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Development of a Workshop for Older Adult Volunteers Using a Life Strengths Guide With Clients

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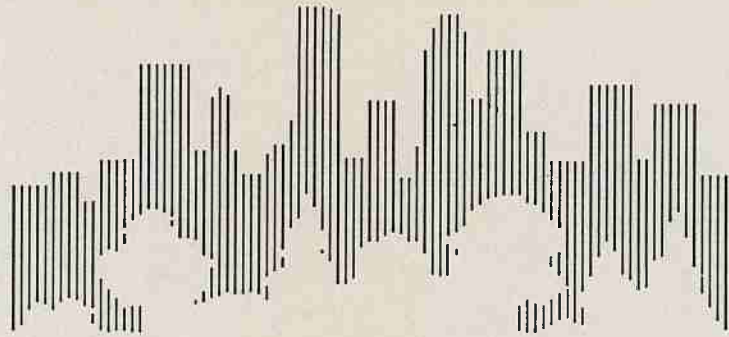Part of the Social Work Commons

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MASTERS IN SOCIAL WORK THESIS

Karen A. Strom

Development of a Workshop for Older Adult Volunteers Using a Life Strengths Interview Guide With Clients

1995

Development of a Workshop for Older Adult Volunteers:

Using a Life Strengths Interview Guide with Clients

by

Karen Strom

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MASTER OF SOCIAL WORK

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CERTIFICATE OF APPROVAL

This is to certify that the Master's thesis of:

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has been approved by the Examining Committee for the thesis requirements for the Master of Social Work Degree.

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ABSTRACT OF THESIS

Development of a Workshop for Older Adult Volunteers:

Using a Life Strengths Interview Guide with Clients

Methodology: Program Development

Karen Strom

April 20, 1995

The purpose of this project is to develop a training workshop that teaches older adult volunteers about a Life Strengths Interview Guide that can be used when working with clients. The framework of the workshop focuses on Erik Erikson's life cycle theory with a strengths perspective. The interview guide is divided into eight sections that relate to Erikson's eight psychosocial stages of life. Each section contains questions related to a specific stage in life and is intended to get the client talking about the strengths that are found in these specific areas of his or her life. The workshop is intended to give older adult volunteers who will be using the guide with their clients some background on the stages of life, information on the importance of looking for strengths in older adulthood, and practice in how to apply the questions in the guide to their work with clients.

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I. INTRODUCTION

A. Statement of Problem

Old age is often looked at in terms of the losses commonly associated with the aging process. While it is important to acknowledge and understand the many losses one faces with aging, it is equally important to understand and acknowledge the unique strengths that each older adult possesses. As one grows older, it is not uncommon to have to deal with multiple losses. These losses may include a loved one, a role in society, good health, housing, or income. There may also be less family support due to geographical distance or children having competing commitments (Johnson, 1983; Stone, Cafferata, & Sangl, 1987). Current statistics show that about 13 percent of the American population is over the age of 65 and by the year 2050 one in four Americans will be over the age of sixty-five (Clair, Karp, & Yoels, 1993). Feelings of loss, grief, and loneliness are common as a person grows older, and it is important for family, friends, and professionals to be aware of these issues and discuss them with the older person. It is equally important to find positive attributes that exist in aging people, and use these strengths to help them find hope and solutions in the midst of struggle.

B. Purpose and Overview of Training Workshop

The purpose of this project is to develop a workshop consisting of four training sessions to instruct older adult volunteers working in social service agencies on how to use a Life Strengths Interview Guide with their older clients

who need social services. The services provided help older adults maintain their independence and remain living in the community. The interview guide was developed by Dr. Helen Kivnick, a professor at the University of Minnesota, and is based on Erik Erikson's life cycle theory. This training workshop is specially designed to meet the needs of older adult learners. Ideally, the workshop participants will have clients in the community that they are working with regularly. The client may be matched with a volunteer if a need is recognized by the individual, a family member, or a professional. Examples of situations that may indicate the need for a volunteer include feelings of isolation, loneliness, grief, or chemical dependency. In these situations, a volunteer can provide companionship, someone to talk with, socialization, or a link to community resources. This workshop will teach volunteers how to help clients recognize their self-worth, beliefs, and strengths, and then integrate these positive attributes back into their lives.

The training workshop consists of four sessions that meet once a week. The sessions are two and one-half hours long, consisting of one hour of training, a twenty minute break, and then another hour of training. Each session will cover a different topic. The first will be a review of listening and interviewing skills, the second will focus on Erik Erikson's life cycle theory, the third will focus on the first half of the Life Strengths Interview Guide, and the fourth will focus on the second half of the guide. A variety of teaching methods will be used including presentations by the trainer, role playing in pairs, video examples, and group discussions. The trainer for the workshop could be a social worker or anyone who familiarizes themselves with the Life Strengths Interview Guide and its origin. Certificates of completion will be distributed at the last session. The participants will be asked to fill out an evaluation after each session focusing on the format and content of the session.

C.   Overview of Erik Erikson's Life Cycle Theory

The Life Strengths Interview Guide (see appendix E) that is the focus of this workshop is based on Erik Erikson's life cycle theory. This theory describes eight psychosocial themes central to people's lives, and provides a way to understand growth throughout the life cycle.

Each of the eight stages focus on a specific theme and each theme consists of two opposing issues. These issues are sometimes referred to as "crises", and basically they represent qualities of the personality that are being developed as a person goes through each stage in life. Individuals are balancing these strengths and weaknesses throughout life — the stages are not age specific. As Erikson himself aged, he gave greater priority to the last stages of life which is why his theory is particularly useful when working with the elderly population. In the 1970s and 1980s when Erikson focused more on the study of later life, he used narrative and life review to bring his themes to the attention of the clinical, academic, and public view (Weiland, 1993). In 1986 Erikson and his wife, Joan, and Helen Kivnick, then a clinical and research psychologist, wrote a book on a study they conducted on a group of older adults in Berkeley, California. The study involved interviews and accumulation of life history data on a group of people over 80 years old and examined how they could look over their pasts while remaining involved in the present (Erikson, Erikson, & Kivnick, 1986). After this study took place Professor Kivnick from the University of Minnesota developed a series of questions related to Erikson's life cycle theory which can be used when working with and interviewing older adults.

D. Overview of the
Life Strengths Interview Guide

The Life Strengths Interview Guide was developed by Dr. Helen Q. Kivnick, an associate professor in the School of Social Work at the University of Minnesota (Kivnick, 1993). The guide was created for social workers, case managers, family members, and anyone who may work closely with an elderly individual. The questions in the guide are associated with the eight stages of Erik Erikson's life cycle theory and designed to discover information about values in the older person. Using a guide like this with older people can help them start to think about issues that many people take for granted such as independence, health, love, and friendship, and re-introduce these issues into their lives if they are missing. Reflection on these areas is also an important task in the final stage of life according to Erikson's theory (Kivnick, 1993). Discussing these issues with a family member or other important figure in an older person's life can help form more meaningful bonds between the people involved. The information gathered from the interview guide can be translated into a unique outline of strengths to be used to help plan interventions that reflect concern for the life and care of the older person.

II. A REVIEW OF THE LITERATURE

A. Current Views of the Older Population

It is stated in some of the literature that when working with older adults the focus is on the losses commonly associated with the aging process (Kaufman, 1986; Kivnick, 1993). Examples of these losses may include separation from family members, death of a spouse, changing life roles, retirement, decrease in overall income, death of friends, and the decline in health.

This focus on loss is also often portrayed in the media with the attention being on the 'plight of the elderly', age as a 'problem', the 'graying of America', and very few positive images of age with which an older person can identify (Friedan, 1993). Research by Bass, Caro, and Chen (1993) that studied age role portrayals in television discovered that television rarely portrays positive images of older people. Portraying a youthful image is looked upon with favor by society and is a predominant value in today's culture. Therefore it is not surprising that ageism is a problem for all older people. The stereotype that youth is beautiful and old age is not beautiful is an attitude that has long been implanted in the American society.

Robert Butler (1980) described the problem of ageism as having three distinguishable aspects:

1) Prejudicial attitudes toward the aged, toward old age, and toward the aging process, including attitudes held by the elderly themselves; 2) discriminatory practices against the elderly, particularly in employment, but in other social roles as well; and 3) institutional practices and

policies which, often without malice, perpetuate stereotypic beliefs about the elderly, reduce their opportunities for a satisfactory life and undermine their personal dignity (p. 8).

These aspects have turned the natural process of aging into a social problem that has harmful effects on the aging population.

There was a time when older people in society (and in some cultures this is still true) were looked up to as the ones who bore tradition, provided continuity, and guarded ancestral values (Erikson et al., 1986). Older adults were considered trustworthy and took on roles such as counselors, advisors, and prophets. This was a time when older adults were connected with their community. According to Palmore (1990), there are economic costs if the wisdom, social supports, and cultural resources of older adults are ignored. Most traditional societies still use the resources of their older citizens and many of the social problems in our society might be related to our neglect of these resources (Palmore, 1990).

With the arrival of technology and the high value and importance society places on it, older people no longer provide continuity for society as their children and grandchildren grow up in a world with technical knowledge and scientific training. Because of this, older people often find themselves detached from the people around them. This has caused society to label the older population as unproductive, inadequate, and inferior. What is needed is some insight into how older people in our society can become a more vital part of the community. Gerontologists have noted that people's perceptions of aging and the aged have been shaped in large part by traditional, scientific paradigms in gerontology that have a narrow theoretical focus, reflect the dominant values of the researchers themselves rather than some objective truth, and depict aging in mostly negative terms (Kaufman, 1993). This could be changed by listening

more to older people's life experiences and what it is that gives the older person meaning in life. Society is confronted with a variety of issues and challenges as the older population becomes a significant proportion of the total populace.

B. Life Review in Older Adulthood

It is stated that reminiscing in old age is "part of a normal life review process brought about by realization of approaching dissolution and death" (Butler & Lewis, 1983, p. 53). Reminiscing is the progressive return to looking over past experiences and especially those experiences that involve unresolved conflicts which can be looked at again and reintegrated. It is believed that all people review their lives in the final years as a way of putting life into order before death. The term "life review" refers to a "slow, detailed reconsideration and integration of past experiences" (Carlson, 1984, p. 83) and includes reminiscence, but is not synonymous with it. Gerontologists have come up with ways of affirming the totality of the life each one of us has lived as a necessary review of life before death, or as a legacy for children and grandchildren (Friedan, 1993). Reviewing one's life can have positive and/or negative effects on a person. Feelings that this reassessment of life can bring about include depression, acceptance, satisfaction, guilt, or despair. Positive aspects of life review involve righting old wrongs, making up with enemies, having a sense of accomplishment, and feeling one has done his or her best (Thompson, 1992).

The meaning of life as one has lived it can be discovered by doing a life review in old age. This is seen as a task of age itself, not just as a legacy for one's grandchildren (Butler & Lewis, 1983). There are many ways that one can go about life review. Story telling and reminiscing, either with or without

someone there to listen, are popular methods. Others include creative autobiography or journal sessions to help older people look at and face the dilemmas of their youth and middle age, and to see the totality of their lives (Friedan, 1993). Another method of life review described by Friedan (1993) is through a workshop where participants are asked to describe their lives as a branching tree and discuss what kind of tree it is and how it grows and branches. This type of workshop can help a person reorganize life material by unlocking important events and feelings that allow the person to let go of the past and embrace the future (Friedan, 1993). Another study showed how creating an imaginary "scrapbook" in the mind of meaningful exploits, successes, and achievements from the past helped to alleviate a client's depression and anxiety (Hossack, McInPsychol, & Standidge, 1993).

Kaufman (1993) suggests that the voices of individual people are lost when research involving experimental science is applied to the study of aging. Asking older people to look back and talk about their own experiences over their life course in order to explain the nature of the aging process gives a better understanding and concentrates on how older people themselves interpret this experience. Kaufman found through many one-on-one discussions with older people that by interpreting and recreating the past, meaning can be drawn and used as a resource for the present. Meaning can be found in aspects of the person's social and educational background, family, work, ideals, values, and expectations. In this way an older person's sense of self is ongoing, continuous, and creative (Kaufman, 1986).

According to Kaufman (1993), practitioners should be aware of and try to understand their client's sense of self so that appropriate, meaningful interventions can be put into action. It is important for practitioners to get to

know each of their clients, what matters to them, and the social and historical context of their decision-making in order to develop and start a service plan.

Along with the current view that aging is negative and problematic is the belief that older people live in the past rather than the present and that reminiscing and historical events from the person's life are more important and more pertinent to older people than current concerns and thoughts about the future. Thompson (1992) suggests that since the 1980's there has been a new willingness to listen to older clients. This is reinforced by the growing use of reminiscence by mental health professionals and social workers. Thompson also notes that only a life history approach can interpret the complex needs and interests of clients because aging is a process where needs and interests result from a culmination of a whole lifetime of experiences. The life review is a healthy and necessary process of aging and should be recognized in daily life as well as used in the mental health care of older people (Butler & Lewis, 1983).

