it helped decide to work with each participant individually instead of meeting. Individual meetings laid to rest concerns over how well different participants at different grades of cognitive abilities would mesh together in a group, as well as interpersonal issues that made some of the selected participants reluctant to work together.

Some of Haight's studies seemed quite adaptable to my situation. In one, she studied home bound elderly subjects, which seem to auger well for my study of nursing-home bound elderly subjects. In it she describes her overall methodology as follows:

> The experimental design of pretest/posttest was used … The life review process consisted of a series of six 1-hr visits purposefully structured to guide the older person through his or her memories by attentive listening. This process was accomplished through the use of the Life Review and Experience Form [included in Appendix III as Haight's LREF]"[90]

I found this methodology to be well within the scope of my project and clear enough to use without formal training.

With regard to the role of the interview/counselor, Haight writes:

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[88]　Haight, Barbara K. (1989) "Life Review: a Method for Pastoral Counseling"
[89]　Black and Haight (1992) p. 9

> The role of the counselor … [is] to listen empathically and allow the reviewer to explore her feelings without a negative judgment. … Open acceptance …by the counselor, along with warm positive regard toward the review is an important component of the process.[91]

She turns to Carl Rodgers' client-centered approach to counseling for guidance:

> Unconditional positive regard is essential. This quality involves acceptance and caring for the reviewer as a separate person with permission to have his own feelings and find his own meaning in them. Another important quality is empathic understanding … the non-evaluative and acceptant quality of an empathic climate enables persons to take a prizing caring attitude toward themselves. … makes it possible for a person to listen more accurately to themselves …opens them to new facets of experience which become of a more accurately based self concept. [92]

I find this approach fits very well into my role as a pastoral counselor and chaplain, not only with regard to this project, but in general. It is one that I am comfortable using.

Many of the residents of the nursing home have cognitive impairments - often severe. Eight residents were chosen, with the help of the Director of Recreational Therapy, who were thought to be sound enough of mind and body to have both the cognitive skills required and the stamina for the necessary interviews. About 20 residents were initially identified. Residents were invited to participate, until the quota of eight had agreed. The refusal rate was over 50%, introducing an unknown source of bias.

At each meeting in between, the participant is encouraged to tell autobiographical stories from the period of his/her life that is the subject of the meeting. A series of questions guides the researcher. The questions come from a variety of sources. Haight's LREF questions are part of each meeting's list. The list of adolescent questions is supplemented by questions from Donald Patterson's book, <u>Writing Your Spiritual Autobiography</u>[93]; and the "look back" or summary meetings are supplemented with

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[90] Haight (1988) p. 42
[91] Haight (1989) p. 26
[92] Ibid.. p. 19-20
[93] Patterson, Richard. (2002)

questions from Patterson as well as from Legacy,[94] by Linda Spence, and Birran and

Cochran's, Telling the Stories of Life through Guided Autobiography Groups[95]. Haight is

clear that "It is not necessary to ask all questions presented in LREF, they act only as

guidelines. It is necessary, however to cover all life's stages in the life review process." [96]

The clear message she sends is "Be flexible."

At the beginning and end of the project, a spiritual assessment is administered.

Also at the last meeting a series of retrospective questions are asked to further assess the

impact the study has had on the residents.

C. Schedule.

Each participant met with the researcher 7-9 times over five weeks.   The

meetings were recorded. The schedule of meetings follows:

Meeting:	Intended Topic(s)	Date
I	Introduction, Demographic Questions Administration of Spiritual Assessment.	Jan. 11-12
II	Childhood	Jan. 14-15
III	Adolescence	Jan. 18-19
IV	Older Teen Agerhood/Family of Origin	Jan. 21-22
V	Young Adulthood	Jan. 25-26
VI	Middle Adulthood/Present	Feb. 1 - 2
VII	Present/Look Back	Feb. 4 - 5
VIII	Summary/Look Back 2	Feb. 8 - 9
IX	Goodbyes; Re-Assessment	Feb 15-17

On Wed. Feb. 17, all the group members met and the assessment questionnaires were

filled out.   The number and length of private life review sessions (45-60 minutes) are

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[94] Spence, Linda (1997)
[95] Birren, James E. and Kathryn N. Cochran. (2001)
[96] Haight (1989) p. 20

consistent with other studies, including Haight (1998, 1989) - eight sessions; Haight and

Dias[97] (1992) - eight sessions; Hanaoka et al (2004[98] and 2003[99]) - six and eight sessions;

and Youssef[100] (1990) - six sessions.

D. Spiritual Assessment Tools

There is a growing body of literature regarding the need to address the spiritual

needs of human beings wherever they reside. This study is predicated on the hypothesis

that the intervention of "life review" will improve the psycho-spiritual lives of the oldest

residents of the Augustana Residence. Erik Erikson suggests that the final struggle, for

those lucky enough to reach the eighth stage of life, is for integrity. This struggle is to

make meaning from our history and our choices.

It has long been observed that the elderly often spend their time reminiscing about

their past. It has been theorized that the purpose of this reminiscing is to help re-evaluate

and recontextualize our life story. By offering a structured means to perform such

reminiscing, we allow residents to reap the benefits that come along with this.

Joan Erikson, revising her husband's final book, both writing in their 90's,

proposed a ninth stage whose purpose draws from Tornstam's[101] conception of

"gerotranscendence."   Successfully negotiating this stage of development leads to a

focus away from the self, an interest in the world at large and for future generations. This

leads to a preparation for death, presumably with a lessened fear of the loss of physical

self.

Following the increased emphasis on meeting spiritual needs mentioned above,

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[97] Haight BK, Dias JK. (1992)
[98] Hanaoka, H and H. Okamura. (2004)
[99] Referenced in Hanaoka, H et al. 2004.
[100]   Youssef FA. (1990)

various measures have been proposed to assess them. In a review of the literature, I have

determined that the measures are predicated on very different understandings of

spirituality. I believe they break down into the following categories:

    1. One's relationship to God or a higher power or spirit
    2. Prayer/meditation or other communication with that higher power

    3. Connectedness of nature, life, humanity
    4. Peace/serenity
    5. Gratefulness
    6. Creating a better world

    7. Efficacy - Knowing oneself
    8. Forgiveness
    10. Acceptance
    11. Meaning/purpose
    12. Inner strength
    13. Balance

    14. Hope/Future Orientation
    15. Awe

It seems to me that items 8, 9 10, 11, 12, and 13 result from a successful struggle for

integrity and items 3, 4, 5, 6, and 7 are tied more with gerotranscendence. Items 14 and

15 could be an outcome of either. One's relationship with one's higher power is a

complex understanding changing throughout one's life and resolving various conflicts

and disappointments would may or may not have an effect on this.

      From my review of the available Spiritual Assessment scales in the literature, I

have pulled together questions that I feel better captures the multiple definitions of

spirituality. In the following list of the questions used, I have included the source of the

question and which type of spirituality it seems to measure. The source of the question is

in parentheses and the type of spirituality measured is in square brackets. I have included

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[101] Erikson (1992) pp. 123-126.

four questions from the Death Anxiety Scale[102], which should decline if the theory is

correct.