C. A Discussion of Aging Theories

According to Maldonado (1987), theory and theory development have played secondary roles in the field of aging and relatively little has been offered in the way of understanding and explaining the process of aging even though adult development is still a period of continual change. Some theories that have been developed in order to try and make sense of the aging process include disengagement theory, activity theory, minority group theory, subcultural perspective, age stratification theory, and social exchange theory (Maldonado, 1987). Clair, Karp, and Yoels (1993) have broadly characterized some of these types of theories and others that are currently in the area of aging as follows:

1) Integrational Theories:

a. <u>Structural Functionalism</u>: This theory dominated sociological thinking in the early 1960s. It stresses how the various social elements are integrated with each other in order to produce and sustain order in society. This theory stresses the harmonious integration of people into society and the manner in which adoption of culturally prescribed roles contributes to overall order in society (Clair et al., 1993).

b. <u>Disengagement Theory</u>: This theory is one of the first efforts of proposing a theory in social gerontology (Maldonado, 1987). It suggests that withdrawal from being actively involved in society and from the roles of middle adulthood by older people is inevitable. Withdrawing contributes to society's equilibrium which causes older people to become less involved while younger people begin to engage in society's activities. People who remain involved as they age are seen as "unsuccessful adjusters to old age, off time disengagers, or members of a biological or psychological elite" (Clair et al., 1993, p.21).

c. <u>Activity Theory</u>: This theory was developed as a response to the problems that were named concerning disengagement theory. Activity theory claims that adjusting to old age successfully involves remaining active and integrated into society through maintaining valued roles. The more active an older adult is, the more integrated into society and satisfied the individual will be. Higher life morale can be experienced if one remains actively involved in society (Clair et al., 1993).

d. <u>Minority Group Theory</u>: This theory looks at older adults as a minority population. This is to suggest that they experience lower socioeconomic status, prejudice, discrimination, and other factors that other minority groups have also experienced (Maldonado, 1987).

2) Developmental Theories:

a. <u>Developmental Aging Theories</u>: These theories focus on stages through which everyone is assumed to pass as they grow older. Life cycle scholars argue for the continuity of developmental psychosocial processes throughout the entire life cycle (Kivnick, 1993). The life cycle theorists tend to devote more attention to childhood than adulthood. Three men who have done contemporary studies of the life stages are Daniel Levinson, Roger Gould, and George Vaillant (Friedan, 1993). These men all have identified developmental phases and age-specific turning points that characterize the adult journey (Erickson & Martin, 1984). Their theories were based on Erik Erikson's life cycle theory which is credited for laying some of the major foundations in this area (Erickson & Martin, 1984). These theorists all share a belief that adult growth follows a sequence of stages, but they differ in the psychological processes and themes in development.

Levinson is criticized for expressing the need to hold on to youth even in old age (Friedan, 1993). Based on Erikson's model, Levinson uses life history interviews with clients, but instead of focusing within the person, like Erikson, he (Levinson) "places more emphasis on societal influences, with more direct concern on the boundary between the self and the world" (Erickson & Martin, 1984, p. 164).

Gould describes development as characterized by rejecting false assumptions about one's life that are rooted in childhood experiences (Erickson & Martin, 1984). Adult development has four stages that Gould distinguishes as each having a false assumption that needs to be worked through using developemental tasks.

In Vaillant's perspective, the age adult development reaches it's peak is in the mid-forties (Friedan, 1993). His framework is unique in that he focuses on

individual differences in order to understand better why some men appear to resolve the issues in Erikson's stages better than others (Erickson & Martin, 1984).

Clair et al. (1993) state their reservations about the existence of universal life stages that can be applied to every culture. Some societies may have stages in life that other societies do not have. Even within the same society, not everyone may follow through the same life stages. This may be due to class, and whatever passages through life stages a person experiences will relate to her or his place within the larger social structure (Clair et al., 1993).

3) Subcultural Theories:

a. Arnold Rose's Theory: This theory suggests that all older adults share two critical experiences that make up a subculture: First, they have an alliance with each other, and second, they are not included in the interactions of other population groups (Clair et al., 1993). Retirement causes older adults to lose contact with the larger society and causes more contact with people their own age. This theory suggests that the elderly form themselves into a subculture that has its own norms, values, and lifestyles. Age discrimination and a sense of mutuality have contributed to the potential emergence of an aging subculture.

b. Age Stratification Theory: This theory refers to the conceptualization of a society divided by age and social class. This theory is helpful because it de-emphasizes chronological age and emphasizes the course of life and the historical dimensions shared by people the same age. This suggests that each generation of cohorts (people born within a given five year period) of older persons is unique, reflecting the particular experience of that generation.

Butler and Lewis (1983) contend that the study of human development has tended in the past to stop at adolescence, but now there is more study of mid-life. They state that developmental theories need enlargement and

expansion to provide a full account of human nature and such an effort would give further direction to the treatment of older adults (Butler & Lewis, 1983).

Finally, there is Social Exchange Theory: Social exchange theory views aging as an exchange, so social interaction between older adults and society perhaps is maintained because the exchange is rewarding (Maldonado, 1987). If there is an imbalance in this exchange or a dependency involved, then problems occur because of the power involved on one side of the relationship.

D. The Importance of Erikson's Life Cycle Theory

Erikson's life cycle theory outlines the whole life cycle and gives awareness to the unique role of the older person within the life cycle (Weiland, 1993). According to Weiland (1993) "even influential developmental theorists who disagree with Erikson's approach call it probably the single most important theory of adult personality development...Erikson's views of adulthood...have become received wisdom in all their details" (p.17). There are many theories that exist that explore the different aspects of old age, but a comprehensive personality theory of old age has not yet been formulated (Carlson, 1984). It is important for old age to be anticipated which is why people should understand the stages one experiences throughout life.

For many years Erikson's theory was best known for its specification of the identity crisis in adolescence. But Erikson gave greater priority to adulthood and later life by reviewing his theory when he himself was in the stage of old age. Erikson was the only life-span theorist to look back at life from the final stage and try to understand and spell out ways in which each earlier stage of life is replicated in the wisdom of old age (Weiland, 1993). With each stage being related to the others and having much significance, Erikson wrote "any

span of the cycle lived without vigorous meaning, at the beginning, in the middle, or at the end, endangers the sense of life and the meaning of death in all whose life stages are intertwined" (Carlson, 1984, p. 84). Erickson and Martin (1984) wrote that it is important for social workers to understand the qualitative differences in adult understanding and resolve their challenges and crises and a greater wholeness in understanding is needed.

Betty Friedan (1993) states that extreme variability is found in age, meaning that people over age sixty are more different from each other than any other time in life. Aging is a process of becoming more oneself. The ability to maintain self-esteem and identity in old age depends in part upon the ability to reflect on active participation in and contribution to an ongoing cycle of generations (Friedan, 1993).

E. Background of Erikson and His Life Cycle Theory

1. Erikson's History

Erik Erikson was born in Germany in 1902. While he was growing up, Erikson had a strong desire to become an artist. He became involved in the Freudian circle accidentally when he moved to Vienna to teach art and other subjects to children whose parents had come there to study under Sigmund Freud. He went on to study psychoanalysis with Anna Freud, Sigmund's daughter, as his psychoanalyst. In 1933 he came to the United States and worked at Harvard Medical School as a child analyst. Throughout his life he worked with many universities and hospitals. Other areas he studied include combat crisis in troubled American soldiers in World War II, child-rearing practices among the Sioux Indians in South Dakota and Yurok along the Pacific Coast, the play of disturbed and typical children, the conversations of troubled

adolescents suffering identity crisis, and social behavior in India (Miller, 1983).
He also was concerned with the rapid social changes in America and wrote
about issues such as the generation gap, racial tensions, juvenile delinquency,
changing sexual roles, and the dangers of nuclear war.

Erikson based his theory on aspects of Freudian theory. There are three
ways in which Erikson expanded on Freud's theory. First, he developed a set of
eight psychosocial stages that span the life course. Because Erikson had
worked in various cultures he was convinced of the need to add a psychosocial
dimension to Freud's theory of psychosexual development. Second, Erikson's
theory sees the quest for identity as a main theme in life which contrasts with
Freud's concern with how people defend themselves from unpleasant tensions
(Miller, 1983). Identity is the understanding and acceptance of both self and
society (Miller, 1983). At each stage in life a person should ask "Who am I?"
and form a different answer. Early forms of identity influence later forms. Third,
Erikson developed methods for studying development that reach beyond the
structured psychoanalytic setting used with adults. These include direct
observation of children, cross-cultural comparisons, and psychohistory (Miller,
1983).

2. General Nature of Erikson's Eight Stages in the Life Cycle

Maturation and society's expectations together create eight crisis or
issues that a person must resolve throughout life (see Figure 1). These issues
relate to qualities of the personality that are developed throughout the course of
life. Each stage in the life cycle has an evident issue in it, but the issues may be
worked on during any stage throughout the life cycle. The issues at each stage
in life have alternative positive and negative outcomes. Throughout life,
individuals are working on balancing these personal strengths and
weaknesses. Erikson claimed that it is never too late to resolve any of these

crises [i.e. many adults are still struggling to develop a sense of identity (the crisis in adolescence)]. Each stage builds on the previous stages and influences the form of later stages (Erikson, Erikson, & Kivnick, 1986).

Figure 1:

Erikson's Psychosocial Themes and Stages of Life

Old Age								Integrity vs. Despair. WISDOM
Adulthood							Generativity vs. Self-absorption. CARE	
Young Adulthood						Intimacy vs. Isolation. LOVE		
Adolescence					Identity vs. Confusion. FIDELITY			
School Age				Industry vs. Inferiority. COMPETENCE				
Play Age			Initiative vs. Guilt. PURPOSE					
Early Childhood		Autonomy vs. Shame. Doubt. WILL						
Infancy	Basic Trust vs. Basic Mistrust. HOPE							

[source: Erikson, E. H., Erikson, J., & Kivnick, H. Q. (1986). Vital involvement in old age. New York: W. W. Norton & Co.]

3. DESCRIPTION OF THE STAGES

The following section gives a summary of each of the eight stages in Erikson's life cycle theory. The book titled *Theories of Developmental Psychology* by Patricia Miller (1983) gives a thorough description of each stage, portions of which are summarized below:

Stage One: Infancy
(Basic Trust vs. Mistrust) HOPE

Infancy is the first stage of Erikson's theory and occurs from birth through roughly the first year. The main task at this stage is to get a good balance of trust and mistrust. Basic trust is defined as a trusting of others as well as a sense of one's own trustworthiness (Miller, 1983). Mothers, or those who may serve that role, are very important to the child in that they create the environment for a child's development of a sense of trust. This is done primarily through feeding the child when hungry and comforting the child when pained or frightened. Some mistrust is necessary at all ages in order to discover danger or discomfort and to distinguish between dishonest and honest people, but if it takes over, a person may become withdrawn, frustrated, suspicious, and lack self-confidence (Miller, 1983). By taking from the mother and the world, a baby is laying the foundation for his or her later role as a giver to others. Hope is the strength or virtue that emerges out of this stage which is created by a balance of trust and mistrust (Erikson et al., 1986). As a person ages, an infant's trust is related to an older person's appreciation for human interdependence.

Stage Two: Early Childhood
(Autonomy vs. Shame and Doubt) WILL

Early childhood takes place at roughly two to three years old. The child becomes more independent physically and psychologically. New anxieties and vulnerabilities arise from separation from parents. Ideally, the child will be

raised in an atmosphere that is supportive and where the child can develop a sense of self-control without a loss of self-esteem (Miller, 1983). The positive issue in this stage is autonomy. The negative is shame and doubt. Shame is defined as feeling completely exposed or self-conscious. Shame and doubt about independence and self-control appear if basic trust is not adequately developed (Miller, 1983). Failure to coordinate the opposing tendencies of autonomy and shame and doubt can lead to the "anal personality" described by Freud as over controlled, compulsive, messy, stingy, or rigid. The child also encounters rules at this stage. Will is the strength or virtue that arises out of this stage by having a sense of control over one's behavior, body, and life. Childhood's increasing control over body functions versus shame is related to the acceptance of bodily deterioration in old age.

Stage Three: Play Age
(Initiative vs. Guilt) PURPOSE

The play age occurs roughly around the age of four to five years old. In this stage the child must find out what kind of person he or she is going to be. Most often the child wants to be like his or her parents. The theme at this stage is identification with the parents who are perceived as big, powerful, and intrusive. The basic psychosocial modality here involves intrusion, taking the initiative, forming and carrying out goals, and competing (Miller, 1983). Initiative may be seen in physical attack, aggressive talking, vigorous locomotion, and consuming curiosity. This initiative is supported by advances in mobility, physical dexterity, language, cognition, and creative imagination. There may be feelings of overwhelming guilt due to an overly severe conscience that punishes sexual fantasies and immoral thoughts or behavior (Miller, 1983). The child may feel he or she must always be doing something active in order to

have any worth as a person. Purpose is the strength or virtue that arises in this stage by having the courage to pursue goals in life (Erikson et al., 1986). Childhood's playfulness is related to an older person's resilience, empathy, and humor.

Stage Four: School Age
(Industry vs. Inferiority) COMPETENCE

The age for this stage is six roughly through puberty. It is at this stage that the industrial age begins. The child wants to enter the larger world of knowledge and work. The theme here is "I am what I learn" and the great event is entry into school. Success in school brings feelings of competence and mastery (industry) (Miler, 1983). Failure brings a sense of inadequacy or inferiority. Erikson notes the difference in this stage compared to the first three is that it is calmer (Miller, 1983). Competence is the strength that arises in this stage through the free exercise of dexterity and intelligence through the completion of tasks, and unimpaired by a threatening sense of inferiority (Erikson et al., 1986). Competence in youth is related to humility in old age and is built on the integration of a lifetime of ability and inability.

Stage Five: Adolescence
(Identity vs. Confusion) FIDELITY

Trust, autonomy, initiative, and industry (all from previous stages) contribute to a child's identity (Miller, 1986). The concern about identity heightens in this stage. There are changes in the body, unfamiliar sexual urges, and social pressure to make school and work decisions. The basic task in this stage is to integrate the various identifications the person brings from childhood into a more complete identity (Miler, 1983). This whole (the identity) is greater than the sum of its parts (previous identifications). This reassembled

identity is appropriate for the new needs, skills, and goals of adolescence. Confusion occurs if the person's identification, roles, and self are unable to be combined together. As a result of this, his or her personality may be fragmented and lacking a core. Fidelity is the strength that emerges in this stage as one increases the capacity to be loyal to others and to trust others and oneself (Erikson et al., 1986). In old age, identity is defined in other ways than mastery and abstract knowledge. It is defined by feelings, intuitions, intimacy, and tenderness. It involves accepting love that has either been expressed or unexpressed over the course of a lifetime.

Stage Six: Young Adulthood
(Intimacy vs. Isolation) LOVE

Psychological intimacy with others and oneself can emerge only if a reasonably well integrated identity emerges from Stage Five. Relationships with the opposite sex, same sex, and oneself enhance ones own identity and growth of personality (Miller, 1986). If intimacy fails, isolation may follow. Isolation involves social relationships that are stereotyped, cold, and empty. Love is the strength that evolves with success in intimacy with oneself and others (Erikson et al., 1986).

Stage Seven: Middle Adulthood
(Generativity vs. Stagnation) CARE

Erikson (1980) defines generativity as the interest in establishing and guiding the next generation through child rearing, creative or productive endeavors. Prerequisites that exist for this stage include faith in the future, a belief in the species, and an ability to care about others. Instead of having children, a person may work to create a better world for the children of others. This stage provides the mechanism for the continuation of society from

generation to generation. Stagnation is described as a lack of generativity, self-absorption (self-indulgence), boredom, and lack of psychological growth (Miller, 1983). Care is the strength that evolves through concern for what has been generated by love (Erikson et al., 1986).

Stage Eight: Late Adulthood
(Integrity vs. Despair) WISDOM

Late adulthood is the final stage of Erikson's life cycle theory. If a person has a sense of integrity in this stage of life, then he or she has accepted the limitations that late adulthood can bring and has a sense of being a part of a larger history that includes generations before them. During this final stage in the life cycle, an individual should understand and accept that life is a product of a person's choices and work. If a person does not achieve this sense of integrity, his or her life will lead to despair, depression, suicide, or a deep fear of old age and death (Friedan, 1993). Despair involves regret for what one has done or not done with his or her life, fear of approaching death, and not accepting oneself. Wisdom is the strength that results in this last stage of life and is described by Erikson (1982) as "informed and detached concern with life itself, in the face of death" (p.61).

4. Personal Development

Erikson viewed development as the resolution of conflict from opposing forces. He held an optimistic view of human nature and believed that people (children and adults) not only seek to avoid pain, but also actively seek to develop a positive sense of identity (Miller, 1983). To Erikson, a person's culture plays a major role in nurturing and shaping the developing child or adult. The developing person is influenced by his or her own past and present

as well as the norms of society in the past and present. Erikson emphasizes that development is a lifelong process and sometimes childhood conflicts are not resolved until adulthood. Finally, for Erikson, the goal of development in life is to form an identity that fits the person's personality (Miller, 1983).

5. Critiques of Erikson's Life Cycle Theory

According to Weiland (1993), "even influential developmental theorists who disagree with Erikson's approach call it perhaps the most important theory of adult development" (p. 17). Clair, Karp, and Yoels (1993) have reservations about the existence of universal life stages in any society and also within the same society. They argue that life stages occurring in any society are products of history and culture, and in some societies certain stages of Erikson's may not exist. The authors also state that even within societies classes exist that may not move through the same life stages as other classes in the same society. Their main point is that "whatever passages persons do in fact experience will relate to their places within the larger social structure" (Clair et al., 1993, p.27).

Erickson and Martin (1984) agree with Erikson's life cycle theory but believe that it must be refined by also looking at the quality of the journey through the phases of life. According to Erickson and Martin, the way in which adults understand and resolve the challenges and issues at each stage needs to be discovered. This can be done through combining Erikson's theory with Jane Loevinger's structural theory of ego development, which "provides a life-span theory of qualitative differences in how people understand themselves and others" (Erickson & Martin, 1984, p. 163). The importance of this integration of theories is to enrich the conceptions of adult development.

Miller (1983) finds two weaknesses with Erikson's life cycle theory. The first, she believes, is that the theory is a "loose connection of observations,

empirical generalizations, and abstract theoretical claims" (Miller, 1983, p. 174). She believes Erikson's terms can be misleading because they do not have their usual meanings, which leads to a misunderstanding of the concepts. The second weakness Miller finds in Erikson's theory is that he doesn't explain how a child moves from stage to stage or how the issues are resolved within each stage.

Another critique of Erikson's theory relates to it's applicability to women. Ryff and Migdal (1984) state that his theory has been criticized for reflecting a male experience and a male perspective on development. One criticism is that women's roles are less centrally tied to chronological age than men's. Another criticism states that separation, individuation, and autonomy are more male-like characteristics, while women place more importance on attachments, intimacy, and relationships (Gillian cited in Ryff & Migdal, 1984). Life span theorists are also criticized for ignoring physiological factors, especially in women (Ryff & Migdal, 1984). Finally, it is also said that there have been few empirical investigations to test whether Erikson's model actually is or is not relevant for women. It is important to be aware of these criticisms when applying Erikson's theory.

F. The Importance of a Life Strengths Perspective

Using a strengths perspective means that a person appreciates the positive attributes and capabilities that others express and looks for ways in which the individual and his or her social resources can be developed and maintained (Weick, Rapp, Sullivan, & Kisthardt, 1989). The strengths perspective is an alternative to a preoccupation with negative aspects of people and society and a more apt expression of some of the deepest values of social

work. "In 1958, the Commission on Social Work Practice included as a main objective to the field to 'seek out, identify, and strengthen the maximum potential in individuals, groups and communities' (Bartlett, 1958, p. 6)" (Weick et al., 1989). A focus on individual or environmental deficits and personal or social problems is seen in current frameworks, instead of a concentration on strengths.

The words of Smalley (1967) show how the social work profession holds it's foundation in the development of people's strengths:

> The underlying purpose of all social work effort is to release human power in individuals for personal fulfillment and social good, and to release social power for the creation of the kinds of society, social institutions, and social policy which make self-realization most possible for all men [or women]. Two values which are primary in such purposes are respect for the worth and dignity of every individual and concern that he [or she] have the opportunity to realize his [or her] potential as an individually-fulfilled, socially contributive person (p.1) (cited in Weick et al., 1989).

In focusing on a person's strengths, the individual will be more likely to continue development along the lines of those strengths. Continuing growth occurs through the recognition and development of strengths. Emphasizing deficits has serious implications and limitations, but considerable advantages can be found when focusing on strengths (Cowger, 1994). The belief that people have the capacity to determine what is best for them and that people tend to do the best they can are principles that guide this focus on strengths. The goal is to determine what kind of life a person wants and then bring the available resources together to reach this goal. This takes the focus off of what problems one has had in life and instead looks at what can be done now. A heightened commitment to the belief that social work practice builds on a

person's talents, aspirations, wisdom, and courage justifies this approach (Weick et al., 1989).

Using the Life Strengths Interview Guide and life review with older adults are methods in which the strengths perspective is put to use. Working with older adults in using this perspective helps family members, case managers, social workers, and older clients come to know their life strengths and values. These strengths can be used to set up needed formal or informal services and activities that will best meet the older adults needs (Kivnick, 1993).

G. Older Adults as Volunteers

It is evident that older people receive a disproportionately small share of psychotherapeutic services (Maldonado, 1987; Minkler & Estes, 1991; Nagel, Newlin, & Cimbolic, 1988). This may be due to resistance of older people to seek help and of therapists to provide it, limitations of trained persons and available programs, or financial and transportation problems experienced by older people (Nagel et al., 1988). With only about 5 percent of the population age 65 and older in nursing homes at any given time (Stevens, Walsh, & Baldwin, 1993), many more frail elderly individuals rely on the informal services of relatives, friends, neighbors, and people in the community for social support. As the number of frail older adults increases, the role of active older adults as volunteers in working with this population will become more necessary.

Becker and Zarit (1978) state that the use of nonprofessional volunteers as counselors has been successful in a variety of settings that deliver mental health services. It has been shown that older volunteers make contributions in settings that work with mental health issues of the aging because they possess some of the personal qualities that are needed for effective counseling. These

authors state that from previous research it has been shown that there are three core therapeutic conditions in people that are associated with better client outcomes. These are accurate empathy, non-possessive warmth, and genuineness (Becker & Zarit, 1978). Some agencies have developed training programs to increase these skills in volunteers and professionals in order to better work with the needy aging population. For older adults, volunteering can be an opportunity for self improvement and learning. It also can provide them with a unique, meaningful, and responsible role using interpersonal abilities they have gathered as a result of life experiences (Becker & Zarit, 1978). Older volunteers who have had similar experiences as the clients may be at an advantage and be able to work better with these clients than a younger professional.

According to Nagel et al. (1988) several projects have been reported that focus on the important role of older adult volunteers extending services to their peers, and how both parties benefit. Peer volunteering can improve self-esteem and self-understanding in both parties and it has also been found to positively correlate with life satisfaction in older adults.

Blumenfield and Rocklin (1980) state that there are many older adults in the community who have retired and are rarely given the opportunity to be productive and useful. This can lead to alienation and depression. These adults are viewed by the authors as an untapped resource that may be able to meet the needs of other more frail seniors. These potential volunteers could use the experience to build upon their skills and talents.

Hyde (1988) suggests that social support is essential to the mental health of the elderly, and interventions are recommended to strengthen natural social networks. Studies have shown that when working to understand life satisfaction in the older population, it is the quality rather than the quantity of the

peer relationship that is significant (Hyde, 1988). Communication is seen as the key component of social support.

Peer counseling is defined as the use of active listening and problem-solving skills to counsel people who are our peers - peers in age, status, and knowledge (Scharlach, 1988). Scharlach (1988) discusses how older adult peer counselors have been shown to be effective in assisting older adults to cope with life transitions such as retirement and widowhood. Older peer counselors are provided with the opportunity to use their skills and life experiences to help other people in a meaningful way. Older volunteers should be viewed as a valuable resource providing professional skills and life experience to their work.

H. Volunteer Training With Older Adults

Bolton (1990) discusses factors that affect older adult education as being individual differences, life course, and cohort effects. Individual differences become more pronounced with advanced age which makes teaching older adults challenging and difficult (Bolton, 1990). Some of these differences may include learning styles, expectations for what is to be learned, and diversity in needs and wants. Bolton defines age cohorts as people born within a given five year period. He states that members of one age cohort may have had a very different life course than someone of another cohort. The life experiences of someone born in the early 1900s vary greatly from those experiences of someone born in the 1980s. For example, health status is a variable that can have important implications on learning and can vary depending to which age cohort a person belongs. For a person born in the early 1900s the life expectancy was 47 years (Bolton, 1990). The members of this age group today

have survived the critical health concerns of early life, but may experience a more diminished health status due to the many illnesses they were subject to than those who will be experiencing old age in the coming years. According to Bolton, *age* does not have much to do with how an older person learns. Older adults will probably vary in the ways in which they learn. It is stated that the ever-changing face of aging makes it nearly impossible to predict with any degree of accuracy, a given instructional model to fit a given learning event for a given age cohort (Bolton, 1990).

Courtenay (1989) raises several issues of importance about the design and implementation of educational programs for older adults. Some of the issues discussed include the need for society to adopt a life-span perspective of education in order to reverse the focus of learning on the young, the need for identifying the purpose of education for older adult learners, the need for identifying appropriate content for older persons, and the need to identify appropriate classroom environment (Courtenay, 1989). Another issue concerns instructional methods. Questions that need to be answered according to each learning experience in the context of purpose, content, and clientele are whether a group should be age segregated or age integrated and whether a class should use a case study approach for learning or lecture (Courtenay, 1989). It is suggested that there is no typical classroom environment or instructional method for older learners. For each of these issues, there does not seem to be any one easy answer about how to provide the most effective learning opportunity for older adults.

There are several methods of designing training programs for people, but there is limited research on training older adults in counseling their peers. Some unique techniques exist for trainings that are done with senior volunteers. The literature on this topic often focuses on specific training such as peer

counselor training for older adults, training for older volunteers to work in a nursing home setting, and training for volunteers working with blind people. Many of the techniques and ideas from these articles can be applied to the training sessions for this project. Training older adults to serve as peer volunteers requires specific attention to the characteristics of older adult learners.

Priddy and Knisely (1982) suggest considerations in the training of older adults to serve as counselors to their peers. The areas of discussion include setting training goals, providing follow-up training and supervision, and specific recommendations on conducting effective training, including group size, number and length of sessions, educational format, and leadership qualities. Basic principles of training described by the authors include maintaining sensitivity, flexibility and responsiveness to the needs of the peer volunteers and keeping in mind the needs of the clients with whom the peers will be working. Hoffman (1983) suggests that homework assignments and in-class practice of skills are important teaching techniques.