Scales Investigated

[SWBS] Spiritual Well-Being Scale[103]
[SIWB] Spiritual Index of Well Being[104]
[DSES] Daily Spiritual Experience Scale[105]
[CSA] Crestwood Spiritual Assessment[106].
[VSS] Virtebo Serenity Scale[107]
[LLS] The Love of Life Scale[108]
[Atchely] Atchely's Spiritual Assessment Guide[109]

The actual Spiritual Assessment Tool (printed in large font) appears in an

Appendix IV. Here I present the statements I have chosen from the various spiritual

assessment tools in the literature and the scale it comes from in parentheses. In brackets I

have given the understanding of spirituality I believe this statement measures. My

rationale in terms of ordering the question was to try not to have questions measuring the

same understanding of spirituality too close to one another and to try to spread the

negatively worded questions throughout the questionnaire.

Spiritual Assessment Questions for Augustana Project

I have a sense of balance/fulfillment in my life. (CSA) [balance]

Even when I feel discouraged, I trust that life is good. (CSA) [future/hope]

I feel a sense of well-being about the direction my life is headed in. (SWBS)

[future/hope]

I feel unsettled about my future. (SWBS) [future/hope]

I have a lack of purpose in my life.   (SIWB) [meaning]

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102 Templer, D. I. (1969).
103 Paloutzian, RF and Ellison, CW (1982)
104 Daaleman, Timothy P. and Bruce B. Frey. (2004)
105 Underwood, L.G.,& Teresi, J.A. (2002).
106 Lukoff, David. (2009)
107 Kreitzer MJ, Gross CR, Waleekhachonloet OA, Reilly-Spong M, Byrd M.(2009)
108 Abdel-Khalek, Ahmed M. (2007)
109 Atchley, Robert C. (2009)

In this world, I don't know where I fit in.   (SIWB) [meaning]

I feel very fulfilled and satisfied with life. (SWBS) [meaning]

I realize that my existence in this life has great meaning. (LLS) [meaning]

I feel motivated to help relieve pain and suffering in the world. (Atchley) [connectedness]

I have an inner strength that I can rely on. (CSA) [strength]

I am able to forgive people who have done me wrong.   (CSA) [forgiveness]

For me, forgiving myself and others is important. (Atchley) [forgiveness]

I feel thankful for my blessings. (DSES) [gratitude]

Independent of events, I can find an inner peace. (VSS) [peace]

I am accepting of events in my life that I do not have the power to change. (VSS) [acceptance]

I believe that a Higher Power loves me and cares about me. (SWBS) [God]

I feel a sacred presence. (Atchley) [God]

There is a part of me that seems eternal. (Atchley)

I sometimes find myself in awe of the world around me and [believe that there is] {feel connected to} some force out there larger than myself (VSS) awe/nature/connection]

I feel that I am part of something much greater than my personal self. (Atchley) [connection]

I experience a connection to all life. (DSES) (Atchley) [connection]

I feel little connection to other people. (CSA) [connection]

I don't know who I am, where I came from, or where I'm going. (SWBS)

From the Death Anxiety Scale:

I am not at all afraid to die.

The thought of death never bothers me.

I am often distressed by the way time flies so very rapidly.

I often think about how short life really is.

I feel the future holds nothing for me to fear.

Given that the change in the scores between initial interview and final interview is more important that the actual score, in this project, having more options allows smaller degrees of change to be apparent. When given a middle option, respondents frequently

avoid the psychic cost of choosing and load up in the middle. Therefore, a six item scale

with no middle option was used.

For each of the following statements circle the choice that best indicates the extent of
your agreement or disagreement as it describes your personal experience:

SA = Strongly Agree   MA = Moderately Agree   A = Agree (weakly)
D = Disagree(weakly)   MD = Moderately Disagree   SD = Strongly Disagree

Except for the final meeting, all sessions took place in the resident's room or an

unoccupied communal space. The sessions were recorded for possible review by

researcher or resident, with copies to be made available to the resident upon request.

For the final evaluation, all residents gathered together in a conference room and filled

out the Spiritual Assessment questionnaires simultaneously. Any resident who required

further assistance was assisted one-on-one by the researcher.

One of the planned strengths of my spirituality assessment tool is that it is

designed to be a broad measure of spirituality. If a person has a highly developed

spiritual perspective that reaches across many different understandings of spirituality, this

tool is designed to pick that up. It is designed to find spirituality defined as broadly as

possible. This is however a weakness as well. Most people do not look at spirituality in a

broad way. They have some way that works for them and may or may not be interested in

exploring other spiritual modalities. Since my spiritual assessment tool accommodates

many understandings of spirituality, almost any understanding of spirituality will produce

a "hit." Yet many individuals with working understandings of spirituality will score on

their particular type and not on others, producing a low score overall. Therefore, I believe

the tool I developed is still useful but not as a measure of the amount of spirituality, but

rather, as a measure of breadth of spiritual understanding. The higher the score the more

open to different understandings of spirituality one is.

This led me to choose to use a second measure of spiritual well-being. Since the one I had measured breadth, I wanted a scale that measured depth. The drawback of such a scale was that it is limited to a certain type of spirituality. If the individual was very spiritual, but had a different understanding of spirituality, it would register as little or none at all. However, it seemed reasonable to assume that since my main goal was related to Eriksonian integrity, a measure that captured that would be best.

There is such a measure. It is called the "Spiritual Well-Being Scale" (SWBS) and measures what it calls "existential well-being."

> The SWBS [Paloutzian & Ellison, 1983] is a 20-item instrument designed to measure spiritual well-being, defined both by the strength of one's relationship with God (religious well-being [RWB]) and a sense of satisfaction and purpose in life (existential well-being [EWB]). Participants rated each item on a 6-point Likert scale, ranging from "strongly agree" to "strongly disagree." The total SWBS score is equal to the sum of the RWB and EWB scores. The maximum RWB and EWB scores are both 60 … the SWBS has been used in several hundred studies with adults and shows high internal consistency, validity, and test-retest reliability[110]

Of these two scales, only the EWB scale was used for this study The hypothesis of the study is that life review, the guided introspective process, will affect how one reprocesses memories resulting in a changed outlook of one's past and ones self. This is intimately tied to the "sense of satisfaction and purpose in life" which is measured by EWB. Any change in one's "relationship with God (religious well-being [RWB])" is assumed to be secondary, if present at all.

There remained one more concern that I wanted to address. Brown et al[111], suggested that individuals in Erikson's ninth stage, may have a different set of concerns and a different understanding of spirituality. Their research suggested a way to measure this new set of spiritual concerns. By using any standard measure of spirituality, I risked

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[110] Rubin, Daniel, Melissa Dodd, Neelam Desai, Bradley Pollock, & John Graham-Pole. (2009)

[111] Brown, Cynthia and Michael J. Lowis. (2003)

missing this special type that exists exclusively among the older elderly. My population

was mostly 85+ (the minimum age was 75). My own scale was based on questions drawn

from standard spiritual measures. I thought it would also be vulnerable, therefore, I

included Brown's ninth stage scale as well.

One caveat. A major reason for using the two other scales was that the scale I

developed did not have time to be pretested. Even though the question were drawn from

previously used tests, I felt more comfortable relying on a number of different tests.

Lastly, the participants were asked to critique their experience in the study - whether they

found sessions useful and did they feel it made a difference in their lives. There may be

value to the process even if the spiritual assessment tests themselves are inconclusive.

Chapter 5:   **Process**

A. The Life Review

The residents were approached to participate in the study by the head of

Therapeutic Recreation. She reported back to me that surprisingly quite a few people she

had been sure would participate, opted not to. There was no reason given. As a result, the

final group of eight, included residents with a slightly lower level of mental functioning,

but this, I was assured, should not be a problem. This assurance turned out to be

optimistic.

The project was delayed due to bureaucratic problems, including developing a

legal release which all the participants signed and is included in Appendix I.

I initially met each resident one on one to introduce myself, the study, and

administered the spiritual assessment. Initially, I had been thinking of including a group

meeting to share stories. At those initial meetings I discovered great resistance to meeting

as a group. I also discovered that these seniors were not shy about sharing with me about

any imposition they felt the study placed on their already existing schedule.

After administering the original spiritual assessment, it became clear that many of

the residents scored quite high on my assessment tool, making me wonder if there would

be room for improvement. I also questioned whether this was an accurate measure of how

they felt. Were they just being polite and giving me the answers they thought I wanted to

hear? There was no way to verify this, but at that point I decided to bring in some other

measures.

I decided that before beginning the life review I would include another indicator

and at the beginning of the second meeting for each person, administered the Existential

Well Being Component of the SWB Scale developed by Ellison and Paloutzian.[112] In

addition, I had uncovered in my research a set of questions, by Brown et al,[113] that were

specifically designed for adults in Erikson's eighth and ninth stages. These were

administered at the beginning the second session as well. Both sets of questions appear in

Appendix IV.

The interviews went fairly smoothly. There were scheduled meetings with each of

the eight participants twice a week. Usually the participants were fairly good natured

about swapping appointments when one could not make it or felt under the weather.

There was definitely a process of learning to trust. As the interviews went on, people

opened up and more of the stories were about things they had not thought about or talked

about in a long time.

Problems

It soon became apparent that the assurances I had been given about the mental

functioning of the population had been overly optimistic. I decided to make do as best I

could, given the participants' limitations. However, it meant listening to the same stories

over and over again, as if they were being told for the first time.

For example. One woman would bring everything back to her controlling mother,

who wouldn't allow her to marry at 15, but at that time told her she could marry at 17.

How she and her husband got married when she was 17 and he was 26, then how he got a

job, which moved away. He went with the job and is now in Boston. She told him just

send her a message from time to time that he was all right. I was never able to pin her

down as to how long they were married before he had to move. She also told two

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[112] Paloutzian, R.F. and Ellison, C.W. See Methodology section for a discussion of this
measure and the Appendix III for a sample.

different versions of her having a daughter.

Here is verbatim from one of our last encounters.

Me: Do you have any new stories for me, K?
K: It don't matter, I can't go out?
Me: What do you mean?
K: I can't go no place. Mommy had 11 of us. My girlfriends come and say, K come on out. I say I can't; mommy won't let me. I can't go no place. I got married. J's in Massachusetts, .that's far away now, I'm in the aged home. That's where I belong.
Me: What happened in between?
K: I couldn't go no place. Mommy wouldn't let.
Me: That was when you were a kid. What about when you grew up?
I got married at 17. J got a job with Tarbrush co. And then I was at home again. With this home.
Me: And then you had a little girl?
K: The first time - and then she got big. Then … no she was born but … the baby couldn't live. It was born - that was it. The midwife said it had to go to the undertaker. There can't be a funeral - It's a baby. So I'm quiet. J's in Mass. And I'm here.
{I show her a picture of her great grandchildren.}
Me: How did you get these great grandchildren?
K: From the boys
Me: You had sons?
K: No the boys - my brothers. Mama had 11 children. 5 boys and 6 girls. Two became nuns.
{I show her a note from her granddaughter Laura.}
Me: Didn't Laura sent these flowers?
K: Yes my granddaughter.
Me: If Laura was your granddaughter, then Laura's mother was your daughter. Who was Laura's mother?
K: Pause. I'm all mixed up. Pause. I can't remember. I'm mixed up excuse me.

 Every visit had an interchange like the above. It was never clear to me if she did have a

child or whether it was still born. Whether her daughter grew up and had children, or

whether it was her best friends daughter with her in the picture. Does the reference to

"the first one" mean she had one die and one survive. Where the pictures of her great

grand nieces and nephews and Laura a niece that affectionately calls her grandmother.

Only occasionally would she piece the mysterious veil about her married life, except the

"J called down from street, I was in the window. He said that the company was moving to

Boston …" Yet stories about her childhood were as clear as a bell.

The Final Meeting

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[113] Brown, et al (2003)

The final meeting took place on Wed. February 17, 2010. It was the first Wednesday meeting and only time the participants got to meet each other. One participant had dropped out of the study. The other seven met in an activity room on one of the floors where the residents live (the eight participants lived on three floors).

A week prior to the final group meeting, I let each participant know when it was scheduled and that we would be meeting as a group. I also asked what assistance they would require. Outside of transportation to the meeting and being returned back to their floors, no further assistance was required. In the final one-on-one meeting, I reminded them of the group meeting and explained that we would be re-taking the tests we took in the beginning.

At the meeting, each participant received a folder, with their name on it, with all the tests they needed to complete inside. In addition to the three tests they took initially, a fourth test was given for them to use retrospectively, and evaluate their experience. The order of the tests were the retrospective test, followed by Brown's Stage 8 & 9 questions[114], followed by my initial spiritual assessment questionnaire, followed by the Existential Well Being Component of the SWB scale.

Before we began, I asked one woman to tell a story she had told me repeatedly, which she and the group enjoyed. Which went like this:

When I was a little girl my mother used to always set my hair in curlers. One day I said that curls were for babies, that I wanted to get my hair cut. She said OK and took me to my father's barber, Joe the barber. When my father came home from work that evening, I was talking with my girlfriends on the steps. He walked right by with without recognizing me.

She had told it so well, I asked her to tell the story of her wedding.

At my first wedding, it was terrible weather. It was raining something fierce. Less than an hour before the reception, there were no guests. The band leader turned to my father and asked if he wanted to cancel the reception. My father pointed to me and said. Go ask her - it's her wedding. We persisted and in the end, everyone came.

I had mentioned at each of the final one-on-ones that I may ask them for a story, but when I asked for someone to go next, I had no volunteers, so I continued on to the questionnaires.

At first, I stood at the front of the room and tried to lead the participants through the process. I had the assistance of the head of Pastoral Care, whom I sat next to the oldest participant (98) with the greatest mental disability. I quickly noticed that some people were moving ahead at their own faster pace, while others did not seem to be following or making progress. I gave the group permission to work as fast as they would like on their own. I spent most of my time with the next most mentally challenged participant, but also walked around assisting people. With encouragement, everyone completed the forms and I thanked them, told them that I would be still available to meet and talk with them, but no longer on a schedule. After we broke up, I checked the forms and spent time with those who had missed filling in sections.

A synopsis of the analysis I performed will be presented in the results section.

B. <u>Participants</u>

Eight participants were selected. One dropped out of the study towards the end and will be part of the group statistics but not part of the analysis. The eight consisted of 2 men and six women. Five were born in the US (NY specifically) and three from abroad;

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[114] also referred to as Brown's Gerotranscendency Scale.

one each from Canada, British Guyana (now just Guyana), Ireland. Seven were

Caucasian and one was black. All had English as their native language, although two

spoke other languages, as well, at home. The youngest was 75 and the oldest was 98. All

had spent the majority of their lives in NYC, with most spending it in Brooklyn. Only

three had ever married, all women, two of whose husbands were alive but living in other

facilities.