Priddy and Knisely (1982) discuss issues that they think should be mentioned and are of relevance when teaching the older population. The first is to unlearn old material. This is a relevant issue for this workshop because the goal is for the volunteers to become familiar with a new way of working with their clients, focusing on their past strengths rather than current problems. Second, the volunteer must use a nonjudgmental approach. This involves reminding the volunteer to provide support and assistance, not direction and evaluation. Third, the volunteer must understand the problem. Fourth, going through the training sessions, the volunteers will develop a sense of group cohesion and role identity, which is important if there is any sharing of feelings

involved. A good way for the trainer to acknowledge the group is with a certificate of completion for each participant at the end of the training.

It is also important that the volunteer have ongoing supervision. This can be done through individual or group methods. Individual meetings between the volunteer and the supervisor provides the one-on-one support the volunteer may need. The group setting can provide an opportunity for sharing, support, and advice, also group meetings can provide an arena for the discussion of problems and the sharing of gratifying experiences. New information can be given, practice methods can be discussed, and group solidarity can be maintained (Blumenfield & Rocklin, 1980). Supervision provided by a volunteer's supervisor should provide leadership, information, time and caring through understanding, interpreting, probing, evaluating, working with, conferring, collaborating , and guiding the volunteer (OASIS Volunteer Handbook, n.d.). Examples of how this can be done include providing effective feedback, taking time to express appreciation for the volunteers, providing good resources and equipment for their use, and providing occasions for volunteers to get together for informal sharing of their experiences.

Priddy and Knisely (1982) outline seven areas that should be considered in the guidelines for older adult volunteer training. These include training format, group size, number of sessions, length of sessions, leadership, materials, and facilities and are further discussed here:

Guidelines for Training

Format:

Providing an active learning experience is most effective in training older volunteers. Since this may seem threatening to some older learners who are more comfortable with a more traditional classroom approach it is important to

introduce new methods slowly and insure that the first experience is positive (Priddy & Knisely, 1982). Bolton (1990) advocates for "deschooling lifelong learning" (p.146). This idea assumes that most elderly cohorts did not have positive schooling experiences during their formative years so learning in old age should take place using alternative methods. It is important that the leaders are sensitive to the participants and minimize threat, and encourage model acceptance and positive feedback.

Because people learn in different ways, training should be set up to include a number of ways of getting the content across (Blumenfield & Rocklin, 1980). Lauffer and Gorodeszky (1977) describe three instructional approaches. These are presentations, problem-solving methods, and practice skill development. The types of presentations that will be helpful here are short lectures, demonstrations, films, slides, and video tapes. The type of problem solving method that will be used involves case study examples. Practice development skills are good for learning how tasks are performed. The types that will be used include role play, and sensitivity training through learning about their own beliefs and attitudes by reflecting on how they personally would answer the interview guide questions. It is also important for the initial session to be designed to create a bond between group members so sharing becomes easier.

Group size:

Larger groups (over 14 people) can result in time and energy lost in group management. The literature suggests that ten to twelve participants in a group seems to be the most manageable size.

The Number of Sessions:

The number of sessions to have depends on the specific goals of the training. Techniques such as role-playing can take up a lot of time but are a very important part of the training.

Length of Sessions:

The literature suggests sessions that run about two hours long are time enough to fully explore topics without a significant fatigue factor (Priddy & Knisely, 1982; Pell, 1977). Many of the trainings in the literature held sessions on a weekly basis so that information learned from previous sessions would not diminish.

Leadership:

It is important that the leader have a good knowledge of the topic being presented and also about the older adult learner. Co-leaders offer variety to the sessions and allow for more individualized attention to the participants. Cooperation, where the leader is not seen as professional with all the answers makes for a less stressful learning environment (Byers-Lang, 1984).

Materials:

Using a variety of learning materials can make learning more interesting, but they should be screened carefully before using. Videos, handouts, and overheads should be clear, and writing should be large enough for the older adult to read. If manuals are used it is important that they be well written and well organized. Adapted materials should be available for anyone who may have a seeing or hearing impairment. Participant feedback on the helpfulness and usefulness of the materials used is also important.

Facilities:

The site of the training should be well lit, comfortable and noise-free. Sitting in a circular format is a good arrangement for the participants so

everyone can see and hear everyone else. Blumenfield and Rocklin (1980) took into consideration physical comfort, an air of informality, openness, and a climate conducive to collaboration when setting up their training program. Ensuring accessibility to the training site and having transportation available if needed is also very important.

There are many things to take into consideration when developing a training program for older adults. In the creation of the Life Strengths Interview Guide Workshop a number of these suggestions were used in order to create an environment conducive to older adult learning.

III. WORKSHOP DESIGN

A. Description of Workshop

The Life Strengths Interview Guide Workshop is designed to be used with older adults who are currently involved in a volunteer program and already have had training about peer volunteering and experience in working with other older adults as clients. The function of this training workshop is to teach the volunteers how to discover the strengths that clients have through asking clients questions related to the stages of Erik Erikson's life cycle theory and focusing on life strengths. Through this type of life review, a person can distinguish his or her strengths and build on those strengths through current life situations.

The training is divided into four separate workshop sessions. The sessions will meet once a week and be two and one half hours long. Suggested times are from 9:30 a.m. to 12:00 noon or 1:00 p.m. to 3:30 p.m.

The training sessions will take place at a location that is easily accessible to the participants. Ideally, they will be at the volunteer agency itself, because many volunteers are familiar with or have been to the agency they volunteer for; and if they have not, this could be a time to get better aquainted with the agency. Transportation should be provided for those who need it.

B. Objectives of the Workshop

- To increase volunteers' skills in the areas of listening and interviewing

- To expand volunteers' knowledge of Erikson's life cycle theory

- To teach volunteers skills needed to use a Life Strengths Interview Guide

- To understand the importance of life review and a life strengths perspective

- To provide senior volunteers with knowledge about how to assess client strengths

- To practice discovering life strengths in clients

C. Format of Workshop

This workshop will be conducted in four sessions. Each session will be two and one half hours long. The format of each session will be the same.

The **first hour** will include:

- an overview of what will take place during the session

- lecture and learning of topic (to be implemented with overheads, handouts, and examples)

- discussion of examples (scenarios, case studies, and videos)

Break: 15 – 20 minute break including coffee, tea, water, snacks, and informal discussion.

The **second hour** will include:

- role playing in pairs — focus on skill building

- small and large group discussions and feedback

- questions and answers

- at home activity which is something that can be practiced before the

  next session

- evaluation of the session in written form

D. Outline for Training Curriculum

I. First Workshop Session: Introductions/Listening and Interviewing Skills

    A. Welcome
    B. Overview Of Total Workshop and This Session
    C. Introductions/Ice Breaker
    D. Presentation: Listening and Interviewing Skills (handouts and
       discussion)
    E. Break
    F. Listener Responses
    G. Skill Building (in pairs using listener responses)
    H. Discussion
    I. Attitude and Communication
    J. At Home Activity
    K. Session Evaluation

II. Second Workshop Session: Erikson's Life Cycle Theory

    A. Welcome
    B. Overview Of Today's Session
    C. Check In About The At Home Activity From Last Week
    D. Presentation: Erik Erikson's Life Cycle Theory
         - Erikson's Background
         - Life Cycle Chart (handout/overhead)
         - Life Stages (overheads)
    E. Break
    F. Role Play/Example
    G. At Home Activity
    H. Session Evaluation

III. Third Workshop Session: Introduction of the Life Strengths Interview Guide

A. Welcome
B. Overview Of Today's Session
C. Check In About At Home Activity From Last Week
D. Presentation: Life Strengths Interview Guide
    1. Life Review
    2. Strengths Perspective
    3. The Life Strengths Interview Guide
    4. Introduction
    5. Hope and Faith (video example)
    6. Willfulness, Independence, and Control
E. Break
F. Presentation (continued):
    7. Purposefulness, Pleasure, Imagination (video example)
    8. Competence and Hard Work
G. Skill Building
H. Discussion Of Skill Building
I. At Home Activity
J. Session Evaluation

IV. Fourth Workshop Session: Life Strengths Interview Guide

A. Welcome
B. Overview Of Today's Session
C. Check In About At Home Activity From Last Week
D. Presentation: Second Half Of The Life Strengths Interview Guide
    1. Values and Sense of Self
    2. Love and Friendship (role play)
    3. Care and Productivity (video example)
E. Break
F. Presentation (continued):
    4. Wisdom and Perspective (video example)
    5. Ending: Putting It All Together Again
G. Skill Building
H. Discussion Of Skill Building
I. Distribution Of Certificates Of Completion
J. Session Evaluation
K. Conclusion

Training Session #1

Introductions/Listening and Interviewing Skills

Objective:

- To increase volunteers' skills in the areas of listening and interviewing

Methods:

- Presentation by trainer
- Handouts and overheads
- Skill building — in pairs
- Group discussion

Materials:

- Name tags
- Markers
- Overhead projector
- Participant folders
- Flip chart
- Handouts: - Keys to Good Communication (Appendix A)
  - Ten Commandments for Good Listening (Appendix B)
  - Listener Responses (Appendix C)
  - Statements (Appendix D)
  - Life Strengths Interview Guide (Appendix E)
  - Evaluation: Session #1 (Appendix F)
- Overheads: - Listener Responses (Appendix C)

NOTES

1. Pass out name tags.
   Have marker available.

2. Be aware of "white noise", temperature of room, lighting, seating and arrangement.

3. Pass out folders to each person. Folders should contain: Outline of training curriculum, Life Strengths Interview Guide and note paper

4. Review outline

5. Answer any questions

6. Gather back together when this task seems completed

A. Welcome:
Introduce self to participants.
Make sure people are comfortable.
Inform participants that introduction of participants will be in "Ice Breaker" form after a brief overview.

B. Overview:
In this folder you will find an outline of the training curriculum and handouts we will be using throughout the training. Please be sure to bring this folder to each session. Take a look at the outline so you have a sense of what we'll be covering in each session. Today we'll be going over listening and interviewing skills.

C. Introductions/Ice Breaker:
Please divide up into pairs — preferably with someone you do not know very well. I would like you to interview each other and get the following information:
1. name
2. birth place
3. what they like most about spring.
Now, let's go around the circle and have everyone introduce their partner to the group.

NOTES

Presentation: Listening and Interview Skills

"Nearly half of our communication time is spent listening and we do not receive formal education in this area. We can speak approximately 125 words per minute but we can understand 400 words per minute. This allows us to process other information which can allow our mind to wander from the main source of incoming information.

The receiver is key in communication. Communication only occurs when the receiver actually "gets" the message being sent." [taken from: <u>Volunteer Respite Program Manual</u> (1993)]

7. Pass around handout titled "Keys to Good Communication" (Appendix A)

I'm passing around a handout on keys to good communication. When I read through this, think of yourself when you are with a client. Detailed examples of some of these concepts will be given later.

8. Read through handout

9. Pass around handout titled "Ten Commandments for Good Listening" (Appendix B)

This handout is the "Ten Commandments for Listening". Let's take turns reading it.

10. Have participants take turns reading the "Ten Commandments for Good Listening"

E. Break

11. Pass around handout titled "Listener Responses" (Appendix C)

F. Listener Responses:

"There are basically five ways you can respond to a speaker in order to understand and encourage the speaker to continue.

12. Go over "Listener Responses" using transparency

1. PASSIVE LISTENING lets the speaker know you are still "with" him or her.

2. DIALOGUE SUSTAINING responses are appropriate if a speaker seems to need reassurance that you are interested.

3. ECHOING is a restatement of speaker's expressed emotion using his or her own words.

NOTES

13. Pass around handout titled "Statements" (Appendix D)

14. Make sure partners have different questions from each other. (There are two different sheets)

15. Answer any questions the group may have about the types of responses and when to use them. Call attention to the responses and the way they allow the speaker to continue talking. [this section adapted from: Sinykin & Vineyard (1989)].

4. ACTIVE LISTENING is providing feedback on the emotion the speaker seems to be experiencing. Your feedback helps the person to get in touch with feelings and then to work without moralizing or trying to change the person.

5. PARAPHRASING is one way to check your understanding of the speaker's ideas. This is most appropriate when the speaker pauses and is waiting for you to comment." [taken from: Sinykin & Vineyard (1989)].

G. Skill Building:

For practice, let's get into pairs again. I'm going to pass a sheet to each of you with some statements on them. Take turns telling your partner a statement, then the other person will answer using one of the five listener responses. The person who made the statement should say what type of response they received. Then switch roles. You can use the "Listener Responses" handout sheet as a guide. This is to just get you use to recognizing the types of responses we give to each other.

Statements

1. I'd like to apply for that job at the clothing store, but I'm afraid they'll think I'm too old.
2. I used to really enjoy going for walks around the lake.
3. I feel safe living in this apartment building.
4. I love to cook pies and cakes for my friends.
5. I want my family to be with me when I die.

----

1. I'm glad I can spend more time on my hobbies these days.
2. It's hard for me to get around without my walker.
3. I get lonely living in this big house by myself.
4. I had a great trip going to Wisconsin with my son.
5. I am afraid of dying alone.