All believed in God and were comfortable with the term. Six were

Catholics, one Anglican, and one Baptist. All but one remained in the

religion of her/his birth and the exception switched to her father's religion as

an adult. All had careers, except for two women, one who was disabled, and

the other who married young and was a housewife, who was the only one to

have a child.　　　All but one were wheelchair bound, and the exception

only recently (within the year), moved from wheelchair to walker. Four

definitely had some type of memory impairment. They all seemed in

reasonably good health

Chapter 6:   <u>**RESULTS**</u>

There are four sets of data that I have at my disposal for analysis. My original spirituality assessment tool (OSAT), the Existential Well-Being component of the Spiritual Well-Being Scale (EWB), the Brown ninth stage Gerotranscendency Scale (Gero), and the retrospective questions that rate how well the study performed along certain variables.

Because of unanswered questions, it made more sense to look at averages than total scores, as in some other analyses.

% Change for Each Measure Post-Test Over Pre-Test

	OSAT	Gero	SWBS
elder 1	1.00%	21.74%	-27.59%
elder 2	7.55%	10.05%	7.84%
elder 3	-18.88%	18.33%	-18.00%
elder 4	27.38%	22.03%	41.18%
elder 5	-6.01%	n/a	20.00%
elder 6	13.33%	17.24%	20.00%
elder 7	10.01%	n/a	n/a

The figures presented above show the percentage change of the average score across all the questions of the test. To arrive at the average, first those questions phrased in the negative were reordered, and the coding reversed, by changing a six to a one, a five to a two, a four to a three, a three to a four, a two to a five and a one to a six. Then the sum of all the questions answered was divided by the number of questions answered. The average score was calculated from the answers each elder provided from the pre-test, at the beginning of the project (meeting 1). The average score was calculated from the post-test (taken at the final group meeting). The percentage change of the average scores for each elder was calculated by the following equation. $(AVG_{post} - AVG_{pre})/AVG_{post} * 100$).

Unfortunately, one elder decided not to continue with the study mid-way through.

By the time it came to wrap up the study, a day or two had been lost unexpectedly, due to weather and special nursing-home wide events that were not on the schedule. Therefore the final meeting was arranged to accommodate concluding the study on time. This introduced a major unplanned difference between the pre-test and post-test. In the pre-test, I sat with each person and asked them the questions and recorded the answers for them. The post-test questionnaire was filled out by the respondent, without my help, at the final group meeting. This probably allowed for misinterpretations of some of the questions to occur. I am not sure what effect this had on the numbers.

A caveat about the SWBS. This test consists of 20 questions, 10 of which were part of the existential scale (EWB). It is designed so half the questions are phrased in the negative and half in the positive. There were many times, during the administration of the pre-test, that the elder assumed the question was in the positive and I needed to correct him or her or transpose the answer. For example, to the statement, "Life doesn't have much meaning," the elder might say to me, "It does have meaning - I strongly agree."   I would then explain that "strongly agree" meant the life did not have meaning. Sometimes this required repeated back and forth. One question in particular caused problems for the elders. "I don't know who I am, where I came from, or where I'm going."   Furthermore, these questions had the greatest difference between pre- and post-test results, suggesting that without me to correct the answer, the elder put down his/her understanding, which then reflected a larger movement between pre- and post-test.

But what can we deduce if we assume the test numbers are valid? According the SWBS, four of the six increased their existential spirituality over the course of the

life review. It is impossible to say that it was due to the life review, just that it occurred over that same period of time. It makes sense to me that Elder4 showed the greatest change over the course of the life review period. She was always cooperative, alert, told meaningful stories that were not rehearsed, and seem to grapple with some of the issues that came up. It also makes sense that Elder1 found herself with less existential spiritual well-being. In her case, issues came up towards the end of the process and did not have time to be resolved. Both were among the more cognizant members of the group.

What makes less sense is the negative score obtained by Elder3. Her initial responses, for whatever reason, to the questions given on the pre-test, were all the highest possible, except for one - which was the second highest. This does not seem like a realistic initial assessment, so of course it fell.

From a pastoral point of view, I would make sure that I checked in with Elder1, and ask her to discuss her experience of the life review with me. (Although her self-assessment was extremely positive.) To have a life review negatively impact your spirituality may not be a bad thing. If you are seriously wrestling with your issues, you look at your past and the answers you get to the existential questions may not be so good.

The life review is supposed to spark a re-evaluation. Five or six weeks is not a lot of time for the process to take its course. Butler, in his original paper, mentions that results of a life review are not always positive. If Elders 1 and 3 are really going through a difficult patch, it validates the importance of spiritual assessment. Before this test, it was not obvious. It also pays to look at the actual level in making this determination. Elder3's EWB is among the highest in the group. It lends confirmation to my assessment that her initial astronomical assessment was probably unrealistic and the drop shows a

more realistic attitude to many of the questions. Elder1, on the other hand, has the lowest

EWB score in the group and it would be important to check in and see how she is doing.

Is she wrestling with existential issues? That would be my guess reading the numbers.

The new scale OSAT developed for this study can be used to look at what types

of issues a senior is having. I have printed out the change table. It is possible to quickly

see where an elder has changed her/his evaluation between the starting and ending dates

of the study. Right now, what is most apparent is that the OSAT scale still needs work.

For example, looking at the responses to question seven, it seems odd that five of our

seven seniors had a significant negative change in their response to the same question. As

it turns out, this is one of the questions phrased in the negative that I believe the elders

did not understand. The question read, "I am unable to forgive people who have done me

wrong."   During the initial assessment, they often said, "I can forgive people. I agree."

However, agreeing to a negatively phrased question would be rescored as the first step of

analysis. When I am working with them one-on-one to complete the questionnaire, as I

did for the pre-test, I can explain the true meaning of the question. However, when they

are filling it out on their own in the group setting, as they did for the post-test, they may

not remember or notice the negative phrasing. For Elder2 there is some corroborating

evidence. There is a second, positively worded question, number 24, "Forgiving myself

and others is important." No one else seemed to misinterpret this question - the changes

are all reasonable - one step or no change. However, Elder2 goes from the top to the

bottom. Along with the suspect information about question seven, this could suggest that

Elder2 is feeling guilty about something. After ascertaining that the information from the

scale is indeed correct, then it would be possible to explore a pastoral intervention. It is,

however, a scale still in development, so I would not place an inordinate amount of faith

in it as of yet.

OSAT Difference Table

Diff	Elder1	Elder2	Elder3	Elder4	Elder5	Elder6	Elder7	Avg	
1		0	0	2		4	0	1.20	eternal
1a	-1	1	-5	3	0	1	0	-0.14	afterlife
2	-1	0	0	4	4	1	-1	1.00	fulfillment
3	-1	1	0	-1	1	4	2	0.86	unsettled
4	0	1	0	3	2	-5	1	0.29	life good
5	0	3	-4	4	0	2	0	0.71	short life
6	-1	1	0	1	-3	4	-3	-0.14	connection
7	-3	-3	-3	-4	-2	1	0	-2.00	forgive
8	0	0	0	1	2	1	0	0.57	inner strength
9	0	0	0	4	-1	1	-5	-0.14	direction good
10	1	0	0	-1	-3	0	-3	-0.86	time flies
11	1	-1	0	1	0	1	-1	0.14	Higher Power
12	-1	1	0	4	1	1	0	0.86	satisfied
13	0	4	0	4	1	1	0	1.43	future no fear
14	0	0	0	2	1	1	0	0.57	blessings
15	2	3	0	1	0	0	0	0.86	sacred presence
16	0	-3	-4	2	-3	0	-3	-1.57	lack of purpose
17	-1	-2	-1	1	1	-2	-3	-1.00	awe and connection
18	-1	1	1	0	1	0	0	0.29	afraid to die
19	0	1	0	2	0	1	1	0.71	part of something
20	0	0	-5	0	1	1	0	-0.43	accepting
21	0	0	0	0	1	1	1	0.43	death doesn't bother
22	0	3	0	1	1	1	0	0.86	connection
23	0	-2	-4	1	-2	1	-1	-1.00	stop suffering
24	0	5	0	0	1	1	1	1.14	forgive myself
25	0			1	1	0	1	-0.50	meaning in life
26	-1	-2	0	1	0	-1	-1	-0.57	inner peace
Total	-6	11	-31	38	4	17	-16		

        In the Methodology section, I suggested that grouping the questions about death

together might produce a death anxiety proxy, which should be affected by life review

and go down. This did not occur. The results are inconsistent with any effect by life

review. Some increase and some decrease.