NOTES

16. Gather group back together for discussion

H. Discussion
Which listener responses were easiest to use?
Which listener responses were hardest to use?

17. The script in **Attitude and Communication** (pp. 43-44) is taken from:
Sinykin, J., & Vineyard,S. (1989) <u>Person to Person: Volunteer Recruitment and Training Manual.</u> (available from: St. Cloud Project CARE, P.O. Box 542, St. Cloud, MN 56302).

I. Attitude and Communication
To wrap up this session, I'd like to talk a bit about attitude and communication. "A good relationship between two people increases the chance for communication. You listen better if you care about the person who is speaking; also, you are inclined to be open and honest if a listener is responding with respect and understanding. Whether your relationship is personal or professional, communication is more likely to take place if you relate to the other person with empathy, respect, and authenticity.

Empathy: Empathy is recognizing another person's feelings. What are some ways that you can communicate empathy? (Responses may be undivided attention, nonverbal behavior, passive listening responses.)

18. Have a flip chart out to put up responses.

Respect: Respect, the second crucial ingredient in a good relationship, is the unconditional acceptance of another person's behavior, beliefs, opinions, and feelings. This is a "no strings attached" attitude; your continued regard is not based on the person meeting your standards of behavior or beliefs. Acceptance is not the same as agreement. You can disagree with someone and still accept that person's right to his or her own opinions.

Being accepting is sometimes hard to do. Most of us have prejudices, whether we are aware of them or not. You don't have to

NOTES

19. Again, put response on flip chart.

condone a person's lifestyle, beliefs or behavior, but you should respect his or her right to choose how to think and act. What are some ways in which we show respect? (Being empathic, nonjudgmental, don't criticize, be sincere.)

Acknowledging your client's strengths and abilities also shows respect. Your relationship should be a partnership with each of you contributing equally. Patronizing or dominating your client undermines this relationship. If all of your communication is to provide solutions and advice and to impose your own ideas, you belittle your client's ability to accept responsibility. Your respect motivates your client to seek answers to his or her own problem.

Authenticity: Being authentic means being natural, open, and nondefensive. However, it does not mean that you reveal all of your thoughts and feelings all of the time; those you do choose to express must be genuine. Sharing positive feelings with your client is almost always appropriate. Relating your personal experiences, when they are relevant to your client's problem, is another way to communicate authentically. Body language can also be effective in conveying your genuine care and concern. A pat on the back, a hug, or shaking hands may be an appropriate way to express your feelings if physical contact does not make your client uncomfortable.

Summary: Listening and responding with care and concern, respecting another person and effectively demonstrating that respect, and being genuine and sincere and conveying that are some of the basics to building a trusting relationship with a client, with a professional, in fact, with any other human being."

NOTES

20. Hand out Life Strengths Interview Guide (Appendix E)

21. Hand out Evaluation: Session #1 (Appendix F)

J. At Home Activity:
Before next week, look through questions on interview guide and think about how you might answer some of them for yourselves.

K. Session Evaluation:
Before we go, please fill out an evaluation form on this session.
The questions on the evaluation ask:
How would you rate the training?
How would you rate each of the following:
I. Welcome and Introduction
II. Ice Breaker
III. Handouts
IV. Small group exercise on listening
V. Attitude and Communication
Did the training session add to your knowledge and skill?
What did you like most in the session?
What did you like least in the session?
Any further comments/suggestions:

Training Session #2
Erikson's Life Cycle Theory

Objective:

•To expand volunteers' knowledge of Erik Erikson's life cycle theory

Methods:

•Presentation by trainer

•Handouts/overheads

•Group discussion

Materials:

•Overhead projector

•Handouts: - Erikson's Psychosocial Themes and Stages of Life (appendix G)

                - Evaluation: Session #2 (appendix P)

•Overheads: - Erikson's Psychosocial Themes and Stages of Life (appendix G)

                - Stage One (appendix H)

                - Stage Two (appendix I)

                - Stage Three (appendix J)

                - Stage Four (appendix K)

                - Stage Five (appendix L)

                - Stage Six (appendix M)

                - Stage Seven (appendix N)

                - Stage Eight (appendix O)

NOTES

1. Pass around name tags
   Take attendance

2. Ask: Has anyone heard of Erik Erikson? If so, what do you know about him? (Have small discussion)

3. Hand out chart of life cycle theory titled "Erikson's Psychosocial Themes and Stages of Life" (Appendix G)

4. Put up overhead of life cycle theory — point out opposing issues and how stages are set up. (Appendix G)

A. Welcome

B. Overview Of Today's Session:

Today we will be talking about Erik Erikson and the life cycle theory that he developed. We will go over the chart, look at examples using handouts, overheads, role playing in pairs and discussion.

C. Check In About The At Home Activity From Last Week:

Did anyone have a chance to look over the Life Strengths Interview Guide at home? How did people feel about asking themselves the questions from it?

D. Presentation:

Erik Erikson was a psychoanalyst from Europe in the early 1900's. He worked with may different universities and hospitals in the United States when he came here in the early 1930's. He then developed a life cycle theory that describes each stage in life that people go through (i.e. infancy, adolescence, adulthood), and what major components of development they face as they go through these stages.

The empty boxes don't represent anything here. At each stage there are two issues or "crises" that have possible positive and negative outcomes. Ideally, throughout life the positive aspects will dominate the negative ones and a healthy personality will be developed.

The issues faced in the stages of this chart aren't specifically age related. A person is continually trying to balance the opposing issues throughout life.

NOTES
5. Point out all cap words
(HOPE, WILL, PURPOSE)

6. Put up overhead titled
"Stage One" (Appendix H)

For example, identity is what a person strives for in adolescence, but many adults are still trying to develop a sense of identity.

The words in all capital letters are strength that emerge from the struggle between the other two.

We will go over the individual stages after the break.

Stage One
Infancy (about birth — one year old)

Opposing Issues: Trust vs. Mistrust

Emerging Strength: HOPE

Basic Trust: Basic trust is an attitude toward oneself and the world derived from the experiences of the first year of life. It is the first component of a healthy personality.

Trust: Trust is a reasonable trustfulness of others and a trustworthiness in oneself. Mothers and others in this role usually are the ones who create the child's sense of trust through feeding the child when hungry and comforting the child when frightened or hurting.

Mistrust: Mistrust is characterized in adulthood by becoming withdrawn, suspicious of others, and lacking self confidence.

HOPE: Hope is the most essential overall outlook on life, created by the balance of trust and mistrust. Hope is the basis of faith.

Relation To Old Age: As a person ages, an infant's trust is related to an older person's appreciation for human interdependence.

NOTES

7. Put up overhead titled "Stage Two" (Appendix I)

Stage Two
Early Childhood (about 2 – 3 years old)

Opposing Issues: Autonomy vs. Shame and Doubt

Emerging Strength: WILL

Autonomy: Autonomy is striving to become independent.

Shame/Doubt: Shame and doubt are feelings of being completely exposed, self-conscious, and not in control.

WILL: Will is the determination to exercise free choice as well as self-restraint.
It also is a sense of control over one's body, behavior, and life.

Relation To Old Age: An example of how a person can relate back to this stage in old age is by accepting body deterioration and confronting limitations.

8. Put up overhead titled "Stage Three" (Appendix J)

Stage Three
Play Age (about 4 – 5 years old)

Opposing Issues: Initiative vs. Guilt

Emerging Strength: PURPOSE

Initiative: Initiative is seen in forming and carrying out goals, intrusion, competition, and taking initiative. It may also be seen in physical attack, aggressive talking, vigorous locomotion, and curiousity.

Guilt: Guilt may show itself at this stage through immoral thoughts or behavior and by the fear of punishment.

PURPOSE: Having the courage to pursue goals without guilt taking over.

Relation To Old Age: Ways in which the Play Age Stage can be

NOTES

related back to in old age is through resiliency, empathy, and by having a sense of humor.

Stage Four
School Age (about age 6 – puberty)

Opposing Issues: Industry vs. Inferiority

9. Put up overhead titled "Stage Four" (Appendix K)

Emerging Strength: COMPETENCE

Industry: Industry is shown at this stage by success that brings feelings of competence, accomplishment, and mastery.

Inferiority: Inferiority shows up through a sense of inadequacy and ineptitude.

COMPETENCE: Competence is tha strength that arises in this stage through the free exercise of dexterity and intelligence in the completion of tasks, unimpaired by a threatening sense of inferiority.

Relation To Old Age: Youth's competence relates to humility in age.
Competence in old age is built on the integration of a lifetime of ability and inability.

Stage Five
Adolescence

10. Put up overhead titled "Stage Five" (Appendix L)

Opposing Issues: Identity vs. Confusion

Emerging Strength: FIDELITY

Identity: Identity is obtained through attaining confidence of inner sameness and continuity in the self. It involves having personal commitments to attitudes and beliefs and having activities and relationships that reflect these beliefs.

Confusion: Confusion arises when a person does not have a sense of identity.

FIDELITY: Fidelity is the ability to sustain loyalties freely pledged in spite of the

NOTES

inevitable contradictions of value systems and is only possible if identity is achieved.

Relation To Old Age: In old age, identity is defined in other ways than mastery and abstract knowledge. Identity is defined through feelings, intuitions, intimacy, tenderness, and coming to terms with love expressed and unexpressed during one's entire life.

11. Put up overhead titled "Stage Six" (Appendix M)

Stage Six
Young Adulthood

Opposing Issues: Intimacy vs. Isolation

Emerging Strength: LOVE

Intimacy: Intimacy involves close associations and commitments with the opposite sex, same sex, and oneself.

Isolation: Isolation involves social relationships that are stereotyped, cold, and empty.

LOVE: Love is a strength that evolves with success in intimacy with self and others.

Relation To Old Age: The issues from young adulthood are reviewed in old age by coming to terms with love, expressed and not expressed, over the course of a whole life cycle.

12. Put up overhead titled "Stage Seven" (Appendix N)

Stage Seven
Middle Adulthood

Opposing Issues: Generativity vs. Stagnation

Emerging Strength: CARE

Generativity: Generativity involves interest in establishing and guiding the next generation through child rearing or creative and productive endeavors. The experiences of caring, nurturing, and maintaining are also part of generativity.

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Stagnation: Stagnation is self-indulgence, boredom, and a lack of psychological growth.

CARE: The emerging strength of care involves the concern for what has been generated by love and necessity and also involves attending to all that has been generated.

Relation To Old Age: Caring for other should be maintained throughout old age and along with it the older person may be required to accept care from others.

13. Put up overhead titled "Stage Eight" (Appendix O)

Stage Eight
Late Adulthood

Opposing Issues: Integrity vs. Despair

Emerging Strength: WISDOM

Integrity: Integrity involves an accepting of the limitations that late life can bring and having a sense of being a part of a larger history that includes previous generations. It invovles striving for order and meaning of one's life.

Despair: Despair involves regret for what one has done or not done with one's life, fear of approaching death, and not accepting oneself. Feelings of dread and hopelessness may also arise.

WISDOM: Detached concern with life itself, in the face of death itself.

E. Break

14. The break may occur earlier if needed. Just break up the presentation of the stages.

Not everyone agrees with Erikson's life cycle theory. It has been argued that the theory is based on the white male experience and that it isn't applicable to women or people of other cultures. Others don't like it because they think the terms are hard to grasp. It is important to be aware of these critiques and know that this theory is not agreed on by everyone.

NOTES

F. Role Play/Example:

Now let's break into pairs.

Each pair will take a stage in life (or two depending on the number of participants) and think examples of how people demonstrate the opposing issues in their lives, either at the age they are when they are going through the stage or in old age (think of your clients).

For example, in the second stage, early childhood, the areas of the personality that are developing are autonomy on the positive side, and shame/doubt on the negative side. In childhood, autonomy might be shown by a two year old insisting she button every button on her shirt by herself, making her mother late for work...and the next day the child has a tantrum in the morning because her mother hasn't helped her get dressed. The child is showing autonomy on the one side, doubt on the other. Gradually feeling a sense of autonomy in this stage, and then throughout life leads to having a sense of wilfullness, independence and control. In old age, dependence on others for help can enter our lives again. For example, an older client who has to depend on a spouse or caregiver to make his meals loses the independence of eating when he wants to. His sense of autonomy may be portrayed in deciding what he would like to eat, feeding himself, or helping to make out the grocery list.

You can use the outline from the overheads for the stage you have and brainstorm with your partner for examples in the stages.

When we are done we will share an example from each stage with the group. If an example can't be thought of, the group maybe can think of one together. This exercise is to get a feel for applying the theory to real life situations.

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15. Hand out Evaluation:
Session #2 (Appendix P)

G. At Home Activity:
In the next week, ask a family member or someone close to you some of the questions off the Life Strengths Interview Guide (spouse, child, friend, etc.).