        24   19   28   17   22   23   25   DEATH1

24   27   25   24   22   27   23   DEATH2

The changes in the third scale, Brown's Gerotranscendence Scale, were uniformly positive. Unfortunately, two of the elders did not take both sides of the instrument, so we only have five data points, but they are all in agreement. This may be evidence that life review can help older elders make the transition suggested by Tornstam, to a shift in meta-perspective from a materialistic and rational view to a more cosmic and transcendent one. If this is truly the case, even the short-term life review process, such as conducted in this project, could help the oldest old negotiate the ninth and final stage of their lives, resulting in gerotranscendence.

From the point of view of the group, the sessions were a success. Using the same scale as the other scales, six answers from Strongly Agree to Strongly Disagree, they were asked to what extent they agreed with the following statement. The statement was phrased: "The Life review sessions were …" or "The Life Review sessions gave me …" or "The Life Review session helped me …" Only positively worded statements were offered.

The first thing that stands out is that Elder 7 is much lower than everyone else in almost every category. He may be a special case in that he missed the most sessions, suffers from some early stage dementia, and was perturbed at one point by some noise coming from outside the door. He was the only one who seemed to be bothered by it.

"Look Back" Responses

	Elder1	Elder2	Elder3	Elder4	Elder5	Elder6	Elder7	Avg	
self eval									
1	4	6	6	5	4	6	4	5.00	enjoyed
2	5	6	6	6	5	5	2	5.00	valuable
3	4	3	6	6	4	2	4	4.14	remembered events
4	5	6	2	6	4	2	2	3.86	remembered people
5	5	6	6	6	6	5	3	5.29	feel good
6	6	6	6	6	6	5	2	5.29	sense of control
7	5	6	6	6	5	6	5	5.57	blessings
8	6	6	6	6	5	5	2	5.14	strengths
9	6	5	6	6	5	5	2	5.00	forgiveness
10	6	6	6	6	4	6	3	5.29	past in perspective
11	5	5	6	5	5	5	2	4.71	insights of myself
12	6	6	6	5	4	6	4	5.29	positive future
Avg	5.25	5.58	5.67	5.75	4.75	4.83	2.92		

Looking at the averages of the items with his score excluded, we see a rise in all the

scores, and not insignificantly for certain questions. As far as affecting the analysis, he is

the classic outlier and his score should be given less weight.

The two memory questions did worse than all the other questions. The "helped me

remember people I had forgotten about," and "helped me remember events" were the

only questions to average below a five and they were considerably lower, even when

Elder7 was taken out completely. However, neither of them measure an actual affect on

the psyche. Remembering events and people are only important as far as they promote

other emotional and intellectual factors that help the Elder process the past. It is quite

possible that the material they most need to work on is very accessible to them and they

do the work they need to do without remembering something new.

	(with)	(without)
	Avg	Avg
enjoyed	5.00	5.17
valuable	5.00	5.50
remembered events	4.14	4.17
remembered people	3.86	4.17
feel good	5.29	5.67
sense of control	5.29	5.83
blessings	5.57	5.67
strengths	5.14	5.67
Forgiveness	5.00	5.50
past in perspective	5.29	5.67
insights of myself	4.71	5.17
positive future	5.29	5.50

While enjoying the life review shows little, all the other questions highlight

factors that are important in the emotional, mental and spiritual well-being of the

participant.

There was also the anectodotal evidence. Many of the Elder in private

conversation, echoed some of the statements of L.

Me: Has our life review sessions had an effect on you.
L: Yes, it has helped me remember. {pause} Things I could have done differently
Me: Does that make you happier or sadder?
L: Happier As I'm growing older. When your younger, you take things harder.
Me: How else has It affected you.
L: It has helped me express my feelings more.
Me: Learned any lessons?
L: I'm older and I forget and forgive.
Me: You've forgiven people
L: I believe in God - he's forgiven me and I can forgive others. There all dead and gone.
Me: Were you able to find peace?
L: Yes. Peace of forgiveness. Peace of happy occasions. Birthdays. Vacations.

So L feels that she has benefited from life review in many of the ways one would expect. She's remembered old times and times of happiness, ways that she might have done things differently. But she feels that she doesn't take things as hard now that she's older. It has helped her "forgive and forget". And unexpectedly, helped to be more in touch with her feelings. If only all the participants were able to express themselves so well.

Chapter 7:   **<u>FINAL REMARKS</u>**

Now that the study is completed, I very much believe the seniors I worked with are better off for having been in it. But, one could ask, have they benefited spiritually? I believe that **they** believe so. If integrity represents much of spirituality, then I have to agree as well. I base this primarily on the almost uniformly positive feedback from the retrospective questions. The main point of life review is to get to a state of Eriksonian integrity. Integrity is the ability to accept one's whole self - one's entire past. The last half of the retrospective questions (Appendix IV) are all indicators of moving towards integrity. To look back and remember one's blessings (7)[115] and one's strengths (8) is so important in trying to reshape one's narrative. The ability to forgive oneself and others (9) is a key part to getting past what holds us back and letting go in order to move forward and getting on with the work we need to do. The idea of "putting the past in perspective" (10) is EXACTLY what we expect as we change the narratives of our lives. Looking forward to the future (11) - may be indicating a movement beyond integrity to gerotranscendence. Getting new insights about oneself is part of reframing one's narrative. Looking at one's past in a new way, with a different slant. To have a more positive view of the future (12) - is such a change from how many began. Many responded what are you looking forward to, with a question back to me, "At my age - what have I to look forward to?" All of these answers point in the direction of moving towards integrity.

The Brown gerotranscendence numbers suggest that the study may have then to make progress on the ninth stage. Dealing with and moving beyond the bodily problems

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[115] Numbers in parentheses here refer back to the question number from the Brown

they experience. Finding happiness in what they do in the present. Taking time to just to think. Looking beyond themselves.

So much of our spiritual search is the search for integrity. Have I made a difference? Why am I here? These are questions that everyone asks. One of my growing points is realizing how universal these questions are. From my tradition I have learned that it is never to early to begin the work leading to integrity. From life review, Tornstam, Erickson and Peck, that neither is it ever too late - as long as it happens. This brings us back to Rabbi Eliezer's "Repent one day before you die." We never know when exactly we will die. But as we age we feel the time we have left grows shorter and shorter. Clearly, starting sooner rather than later can be helpful, but re-evaluating, making it explicit, even saying it out loud, as Rabbi Soloveitchik said, cannot be avoided in later life, for we are different people than we were 30, 20, even 10 years ago.