H. Session Evaluation:
Before you go, please fill out the evaluation form for this session.
The questions on the evaluation ask: How would you rate the training of this session?
How would you rate each of the following:
I. Review/Discussion of homework
II. Presentation of Erikson
III. Small group exercise
Did the training session add to your knowledge and skill?
What did you like most about this session?
What did you like least about this session?
Any further comments/suggestions:

Training Session #3

Introduction to Life Strengths and the Interview Guide

Objectives:

- To understand the importance of life review and a life strengths perspective

- To teach volunteers skills needed to use a Life Strengths Interview Guide

Methods:

- Presentation by trainer

- Handouts/Overheads

- Role play in pairs

- Video Examples

- Group Discussion

Materials:

- Handouts: - Have Life Strengths Interview Guide available

  - Evaluation: Session #3 (Appendix W)

- Overheads: - Strengths Perspective (Appendix Q)

  - Sections of Life Strengths Interview Guide:

    - Introduction (Appendix R)

    - Hope and Faith (Appendix S)

    - Willfulness, Independence, and Control (Appendix T)

    - Purposefulness, Pleasure, and Imagination (Appendix U)

    - Competence and Hard Work (Appendix V)

- Videos: - Hope and Faith (Segment One) (Strom, 1995)
  - Purposefulness, Pleasure, and Imagination (Segment Two) (Strom, 1995)

- TV/VCR

NOTES

1. Name tags, optional

2. Make sure everyone brought their guide. Have extras available.

A. Welcome

B. Overview Of Today's Session:
Today the focus is on the Life Strengths Interview Guide that was given to you the first session.

First we will talk about the importance of life review and what this means, and also the reasons why it is important to see people's strengths.

We then will talk about the interview guide and how it was developed, and how it is related to Erikson's theory. We will go through the first half of the guide today, and finish going through it next week. A video will be shown with some examples. Also today, we will ask each other some of the questions from the guide and discuss how it went.

We will have time at the end for questions and also fill out another evaluation for this session.

3. Discuss how this went for people

C. Check In About The At Home Activity From Last Week:
First off, did anyone have a chance to ask a family member or friend questions from the guide?
- How did it go?
- How did you feel?

4. Have a flip chart and write down what people think of.

D. Presentation:
1. Life Review
When you hear the term "life review" what do you think of? (write down people's comments)
Some examples (if they haven't been said) are:
- reminiscing about the past — could be good events or about conflicts
- storytelling — writing down the things that you think about
- autobiography — writing down your life story

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- <u>workshops</u> on life review
- <u>one-on-one conversations</u> with family, friends, practitioners

All of these things encompass the idea of taking a look back on one's life, reviewing where they've come from, and getting a sense of who they are. Life review can bring up positive and/or negative feelings in a person.

<u>Positive:</u> Reviewing one's life may bring on feelings of success, accomplishment, a feeling one has done his or her best, etc. It also may inspire someone to right an old wrong or make up with an enemy.

<u>Negative:</u> Life review may cause the person to feel like he/she has not accomplished what was hoped in life or may bring on feelings of despair, guilt, or depression. Helping a person to focus on strengths may assist them to look at life differently.

2. Strengths Perspective

5. Put up overhead of titled "A Strengths Perspective" (Appendix Q)

Using a strengths perspective when working with clients guides us to look at the positive attributes and capabilities that the person expresses.

6. Go over overhead

Having a strengths perspective includes:
• looking for positive attributes and capabilities
• looking at gains the person has made in life
• looking for talents, abilities, capacities, skills resources, aspirations
(all people possess a wide range of these)
• looking for what kind of life the person wants (what resources are needed to help now)

When you are with your clients, you may feel that a lot of attention is paid to their problems, losses, etc. It is important to acknowledge these losses and problems, but it is just as important to know what strengths and values your client has.

NOTES

7. Have participants take the Life Strengths Interview Guide from their folders

3. The Life Strengths Interview Guide

This guide was developed by Dr. Helen Kivnick, a social work professor at the University of Minnesota and was developed to be used with older adults. It consists of a series of questions that are related to the stage of Erik Erikson's life cycle theory. The guide was intended to be used by family members, social workers, or anyone who has regular contact with an elderly person (that would be you). Its purpose is to help you and the older person themselves, discover his or her strengths and values and apply them to their life today. Let's look at the guide and go through the questions.

A way you might approach a client before you start asking these questions could be to say that the two of you have spent a lot of time talking about the person's troubles, but you would like to know more about the strengths, values, beliefs and history of your client as well. This can be done by asking some specific questions.

8. Put up overhead titled "Introduction" (Appendix R)

9. Read through questions and probes. Ask participants if anyone wants to share answers they have thought of for themselves.

4. Introduction:
What is it about your life:
...that is most worth living for?
...that makes you feel most alive?
...that makes you feel most like yourself?

<u>**NOTES**</u>

10. Put up overhead titled "Hope and Faith" (Appendix S)

11. Show video example: Segment one (See Appendix GG for summary)

12. Put up overhead titled "Willfulness, Independence, and Control" (Appendix T)

5. Hope and Faith:

The first section focuses on hope and faith and relates to Erikson's infancy stage of trust vs. mistrust.

The questions are:
•What is it in your life that gives you hope?
•How do moral beliefs and values fit into your life?
•How have they fit in earlier times?
•What is your religious affiliation?
•What about religion is most important to you?
•How do you like to express your religious beliefs?
•Is religion something you practice in private?
•Is some group religious activity important to you?
•What is it in your life that gives you a sense of security?
•What do you tell yourself or think about when you're afraid and you need to believe that things will be all right?

These questions focus a lot on the religious background of the person. By asking these questions it can be determined whether this area is or was an important part of the older persons life and if so are they applying it in any way to their life today?

Discuss video example
- Can anyone think of any other examples?
Ask participants if they have any questions.

6. Willfulness, Independence, and Control:

The questions on the second section of the guide focus on willfulness, independence, and control. These questions relate to Erikson's early childhood stage dealing with autonomy and shame/doubt.

The questions are (read through questions):
• How is your health these days?
• Do you:
...have any physical limitations?
...have any disease or conditions for which you're being treated?
...take medications?

NOTES

...rely on aids such as glasses, hearing aid, cane/walker/wheelchair, etc.?
...rely on assistance with homemaking, personal care, etc.?
• What part of your life is most important that *you* stay in charge of?
What kinds of control are easier to give up, as long as you remain in charge of what's really important?
• What do you think might make it easier to accept help, when you wish you didn't need help in the first place?
• What is it that has always given you confidence in yourself?
• What kind of decisions are absolutely most important that you make for yourself?
• What kinds of decisions are you willing to have someone else make for you? Who?

These questions focus on health issues and living situations that may affect how much independence and control a person has in life.

Many of you probably already know about the health condition of your clients. When a client starts discussing these issues, try asking "What part of your life is most important that you stay in charge of?" or "What kinds of independence would you find especially painful to give up?"
(e.g. daily routine, living in own home, medical treatment, money issues). Changing the conversation to focus on these issues will help you and your client discover strengths rather than focus on current health problems.

Can anyone think of any other examples?
Ask participants if they have any questions

E. Break

NOTES

13. Put up overhead titled "Purposefulness, Pleasure, and Imagination" (Appendix U)

F. Presentation (contintued):
7. Purposefulness, Pleasure, and Immagination:

The third part of the interview guide is made up of questions that focus on purposefulness, pleasure, and imagination. These questions are related to the play age of Erikson's theory and focus on the balancing of initiative vs. guilt.

The questions are:
• What kinds of things do you enjoy doing?
• What kinds of activities give you pleasure?
• What kinds of activities have always given you pleasure?
• What do you do for fun these days?
• What would you do for fun if you could do anything in the world?
• What have you done, in your life, that makes you proudest?
• What is there that you've always been curious about?
• What do you want to do, most of all, with the rest of your life?

This section focuses on important activities of the past and present for the older person.

I have a video example of the questions from this section.

14. Show vidoeo example: Segment two (See Appendix HH for summary)

Discuss video example:
Can anyone think of other examples?

Any questions?

15. Put up overhead on "Competence and Hardwork" (Appendix V)

8. Competence and Hard Work:
The fourth area of the interview guide focuses on competence and hard work. This relates to Erikson's school age stage and the balancing of industry vs. inferiority.

The questions are:
• What have you worked hard at?
• What would you like to be working at now, if you were able?
• What kinds of things have you always been good at?

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• What kinds of things are you good at now?
• What skills do you have? Or areas of expertise?
• What is there that you've always wanted to learn, but never quite gotten around to?
• What do you wish you could do better?
• Would you find it easier to accept assistance if you could trade some skill or activity in return?

These questions are trying to discover professional and/or personal skills the older person has. Once these are discovered, they may be somehow incorporated into the person's life today.

An example would be:
You have a client who has worked hard all of her life in a variety of jobs with her husband. When asked what types of activities give her pleasure in life (previous section), she doesn't respond. When asked what she has worked hard at in life, she lists the many hard jobs and long hours she worked in her various jobs throughout life. Did any of this work give her pleasure? The answer was yes. When asked, "What would you like to be working at now, if you were able?" She said she would be a nursing assistant again, she really loved that job. After talking about what it was specifically she liked about that job, she decided that she might like to volunteer in a nursing home now in some way. She's 83 years old.

Can anyone think of any other examples?

Ask participants if they have any questions.

NOTES
16. Divide group into pairs

17. Get participants back into large group

18. Pass out Evaluation: Life Strengths Workshop Session #3 (Appendix W)

G. Skill Building
Now, let's get into pairs and ask each other some of the questions we've just gone over.

H. Discussion Of Skill Building:
How did people feel <u>asking</u> the questions?

How did people feel <u>answering</u> the questions?
What questions were easy for you to answer?
What questions were hard?

Next week we will go over the rest of the questions in the interview guide.

I. At Home Activity:
If you meet with a client before our next session, ask him/her a question or two and see how it goes.

J. Session Evaluation:
Before you go, please fill out the evaluation for this session.
The questions on the evaluation ask:
How would you rate the training of this session?
How would you rate each of the following:
I. Structure of Session
II. Learning about Life Review
III. Learning about a Strengths Perspective
IV. The Life Strenghts Interview Guide
V. Video Segments
VI. Skill Building
Did the training session add to your knowledge and skill?
What did you like most about this session?
What did you like least about this session?
Any further comments/suggestions:

Training Session #4

Second Half of Life Strengths Interview Guide

Objectives:

- To provide senior volunteers with knowledge about how to assess client strengths.

- To practice discovering life strengths in clients.

Methods:

- Presentation by trainer

- Handouts/Overheads

- Video examples

- Role play in pairs

- Group Discussion

Materials:

- Handouts: - Have Life Strengths Interview Guide available
  - Certificate of Completion filled out for each participant (appendix CC)
  - Evaluation: Session # 4 (appendix DD)

- Overheads: - Sections of Life Strengths Interview Guide:
  - Values and Sense of Self (appendix X)
  - Love and Friendship (appendix Y)
  - Care and Productivity (appendix Z)
  - Wisdom and Perspective (appendix AA)
  - Putting It All Together Again (appendix BB)

- TV/VCR

- Videos: - Care and Productivity (Segment Three) (Strom, 1995)
  - Wisdom and Perspetive (Segment Four) (Strom, 1995)

NOTES

1. Make sure everyone has an interview guide. Have extras on hand.

2. Put up overhead titled "Values and Sense of Self" (Appendix X)

A. Welcome

B. Overview Of Today's Session

Today we will focus on the second half of the Life Strengths Interview Guide. There are four sections and a conclusion. We will go through all of the questions, look at some video examples, and ask each other questions in pairs. We will leave time at the end for discussion and a final evaluation.

C. Check In About At Home Activity From Last Week:

Did anyone have a chance to ask a client one of the questions out of the guide? If so, would you like to share a little bit about the experience?

D. Presentation:

Let's start where we left off last week in the Life Strengths Interview Guide:

1. Values and Sense of Self:

The fifth section focuses on values and a sense of self. This section relates to Erikson's adolescence stage of identity vs. confusion.

The questions are:
• What is it about life that makes you feel most like yourself?
• Why do you think this activity or belief or relationship makes you feel this way?
• What do you believe in?
• Do you have a philosophy of life that has guided the way you live your life?
• That guides your life today?
• What kind of person would you say:
...you are?
...you have always been?
• What is the image that you carry around inside, about who you are in the world?
• When people describe you, what do they say?
• What would you like them to say?

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An example of using questions from this section with a client would be of an 83 year old client who had a job on the side most of his life doing stand up acts in clubs around the country. He had a philosophy of enjoying every moment possible in life. Telling jokes and kidding around with people made him feel most like himself. The image that he carries around inside about himself is that he is an entertainer who believes the world is full of interesting and wonderful people. When people describe him, they say he is a joker and that he sneaks in one-liners into a conversation whenever he can. He is very "young at heart". As this client ages, he finds himself feeling lonely in a community where he doesn't fit in. He feels isolated because he can't drive much anymore and his family is too busy to spend any significant amount of time with him. He holds on to the image of being a pretty funny and entertaining guy, and acts this way with whoever he comes in contact with, whether it be a store clerk, bank teller, or a social worker helping him apply for food stamps.

Can anyone think of any other examples of how these questions might be answered?

Ask participants if they have any questions about this section.

3. Put up overhead titled "Love and Friendship" (Appendix Y)

2. Love and Friendship:
The sixth section looks at love and friendship in a person's life. This section relates to Erikson's young adulthood stage that focuses on intimacy and isolation.

The questions are:
• Who is important to you in your life today?
• Where do they live?
• Whom do you count on these days?
• Who counts on you?
• Whom do you have contact with these days?
• Who, among these, are people you contact by choice?
• Tell me about someone you've loved at some point in your life.

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• Can you tell me about:
...your marriage?
...your best friend?
• What do the people who know you best like most about you?
• What do they respect most in you?
• Who, in which relationships, has brought out the best in you?
• How do you feel about being alone these days?

These questions focus on asking about the people that the person is closest to today and in the past. Many of you may have clients whose spouses have died and now they are living alone. Do any of you have clients who like to talk about their marriage or spouse? Often times clients have family pictures up around the house — inquiring about a specific picture might be a good way to start this conversation. If their spouse has died, you could follow up this conversation with the question, "How do you feel about being alone these days?"

4. Do role playing in pairs

Let's get into pairs and ask each other questions from this section.

Does anyone have any other examples or question related to these questions?

5. Put up overhead titled "Care and Productivity" (Appendix Z)

3. Care and Productivity:
The seventh section is on care and productivity. It relates to Erikson's adulthood stage that balance generativity and self absorption.

The questions are:
• Whom or what do you especially care about?
• How do you show your caring?
• Who is there that you lean on, these days?
• Who leans on you?
• Who is there, that it's important to you to be good for? Or to be nice to? Or to set a good example for?
• What is there about yourself and your life that you want to make sure people remember?

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• Who and what have you cared about over the years?
• Whom have you cared for? Take care of? Tell me about them.
• What's the most important thing for you to do with your life these days?
• Who is the person who makes you think, "This is the one who will carry on for me when I'm gone"?

This section looks at who or what the person cares about now or has cared about over the years.

6. Show video example: Segment Three (See Appendix II for summary)

Discuss video example

Does anyone have any other examples or questions about this section?

E. Break

F. Presentation (continued):

7. Put up overhead titled "Wisdom and Perspective" (Appendix AA)

4. Wisdom and Perspective:
The eighth section of the guide is on wisdom and perspective. This relates to Erikson's old age stage of balancing integrity vs. despair.

The questions are:
• What is there about your life that you wish had been different?
• What is there that you're struggling to make sense of, about the world?
• What has been most meaningful about your life so far?
• How do you deal with disappointment? How do you experience joy?
• What strategies have you used for coping with fear?
• Let's talk a bit about death:
...your own death?
...how you'd like to die?
...where you'd like to die?
...who should be there with you?
...anything you'd want to be sure and get done first?
...anything you'd want to be sure to say to anyone first?

NOTES

...who should take what kinds of measures to prolong your life?
• Have these thoughts changed over the years?
• Are you afraid of dying?
• Do you know what you're afraid of?
• Do you have any ideas a bout what might help you be less afraid?

Many of these questions surround the idea of death. This isn't always an easy subject to talk about, but the purpose here is to get an idea about where the client is at.

8. Show video example: Segment Four (See Appendix JJ for summary)

Discuss video example

Does anyone have any other examples or questions related to this section?

9. Put up overhead. titled "Putting it all together Again" (Appendix BB)

5. Ending: Putting It All Together Again
This concluding set of questions are the same three that appear in the introduction.
• What is it about your life today that:
...makes you feel most alive?
...is most worth living for?
...makes you feel most like yourself?
I'd like you to think back over your whole life. Over everything you've seen and everything that's happened to you. And I'd like you to tell me a story about something in your life. Anything. But a story from your life that is somehow meaningful for you.

The end of the guide asks the client to tell a meaningful story from their life.

G. Skill Building:
Now, let's try this last exercise. Break up into pairs and share with each other a meaningful story from your life.

10. Gather people back together when they seem finished

H. Discussion Of Skill Building:
Ask if anyone would like to share the story they told to their partner.
When a person tells their story, ask the participants to point out strengths that they thought the story revealed about the person.

11. Do this exercise with as many people who want to participate, or as time allows.

NOTES

12. Be sure to leave enough time at the end for closure, handing out certificates and completing evaluations.

13. Have Certificates of Completion filled out for each participant (Appendix CC)

14. Hand out Session #4 Evaluation: (Appendix DD)

15. A copy of the Three Month Evaluation and cover letter can be found in (Appendices EE and FF).

I. Distribution Of Certificates Of Completion

J. Session Evaluation:
Please fill out the evaluation for this session.
The questions on the evaluation ask:
How would you rate the training of this session?
How would you rate each of the following:
I. Structure of session
II. Life Strengths Interview Guide
III. Video segments
IV. Sharing stories
Did the training session add to your knowledge and skill?
What did you like most about this session?
What did you like least about this session?
Any further comments/suggestions:

K. Conclusion:
Now that we have gone over and practiced using this guide, use pieces of it that you feel are appropriate with your clients. If you have questions please call me. We can discuss how things are going with it. I will be asking you to fill out an evaluation in about three months to see how useful this guide has been with your clients, and to get feedback from you after you've had a chance to get more familiar with it.

IV. LIMITATIONS

Due to time and other constraints, this workshop has not yet been implemented to test its feasibility. Topics of further research may be obtained after the workshop has been put into practice, the volunteers have had a chance to use the guide with their clients, and evaluation of its effectiveness has taken place. There are a variety of questions that arise concerning some logistics of the workshop itself such as: Will the content of each session get covered in the amount of time given? Is the content too academic or theoretical for its participants? Is there enough or too much variety in the way topics are presented? Would the workshop benefit from having more than one presenter?

Another area that brings up questions is the evaluation aspect of the workshop. Participant evaluation is necessary in order to receive valuable feedback on how to improve each workshop session and the workshop as a whole. What is the best way to obtain this information? Perhaps the workshop would benefit by asking the clients how they felt about being asked questions from the Life Strengths Interview Guide.   According to the literature (Bolton, 1990; Courtenay, 1989), the answers to all of these questions will vary depending on the interests and experiences of each participant.

Erikson's life cycle theory proved to be the most well-known model among the life-span theorists. Despite its popularity, there are some questions raised concerning its applicability to all cultures and societies. Some authors allude to the idea that Erikson's theory is based on the white male experience (Friedan, 1993; Rosel, 1988; Ryff & Migdal, 1984) and there is not much discussion of how the theory applies to other cultures who may not recognize each of Erikson's stages in life. Kivnick (1993) addresses this issue by pointing out that behavioral and attitudinal expressions of any of the eight stages in

Erikson's theory may be quite different in a cultural setting other than that of mainstream America. Hard work, perseverance, self-discipline, learning, and employment, for example, are popular ways that mainstream Americans today express behavior in relation to the stage of Industry and Inferiority (Kivnick, 1993). In a different cultural setting, behaviors and attitudes related to this same stage may be quite different. When using the Life Strengths Interview Guide with clients, it would be beneficial if the interviewer has the same cultural background as the client, or at least has an awareness of the typical behavioral and attitudinal expressions in relation to each stage in life according to the client's cultural background.

V. IMPLICATIONS FOR FURTHER RESEARCH

Many topics that represent the theoretical and conceptual framework for this project were discussed in the literature review. Each of these topics including the current views of the older population, life review with older adults, aging theories, Erikson's theory, the strengths perspective, and older adult volunteering and training could be taken separately and expanded on more fully in the workshop format.

This workshop was designed for use with older adult volunteers working with the more frail members from the same generation. Many other groups who work with older adults could benefit from this type of workshop. This workshop could be adapted and used with groups such as social workers, family members of older adults, and staff members of long term care facilities.

The Life Strengths Interview Guide was intended for use with older adults, but the concepts and questions are worth going over in any stage of life. Social workers working with other populations such as people with mental

illness could benefit by using the general information presented in this workshop with their particular client population.

Another area that could be looked into further involves the use of educational videos. The video used in this workshop was created by this author and is intended to show the participants examples of how the interview guide is actually used. The interviewers in the video are young adults and the clients are an active couple in their mid-80s. They are not actually involved in a social service agency. A few improvement ideas for future creations of similar educational videos may include: 1) the use of interviewers who are peers with the clients, 2) the use of clients who are actually in need of volunteers, and 3) the use of right and wrong examples of how to use the interview guide. For example, with this workshop it would have perhaps been more useful to have video examples of older adults as the interviewers with clients they are visiting in the community who may be isolated or have physical limitations. When using video examples for participants who are social workers, it would be beneficial to have examples using social workers in similar situations as the interviewers.

VI. CONCLUSION

This project looked at older adults in relation to current views, life review, theories, and volunteering. A review of the literature showed the importance of reviewing life in old age from a strengths perspective and how this can be related to Erik Erikson's life cycle theory. A workshop was then developed to provide older adult volunteers with knowledge on listening and interviewing skills, Erikson's life cycle theory, and the Life Strengths Interview Guide.

Working with older adults from a perspective of strengths links the social work model of the strengths perspective (Cowger, 1994; Weick et al., 1989) and

Kivnick's (1993) Life Strengths Interview Guide. Taking the focus off of older people's losses and deficits and bringing out strengths recognized through the values, activities, interests, and relationships held throughout life promotes positive mental health and empowerment to the older population (Kivnick, 1993).

The thought of aging often brings to mind the many losses that a person may experience. While it is not unusual to experience losses as one ages, the strengths that a person has should not be ignored. Through actively reviewing life, and discovering and acknowledging the people and things in life that make life worth living, an older person can experience a more vital and fulfilling existence.

APPENDICES

KEYS TO GOOD COMMUNICATION

Self Awareness

To be self aware is to know what you want to say and what you hope to gain from saying it. Here are some questions to ask yourself. The more you can answer, the clearer your message will be.

A.   Focus on the Specific Topic
1. What issue or situation am I talking about?
2. Who is/was involved?
3. When and where did this or will this take place?

B.   Focus on the Pieces of Information
1. What did I see?
2. What did I hear?
3. What were my thoughts based on what I saw and heard?
4. What feelings did I have?
5. What would I like?
6. What action can be taken?

Sending a Message

1. Ask yourself: "What picture am I trying to convey?" "What do I want the other person to see?"
2. Organize and Clarify your picture.
3. Choose few and simple words to use.
4. Develop one idea at a time.
5. Repeat key ideas and/or use analogies or examples.
6. Relate new ideas to old ideas.
7. Focus on essential aspects of the message so that the message is not lost in detail.
8. Be sure that you convey to the listener that what you are saying has value.
9. Use words that fit the frame of reference of the person you are speaking to.
10. Re-phrase your message when you feel this would make it more clear or confirm what you have said.
11. Ask the person to repeat back to you what you said.
12. It's your responsibility to go the extra mile to be understood.

Active Listening

1. An active listener does not respond with his/her own idea or opinion, but reflects back to the sender what they hear being said.
2. Some things to listen for are: the speaker's feelings, values, attitudes, judgments, and needs.
3. Be aware of the speaker's body language, facial expressions and voice tone.
4. Try to understand the other's viewpoint without necessarily agreeing with it.
5. Know something about the other person's viewpoint and values.

6. Realize that it is all right for someone to think and feel differently than you do. Strive to understand agreement is not important.
7. Ask questions to clarify.
8. Give feedback to confirm understanding.
9. Give your full attention to the speaker.
10. When a person is angry, it is best to let them speak without taking it personally.

Blocks to Listening
1. Comparing: "I've had it harder than you; I could do it better."
2. Mind Reading: Trying to figure out what the other person is really thinking and feeling. Making assumptions about how people react to you.
3. Rehearsing: You don't have time to listen because you are busy rehearsing what to say. Whole attention is on the preparation of your next comment.
4. Filtering: You pay half attention to see if someone is angry or upset then let your mind wander.
5. Judging: You jump to conclusions about the other person and/or what they are saying. Decide they are stupid or wrong without giving them a chance.
6. Dreaming: You half listen and sometimes the person says something that triggers a chain of private associations. Everyone dreams sometimes, but if you dream a lot with certain people, it may indicate a lack of commitment to knowing or appreciating them.
7. Identifying: You take everything a person tells you and refer it back to your own experience. You then see it from your past rather than theirs. This can lead to such statements as, "'I know just how you feel" "I had the same thing happen to me"
8. Advising: You are the great problem-solver ready with help and suggestions. You begin to search for the right advice even after hearing only a few sentences.
9. Sparring: Arguing and debating with people — often using put-downs and sarcasm.
10. Being "Right": You go to any lengths to avoid being wrong. You can't listen to criticism — you can't be corrected — and can't take suggestions to change.
11. Derailing: Changing the subject or joking it off because you find it uncomfortable and don't want to talk about it.
12. Placating: You want people to like you so you always try to please and agree with everything.

APPENDIX B

TEN COMMANDMENTS FOR GOOD LISTENING

1. Stop talking. You cannot listen when you are talking.

2. Put the talker at ease. Help them feel that they are free to talk.

3. Show others you want to listen. Look and act interested. Don't busy yourself with other tasks while the other person is talking to you. Listen to understand, rather than to oppose.

4. Remove distractions. Don't doodle, tap your pencil or shuffle papers. Would it be quieter to shut the door?

5. Empathize with others. Try to put yourself in their place so you may see their point of view.

6. Be patient. Allow plenty of time. Do not interrupt. Don't start for the door, walk away or check your watch.

7. Hold your temper. An angry person gets the wrong meaning from words.

8. Go easy on argument and criticism. This puts others on the defensive. They may "clam up" or get angry. Do not argue: even when you win you lose.

9. Ask questions. This is encouraging and shows you are listening. It helps to develop points further and is essential for clarification.

10. Stop talking! This is the first and last, because all other commandments depend on it. You simply cannot be a good listener while you are talking.