How do we make meaning in our lives is a difficult and necessary question, particularly for the aged. Rabbi Dayle Friedman[116], who has worked with seniors for 20 years, believes that seniors want to do many of the same things that younger people do. They want to extend themselves to help others, they want to worship together as a community, they want to study and learn in classes. But they feel they can not anymore, because of their limitations due to their age. Rabbi Friedman has spent a career making these activities accessible to seniors. And she has received a tremendous response.

It is questionable if this type of spirituality is available to or even desired by the older-old. Tornstam's observations that as elders move toward gerotranscendence, they become more insular, more choosy about to whom they reach out and in what activities

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Gerotranscendency Scale.

[116] Friedman, Dayle. (2008) *Jewish Visions and Aging* Jewish Lights Burlington, Vt.

they partake. I feel lucky, that as an outsider, they were willing to include me in their

circle of activities. This interiority may be part of the explanation of why there was such

a high (over 50%) refusal rate.

One of the things that I've learned is that there are "ways of being" I cannot

fathom. Particularly if what Tornstam is true (and I suspect it is at least for some - raising

the question do we all need to work the same way) I cannot possibly understand their

reality. I can be with them in the "space between" as a chaplain, but I can't really "put

myself in their shoes".

What are the implications of this study? This study is just one more confirmation

that life review produces positive results in seniors, both spiritually and psychologically.

But it is not done as often as it could be, partly because it is unclear who should do it.

Haight (1989) recognized this problem and titled one of her early articles "Life Review:

A Method for Pastoral Counseling: Part I." Departments of Spiritual Care and Pastoral

Counseling are now a regular part of hospitals' organization. This is a fairly recent

phenomenon. Others argue that nurses should be the ones giving life review. Still others

argue for social workers and/or recreational therapists. Where these turf battles are

settled, life review is growing in availability. For me, the fact that life review has such

power to help elderly individuals make progress, makes a compelling case to let everyone

do it. At it's root, life review is story telling. Getting people to tell stories about

themselves crosses departmental lines. It is part of nursing, social work, pastoral care and

even medical care, depending on the story. Put a group of story tellers together and it

becomes recreational therapy. Anyone can listen, ask questions, and be the receptacle of a

piece of personal history. For me, it is literally a part of what it means to be immortal,

when someone knows and carries with them, your story.

As I mentioned in my introduction, I too, am on a spiritual journey. I too am searching for meaning. I now see that there are bits of treasure buried within me. I haven't done a formal life review, but am often reviewing my past and what decisions I have made. Insights have come to me during these times. But that is not enough. I am not at the age where I can come to terms with my past just by reviewing and thereby reframing it. This seems to be a gift given to those blessed with years. I am still looking forward. But I now do so knowing that there will come a day when my life of achievement is over. When I can no longer say, "I'll get to that;" when I can say - "I'll change." There will come a time, when I will have to accept what I've done and who I've been and say "I can be proud" or not. More than anything else, on a personal level this project, has given me the motivation seek out ways to act with integrity - to reach for acts that, when looking back thirty years hence, I will say, I was proud of that.

Another thing that I gained from this experience is a new appreciation for spirituality (not the kind that comes in a bottle, as Dr. Kravitz would say). As a rationalist, spirituality has always felt very mystical to me. Something that one needed to experience in order to appreciate it. It had not happened, and I had other things to do while I was waiting. The idea that spirituality is the search for meaning is something I can grasp, something that I can take part in.

This experience is just one of many that is moving me away from congregational life towards chaplaincy. There are moments when I am with an individual, hearing their story, that I feel more connected to holiness than I ever have in prayer.
In conclusion I'd like to quote my colleague and friend, Rabbi Jack Stern, who imagines

us all on a Jacob's ladder of our own:

> [I]n solitude, we ponder the mysteries and meanings of life and death - including our own death … we know that winter is in the offing and that our days on earth will come to an end. So we try to fit together all the pieces of our lifetime, what is sometimes called a "life review": how some of what we did made a difference, and how some of what we failed to do could have made a difference but we didn't know at the time. When we are up there putting the pieces together, now and again coming across a broken piece, not yet fixed … there to become part of our life review. When we come back down the ladder, all these broken pieces can help us still fix what deserves to be fixed. We can engage in the serious spiritual business of settling our grudges, seeking forgiveness, and granting it, tending to our unfinished business. We needn't wait until Yom Kippur. And so we include in our life review also the values and truths we have come to prize the most, and when we do that, we have in the words of the Psalmist, "Gotten us a heart of wisdom" (Psalm 90:12)[117] [65-66]

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[117] Stern, Jack "Spiritual Aging" in That You May Live Long" 62-67

LIST OF APPENDICES

A. Letter of Consent

B. Demographics Questionnaire

C. Measures of Spirituality

    1. Augustana Spiritual Assessment Questionnaire
        Original Spiritual Assessment Tool (broad measure)
        As presented at Group Meeting of Wed. Feb. 17.

    2. Spiritual Well-Being Scale (SWBS)

    3. Brown Stage 9 Spirituality Measure.

    4. Evaluative "look back" question.

D. Life Review Questions

    1. LREF by Barara Haight

    2. Adolescent Questions by Donald Patterson

Bibliography

APPENDIX I - SAMPLE LETTER OF CONSENT

Lutheran Augustana Center
Extended Care and Rehabilitation.

SPIRITUAL LIFE REVIEW RELEASE

Date: _____

Resident: _____   Rm: _____

I agree to participate in a "Spiritual Life Review" given by Rabbi Joshua Minkin in pursuit of his Doctorate of Ministry Degree. The "Spiritual Live Review" includes the completion of an initial spiritual assessment, sharing of my personal autobiography and the completion of a closing assessment. I will be interviewed by Rabbi Minkin individually for 5–8 sessions and will participate in group discussion for 1–4 sessions over a 6 week period. I understand that the information I provide will remain confidential, neither my name nor information I disclose during these conversations shall be identifiable with me in material prepared and/or discussed by Rabbi Minkin. I understand that Rabbi Minkin will provide me with an audio and/or written transcript of my interview. I further understand I may withdraw from participation at any time.

☐ Yes, I consent

☐ No, I do not consent

_____   _____
      Signature of Resident   Date

_____   _____
        Witnessed By   Date

cc: Assistant Administrator

APPENDIX II - DEMOGRAPHIC QUESTIONS

Name: Age:

Country of birth.

      If not USA: When did you come to the US?

What is your mother tongue?

Are you currently or have you been married?

Have you been married more than once?

When did you lose your spouse?

Do you have children?

What are the ages of your children?

Do you have grandchildren?

What are their ages?

Have any of your children or grandchildren pre-deceased you?

Do you have any siblings?

Are they still alive? When did they die? Where did they live?

How old were your parents when they died?

How old were you when your parents died?

When did you move to Brooklyn?

Did you go to college or university?

What was the final grade of school you attended or what degrees did you receive?

What is your religion, if you have one?

Have you ever changed religions?

Are you a spiritual person? What does that mean to you?

Are you a religious person? How does that differ?

Did you grow up primarily in an urban, suburban or rural area?

APPENDIX III - SPIRITUAL ASSESSMENT TOOLS

1. Augustana Spiritual Assessment Questionnaire

1. There is a part of me that seems eternal.

Strongly Agree   **Moderately Agree**   **Slightly Agree**   **Slightly Disagree**   **Moderately Disagree**   **Strongly Disagree**

1a. I believe in an afterlife.

Strongly Agree   **Moderately Agree**   **Slightly Agree**   **Slightly Disagree**   **Moderately Disagree**   **Strongly Disagree**

2. I have a sense of balance/fulfillment in my life.

Strongly Agree   **Moderately Agree**   **Slightly Agree**   **Slightly Disagree**   **Moderately Disagree**   **Strongly Disagree**

3. I feel unsettled about my future.

Strongly Agree   **Moderately Agree**   **Slightly Agree**   **Slightly Disagree**   **Moderately Disagree**   **Strongly Disagree**

4. Even when I feel discouraged, I trust that life is good.

Strongly Agree   **Moderately Agree**   **Slightly Agree**   **Slightly Disagree**   **Moderately Disagree**   **Strongly Disagree**

5. I often think about how short life really is.

Strongly Agree   **Moderately Agree**   **Slightly Agree**   **Slightly Disagree**   **Moderately Disagree**   **Strongly Disagree**

6. I feel connected to other people.

Strongly Agree   **Moderately Agree**   **Slightly Agree**   **Slightly Disagree**   **Moderately Disagree**   **Strongly Disagree**

7. I am unable to forgive people who have done me wrong.

Strongly Agree	**Moderately Agree**	**Slightly Agree**	**Slightly Disagree**	**Moderately Disagree**	**Strongly Disagree**

8. I have an inner strength that I can rely on.

Strongly Agree	**Moderately Agree**	**Slightly Agree**	**Slightly Disagree**	**Moderately Disagree**	**Strongly Disagree**

9. I feel a sense of well-being about the direction my life is headed in.

Strongly Agree	**Moderately Agree**	**Slightly Agree**	**Slightly Disagree**	**Moderately Disagree**	**Strongly Disagree**

10. I am often distressed by the way time flies so very rapidly.

Strongly Agree	**Moderately Agree**	**Slightly Agree**	**Slightly Disagree**	**Moderately Disagree**	**Strongly Disagree**

11. I believe that a Higher Power loves me and cares about me.

Strongly Agree	**Moderately Agree**	**Slightly Agree**	**Slightly Disagree**	**Moderately Disagree**	**Strongly Disagree**

12. I feel very fulfilled and satisfied with life.

Strongly Agree	**Moderately Agree**	**Slightly Agree**	**Slightly Disagree**	**Moderately Disagree**	**Strongly Disagree**

13. I feel the future holds nothing for me to fear.

Strongly Agree	**Moderately Agree**	**Slightly Agree**	**Slightly Disagree**	**Moderately Disagree**	**Strongly Disagree**

14. I feel thankful for my blessings.

Strongly Agree	**Moderately Agree**	**Slightly Agree**	**Slightly Disagree**	**Moderately Disagree**	**Strongly Disagree**

15. I feel a sacred presence.

Strongly Agree	**Moderately Agree**	**Slightly Agree**	**Slightly Disagree**	**Moderately Disagree**	**Strongly Disagree**

16. I have a lack of purpose in my life.

Strongly   Moderately   Slightly   Slightly   Moderately   Strongly
Agree   Agree   Agree   Disagree   Disagree   Disagree

17. I sometimes find myself in awe of the world around me and feel connected to some force out there larger than myself.

Strongly   Moderately   Slightly   Slightly   Moderately   Strongly
Agree   Agree   Agree   Disagree   Disagree   Disagree

18. I am not at all afraid to die.

Strongly   Moderately   Slightly   Slightly   Moderately   Strongly
Agree   Agree   Agree   Disagree   Disagree   Disagree

19. I feel that I am part of something much greater than my personal self.

Strongly   Moderately   Slightly   Slightly   Moderately   Strongly
Agree   Agree   Agree   Disagree   Disagree   Disagree

20. I am accepting of events in my life that I do not have the power to change.

Strongly   Moderately   Slightly   Slightly   Moderately   Strongly
Agree   Agree   Agree   Disagree   Disagree   Disagree

21. The thought of death never bothers me.

Strongly   Moderately   Slightly   Slightly   Moderately   Strongly
Agree   Agree   Agree   Disagree   Disagree   Disagree

22. I experience a connection to all life.

Strongly   Moderately   Slightly   Slightly   Moderately   Strongly
Agree   Agree   Agree   Disagree   Disagree   Disagree

23. I feel motivated to help relieve pain and suffering in the world.

Strongly Agree	**Moderately Agree**	**Slightly Agree**	**Slightly Disagree**	**Moderately Disagree**	**Strongly Disagree**

24. Forgiving myself and others is important.

Strongly Agree	**Moderately Agree**	**Slightly Agree**	**Slightly Disagree**	**Moderately Disagree**	**Strongly Disagree**

25. I realize that my existence in this life has great meaning.

Strongly Agree	**Moderately Agree**	**Slightly Agree**	**Slightly Disagree**	**Moderately Disagree**	**Strongly Disagree**

26. Independent of events, I can find an inner peace.

Strongly Agree	**Moderately Agree**	**Slightly Agree**	**Slightly Disagree**	**Moderately Disagree**	**Strongly Disagree**

APPENDIX III - SPIRITUAL ASSESSMENT TOOLS

B. Spiritual Well Being Scale (SWBS)

SWB Scale

For each of the following statements circle the choice that best indicates the extent of your agreement or disagreement as it describes your personal experience:

SA	= Strongly Agree	D	= Disagree
MA	= Moderately Agree	MD	= Moderately Disagree
A	= Agree	SD	= Strongly Disagree

1. I don't find much satisfaction in private prayer with God.   SA MA A D MD SD

2. I don't know who I am, where I came from, or where I'm going.   SA MA A D MD SD

3. I believe that God loves me and cares about me.   SA MA A D MD SD

4. I feel that life is a positive experience.   SA MA A D MD SD

5. I believe that God is impersonal and not interested in my daily situations.   SA MA A D MD SD

6. I feel unsettled about my future.   SA MA A D MD SD

7. I have a personally meaningful relationship with God.   SA MA A D MD SD

8. I feel very fulfilled and satisfied with life.   SA MA A D MD SD

9. I don't get much personal strength and support from my God   SA MA A D MD SD

10. I feel a sense of well-being about the direction my life is headed in.   SA MA A D MD SD

11. I believe that God is concerned about my problems.   SA MA A D MD SD

12. I don't enjoy much about life.   SA MA A D MD SD

13. I don't have a personally satisfying relationship with God.   SA MA A D MD SD

14. I feel good about my future.   SA MA A D MD SD

15. My relationship with God helps me not to feel lonely.   SA MA A D MD SD

16. I feel that life is full of conflict and unhappiness.   SA MA A D MD SD

17. I feel most fulfilled when I'm in close communion with God.   SA MA A D MD SD

18. Life doesn't have much meaning.   SA MA A D MD SD

19. My relation with God contributes to my sense of well-being.   SA MA A D MD SD

20. I believe there is some real purpose for my life.   SA MA A D MD SD

APPENDIX III - SPIRITUAL ASSESSMENT TOOLS

C. Brown Stage 8 & 9 Gerotranscendence Scale

1. I have moved beyond the fear of death.

2. I feel increasingly close to those who have gone before me.

3. I can accept the changes brought about by aging.

4. Overcoming the challenges of later life lifts my spirits.

5. I like the slower pace of life as I have got older.

6. I have rediscovered some of the joy and playfulness of my younger days.

7. Later life has given me a release from the stresses of life.

8. The meaning of life seems more clear to me now.

9. I have become less interested in material things nowadays.

10. There are new positive spiritual gifts to explore in later life.

APPENDIX III - SPIRITUAL ASSESSMENT TOOLS

D. <u>Retrospective "Look Back" Questions</u>

1. I enjoyed the life review sessions with Rabbi Minkin.

Strongly Agree	Moderately Agree	Slightly Agree	Slightly Disagree	Moderately Disagree	Strongly Disagree

2. I found the life review sessions valuable.

Strongly Agree	Moderately Agree	Slightly Agree	Slightly Disagree	Moderately Disagree	Strongly Disagree

3. I remembered events in my life I had forgotten.

Strongly Agree	Moderately Agree	Slightly Agree	Slightly Disagree	Moderately Disagree	Strongly Disagree

4. I remembered details and feelings about people I had forgotten.

Strongly Agree	Moderately Agree	Slightly Agree	Slightly Disagree	Moderately Disagree	Strongly Disagree

5. Remembering my past made me feel good about myself.

Strongly Agree	Moderately Agree	Slightly Agree	Slightly Disagree	Moderately Disagree	Strongly Disagree

6. The life review sessions gave me a sense of control

in my life.

Strongly   Moderately   Slightly   Slightly   Moderately   Strongly
 Agree   Agree   Agree   Disagree   Disagree   Disagree

7. The life review sessions reminded me of my

blessings.

Strongly   Moderately   Slightly   Slightly   Moderately   Strongly
 Agree   Agree   Agree   Disagree   Disagree   Disagree

8. The life review sessions reminded me of my

strengths and capabilities.

Strongly   Moderately   Slightly   Slightly   Moderately   Strongly
 Agree   Agree   Agree   Disagree   Disagree   Disagree

9. The life review sessions allowed me to forgive

myself or others.

Strongly   Moderately   Slightly   Slightly   Moderately   Strongly
 Agree   Agree   Agree   Disagree   Disagree   Disagree

10. The life review process allowed me to put events

in the past in perspective.

Strongly   Moderately   Slightly   Slightly   Moderately   Strongly
 Agree   Agree   Agree   Disagree   Disagree   Disagree

11. The life review process gave me new insights

about myself.

Strongly Agree	Moderately Agree	Slightly Agree	Slightly Disagree	Moderately Disagree	Strongly Disagree

12. The life review process gave me a more positive view of the future.

Strongly Agree	Moderately Agree	Slightly Agree	Slightly Disagree	Moderately Disagree	Strongly Disagree

Appendix IV - Life Review Questions

A. LREF[118] by Barbara Haight

Childhood

1. What is the very first thing you remember in your life?

2. What other memories do you have about when you were young.

3. What was life like for you as a child?

4. What were your parents like?
      What were their weaknesses or strengths.

5. Tell me about your siblings, if you had siblings?

6. Did anyone close to you die when you were young?
      What impact did that have on you?

7. Did anyone important to you go away?
      What impact did that have on you?

8. Do you ever remember being in an accident?

9. Do you ever remember being sick or having health problems?

10. Was there anything important to you that was lost or destroyed?

11. Do you remember being in any dangerous situations when you were young?

12. What are some of you early spiritual memories? What were you taught about God
      and religion when you were young? What about sin? Heaven? Hell?

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[118]   Haight, Barbara. (1989) pp. 21-25

13. Think of ways you were blessed and cursed as a child?

14. What impact did nature have on your early life?

15. Describe the house in which you grew up.

16. Did you grow up in a strict household? How were you punished?

Adolescence

1. When you picture yourself and your life as a teenager,
        what is the first thing you can remember about that time?

2. What other things stand out in your memory about being a teenager.

3. Who were the important people for you? Tell me about them. Parents, siblings, friends,

teachers, those you were especially close to, those you admired, those you wanted to be

like.

4. Did you go to school? Meaning for you?

5. Did you work during these years?

6. Tell me of any hardships you experienced at this time?

7. Do you remember feeling that there wasn't enough food or necessities of life
as a child or an adolescent?

8. Do you remember feeling left alone, abandoned, not having enough love
as a child or adolescent.

9. What were the pleasant things about your adolescence?

10. What were the most unpleasant things about your adolescence?

11. All things considered, would you say you were happy or unhappy as a teenager?

From Childhood questions

7. Did anyone important to you go away or die when you were a teen-ager?
What impact did that have on you?

8. Do you remember ever being in an accident as a teen-ager?

9. Do you remember ever being sick or having health problems as a teen-ager?

10. Was there anything important to you that was lost or destroyed as a teen-ager?

Family and Home

1. How did your parents get along?

2. How did other people in your home get along?

3. What was the atmosphere in your home?

4. Where you punished as a child? For what? Who did the punishing? Who was boss?

5. When you wanted something from your parents, how did you go about getting it?

6. What kind of person did you parents like the most? The least?

7. Who were you closest to in your family?

8. Who in your family were you most like? In what way?

Adulthood

Now I'd like to talk with you about your life as an adult

      starting when you were in your twenties up to today..

1. Tell me the most important events that happened in your adulthood.

2. What was life like for you in your 20's and 30's?

3. What kind of person were you? What did you enjoy?

4. Tell me about your work. Did you enjoy work? Did you earn an adequate living?

      Did you work hard during those years? Were you appreciated?

5. Did you marry?

      (Yes) What kind of person was your spouse?

      (No) Why not?

6. Do you think marriages get better or worse over time? Were you married more than once?

7. On the whole, would you say you had a happy or unhappy marriage?

8. What were some of the main difficulties you encountered during your adult years?
a. Did someone close to you die? Go away?
b. Were you sick? Have an accident?
c. Did you move often? Change jobs?
d. Did you ever feel alone? Abandoned?
e. Did you ever feel need?

Summary

9. On the whole, what kind of life have you had?

10. If everything were to be the same, would you like to live your life over again?

11. If you were going to live your life over again, what would you change? Leave unchanged?

12. We've been talking about your life for quite some time now.
      Let's discuss your overall feelings and ideas about your life.
      What would you say the main satisfactions of your life have been? (try for 3).
      (Why were they satisfying?)

13. Everyone has disappointments. What have been the main disappointments of your life?

14. What was the hardest thing you had to face in your life? Describe?

15. What was the happiest period of your life? What about it made it the happiest period? Why is your life less happy now?

16. What was the unhappiest period in your life? Why? Why is your life happier now?

17. What was the proudest moment of your life?

18. If you could stay the same age all your life, what age would you choose? Why?

19.   A) How do you think you've made out in life?
          B) Better or worse than you had hoped for?

20. Let's talk a little about your as you are now?
          What are the best things about the age you are now?

21. What are the worst things about being the age you are now?

22. What are the most important things to you in life today?

23. What do you hope will happen to you as you grow older?

24. What do you fear will happen to you as you grow older?

25. Have you enjoyed participating in this review of your life?

B. From *Writing Your Spiritual Autobiography* by Donald Patterson.

Whom did you want to be like?

Whom did you loathe?

When did you first have to take a stand as an adolescent? {other times}

What choices did you have, and what choices did you not have?

What did you think of yourself?

What did you wish that someone could have told you at the time?

Did you like your father/mother? Why?

What did the family talk about at dinner?

What books made a great impression on you?

When did you leave home for a long time?

How did you earn money?

What day of the week did you like best?

At age 14, what were your convictions and your worries?

What was your first big disillusionment with an adult?

When, if ever, did you break with your church? Did that bring a feeling of depression or exhilaration?

What did you put in place of God?

When did you first feel like an adult?

Do you remember any experiences of deep faith or conviction of peace?

What were the powerful words at that time?

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