APPENDIX C

Listener Responses

Passive Listening

1. Nonverbal signals
   a. head nodding
   b. smiling
   c. leaning forward

2. Verbal signals
   a. "I see"
   b. "really"
   c. "yes"
   d. "mm-hmm"

Dialogue Sustaining

Respond with "I'd like to hear more about that" or say "and" or "but"
using a questioning inflection to encourage the speaker to continue.
Speaker: I was planning to go to the doctor...
Listener: but?
Speaker: But I don't have a way to get there

Echoing

Restate what the speaker has said using the speaker's own words.
Speaker: I feel scared when I meet new people. Everyone stares at me.
Listener: You feel scared when you meet new people and they stare at
you.

Active Listening

Describe the emotion the speaker seems to be experiencing. Lead-in
phrases to use are: "You seem to really feel _____."
"It sounds as if you feel _____ right now."
Speaker: Everybody tells me what to do. I wish I could do what I want.
Listener: I gather you are pretty irritated right now.

Paraphrasing

Restate what the speaker has said using your own words.
Speaker: No matter what I do my daughter puts me down. I guess I can't
do anything right!
Listener: Am I getting this right? You feel that nothing you do pleases your
daughter.

APPENDIX D

Statements

1. I'd like to apply for that job at the grocery store,
   but I'm afraid they'll think I'm too old.

2. I used to really enjoy going for walks around the lake.

3. I feel safe living in this apartment building.

4. I love to cook pies and cakes for my friends.

5. I want my family to be with me when I die.

---

1. I'm glad I can spend more time on my hobbies these days.

2. It's hard for me to get around without my walker.

3. I get lonely living in this big house by myself.

4. I had a great trip going to Wisconsin with my son.

5. I am afraid of dying alone.

APPENDIX E
LIFE STRENGTHS INTERVIEW GUIDE

INTRODUCTION
What is it about your life:
...that is most worth living for?
...that makes you feel most alive?
...that makes you feel most like yourself?
[*Probe: These can be things that may seem quite small, like brewing Earl Gray tea in your familiar china teapot, or working at your computer, or cooking the dishes you've been making for decades. Or they may be things that seem larger, like making sure your grandchildren learn good values, or writing letters for Amnesty International, or voting, or working for causes you believe in.*]

HOPE & FAITH (Trust & Mistrust)
What is it in your life that gives you hope?
How do moral beliefs and values fit into your life?
How have they fit in earlier times?
What is your religious affiliation?
What about religion is most important to you?
How do you like to express your religious beliefs?
Is religion something you practice in private?
Is some group religious activity important to you?
What is it in your life that gives you a sense of security?
What do you tell yourself or think about when you're afraid and you need to believe that things will be all right?

WILLFULNESS, INDEPENDENCE & CONTROL (Autonomy & Shame/Doubt)
(We all like to be in control of ourselves and our lives. And when you think about it, we spend most of our lives trying to strike a tolerable balance between being independent and having things the way we want them, on one hand, and accepting help and going along with other people's wishes, on the other hand.)
How is your health these days?
Do you:
...have any physical limitations?
...have any disease or conditions for which you're being treated?
...take medications?
...rely on aids such as glasses, hearing aid, cane/walker/wheelchair, etc.?
...rely on assistance with homemaking, personal care, etc.?
What part of your life is most important that *you* stay in charge of?
What kinds of control are easier to give up, as long as you remain in charge of what's really important?
[*Probe to prioritize autonomy-related issues in daily life. Levels of probe vary, depending on whether elder currently lives independently or in some kind of protected environment.*
E.g.: What you eat; where you eat; when you eat; making your own food; feeding yourself; what you wear; dressing yourself; walking, toileting, and bathing yourself; who assists you with ADLs?
Daily routine:
　　　Listening to radio and TV as you wish
　　　Use the telephone when you wish
　　　Go out and come back when you wish
　　　Have access to preferred reading materials
　　　Get-up time; mealtime; nap time; bedtime
Living in your own home:
　　　Decorate as you wish
　　　Save belongings as you wish
　　　Lock your door to keep out whomever you want to keep out

Following your doctor's orders as you wish
Hospitalization vs. outpatient treatment
Surgery vs. non invasive treatment
Respirators; artificial nutrition; artificial hydration
Spending money:
Spend money on your own enjoyment
Spend money on your own care
Save money for a rainy day (What is a rainy day?)
Save money to leave to your heirs.]
What kinds of independence would you find especially painful to give up?
What do you think might make it easier to accept help, when you wish you didn't need help in the first place?
What is it that has always given you confidence in yourself?
What kind of decisions are absolutely most important that you make for yourself?
What kinds of decisions are you willing to have someone else make for you? Who?

PURPOSEFULNESS, PLEASURE, & IMAGINATION (Initiative & Guilt)
What kinds of things do you enjoy doing? What kinds of activities give you pleasure?
What kinds of activities have always given you pleasure?
[Probe: Eating, movies; walking; cooking; concerts' museums; library; parks; shopping; visiting with friends; travel; reading; writing; helping; babysitting; radio; music; work with hands; care for plants; charity; volunteer work; church work; arts; sports; housecleaning; making things for people]
What do you do for fun these days?
What would you do for fun if you could do anything in the world?
What have you done, in your like, that makes you proudest?
What is there that you've always been curious about?
What do you want to do, most of all, with the rest of your life?

COMPETENCE & HARD WORK (Industry & Inferiority)
What have you worked hard at?
What would you like to be working at now, if you were able?
What kinds of things have you always been good at?
What kinds of things are you good at now? What skills do you have? Or areas of expertise?
[Probe: These may be professionally related skills like accounting or photography, or they may be personal skills like reading poetry, or cooking certain special dishes, or making phone calls.]
What is there that you've always wanted to learn, but never quite gotten around to?
What do you wish you could do better?
Would you find it easier to accept assistance if you could trade some skill or activity in return?

VALUES & SENSE OF SELF (Identity & Confusion)
What is it about life that makes you feel most like yourself? Why do you think this activity or belief or relationship makes you feel this way?
What do you believe in?
Do you have a philosophy of life that has guided the way you live your life?
That guides your life today?
What kind of person would you say:
...you are?
...you have always been?
What is the image that you carry around inside, about who you are in the world?
When people describe you, what do they say? What would you like them to say?

LOVE & FRIENDSHIP (Intimacy & Isolation)
Who is important to you in your life today? Where do they live?
Whom do you count on these days? Who counts on you?
Whom do you have contact with these days?
Who, among these, are people you contact by choice?
Tell me about someone you've loved at some point in your life.

Can you tell me about:
...your marriage?
...your best friend?
What do the people who know you best like most about you? What do they respect most in you?
Who, in which relationships, has brought out the best in you?
How do you feel about being alone these days?

CARE & PRODUCTIVITY (Generativity & Self-Absorption)
Whom or what do you especially care about?
[Probe: What people, pets, ideas, activities, organizations and issues concern you? What plants and objects ,people and issues are you sure to take care of?]
How do you show your caring?
Who is there that you lean on, these days? Who leans on you?
Who is there, that it's important to you to be good for? Or to be nice to? Or to set a good example for?
What is there about yourself and your life that you want to make sure people remember?
Who and what have you cared about over the years? Whom have you cared for? Take care of? Tell me about them.
What's the most important thing for you to do with your life these days?
Who is the person who makes you think, "This is the one who will carry on for me when I'm gone"?

WISDOM & PERSPECTIVE (Integrity & Despair)
What is there about your life that you wish had been different?
What is there that you're struggling to make sense of, about the world?
What has been most meaningful about your life so far?
How do you deal with disappointment? How do you experience joy?
What strategies have you used for coping with fear?
Let's talk a bit about death:
...your own death?
...how you'd like to die?
...where you'd like to die?
...who should be there with you?
...anything you'd want to be sure and get done first?
...anything you'd want to be sure to say to anyone first?
...who should take what kinds of measures to prolong your life?
Have these thoughts changed over the years?
Are you afraid of dying?
Do you know what you're afraid of?
Do you have any ideas a bout what might help you be less afraid?

PUTTING IT ALL TOGETHER AGAIN
What is it about your life today that:
...makes you feel most alive?
...is most worth living for?
...makes you feel most like yourself?
I'd like you to think back over your whole life. Over everything you've seen and everything that's happened to you. And I'd like you to tell me a story about something in your life. Anything. But a story from your life that is somehow meaningful for you.

[From: Kivnick, H. Q. (1993, Winter/Spring). Everyday Mental Health: A Guide to Assessing Life Strengths. Generations, 18-19.]

APPENDIX F

**Evaluation: Life Strengths Workshop Session #1
Introductions/Listening and Interviewing Skills**

1. How would you rate the training of this session?

   Excellent _____   Fair _____   Not Worthwhile _____

   Good _____   Poor _____   Other (specify) _____

2. How would you rate each of the following?

Use: (E) Excellent, (G) Good, (F) Fair, (P) Poor

   I. Welcome and Introduction _____

   II. Ice Breaker (introducing someone else in the group) _____

   III. Handouts:

         A. Keys to Good Communication _____

         B. Ten Commandments for Good Listening _____

         C. Listener Responses _____

   IV. Small Group Exercise on Listening _____

   V. Attitude and Communication _____

3. Did the training session add to your knowledge and skill?

   Yes _____, How?

   No _____, Why not?

4. What did you like the most in this session?

   What did you like the least in this session?

5. Any further comments/suggestions:

Appendix G

Erikson's Psychosocial Themes and Stages of Life

Old Age								Integrity vs. Despair. WISDOM
Adulthood							Generativity vs. Self-absorption. CARE	
Young Adulthood						Intimacy vs. Isolation. LOVE		
Adolescence					Identity vs. Confusion. FIDELITY			
School Age				Industry vs. Inferiority. COMPETENCE				
Play Age			Initiative vs. Guilt. PURPOSE					
Early Childhood		Autonomy vs. Shame. Doubt. WILL						
Infancy	Basic Trust vs. Basic Mistrust. HOPE							

[From: Erikson, E. H., Erikson, J., & Kivnick, H. Q. (1986). Vital Involvement In Old Age. New York: W. W. Norton & Co.]

Appendix H

Stage One

Infancy (about birth — one year old)

Opposing Issues: Trust vs. Mistrust

Emerging strength: HOPE

Basic Trust: Basic trust is an attitude toward oneself and the world derived from the experiences of the first year of life. It is the first component of a healthy personality.

Trust: Trust is a reasonable trustfulness of others and a trustworthiness in oneself. Mothers and others in this role usually are the ones who create the child's sense of trust through feeding the child when hungry and comforting the child when frightened or hurting.

Mistrust: Mistrust is characterized in adulthood by becoming withdrawn, suspicious of others, and lacking self confidence.

HOPE: Hope is the most essential overall outlook on life, created by the balance of trust and mistrust. Hope is the basis of faith.

Relation to Old Age: As a person ages, an infant's trust is related to an older person's appreciation for human interdependence.

Appendix I

Stage Two

Early Childhood (about 2 – 3 years old)

Opposing Issues: Autonomy vs. Shame and Doubt

Emerging Strength: WILL

Autonomy: Autonomy is striving to become independent.

Shame/Doubt: Shame and doubt are feelings of being completely exposed, self-conscious, and not in control.

WILL: Will is the determination to exercise free choice as well as self-restraint. It also is a sense of control over one's body, behavior, and life.

Relation to Old Age: An example of how a person can relate back to this stage in old age is by accepting body deterioration and confronting limitations.

Appendix J

Stage Three

Play Age (about 4 – 5 years old)

Opposing Issues: Initiative vs. Guilt

Emerging Strength: PURPOSE

Initiative: Initiative is seen in forming and carrying out goals, intrusion, competition, and taking initiative. It may also be seen in physical attack, aggressive talking, vigorous locomotion, and curiosity.

Guilt: Guilt may show itself at this stage through immoral thoughts or behavior and by the fear of punishment.

PURPOSE: Having the courage to pursue goals without guilt taking over.

Relation to Old Age: Ways in which the Play Age Stage can be related back to in old age is through resiliency, empathy, and by having a sense of humor.

Appendix K

Stage Four

School Age (about age 6 – puberty)

Opposing Issues: Industry vs. Inferiority

Emerging Strength: COMPETENCE

Industry: Industry is shown at this stage by success that brings feelings of competence, accomplishment, and mastery.

Inferiority: Inferiority shows up through a sense of inadequacy and ineptitude.

COMPETENCE: Competence is the strength that arises in this stage through the free exercise of dexterity and intelligence in the completion of tasks, unimpaired by a threatening sense of inferiority.

Relation to Old Age: Youth's competence relates to humility in age. Competence in old age is built on the integration of a lifetime of ability and inability.

Appendix L

Stage Five

Adolescence

Opposing Issues: Identity vs. Confusion

Emerging Strength: FIDELITY

Identity: Identity is obtained through attaining confidence of inner sameness and continuity in the self. It involves having personal commitments to attitudes and beliefs and having activities and relationships that reflect these beliefs.

Confusion: Confusion arises when a person does not have a sense of identity.

FIDELITY: Fidelity is the ability to be faithful and loyal to others in spite of the inevitable contradictions of value systems and is only possible if identity is achieved.

Relation to Old Age: In old age, identity is defined in other ways than mastery and abstract knowledge. Identity is defined through feelings, intuitions, intimacy, tenderness, and coming to terms with love expressed and unexpressed during one's entire life.

Appendix M

Stage Six

Young Adulthood

Opposing Issues: Intimacy vs. Isolation

Emerging Strength: LOVE

Intimacy: Intimacy involves close associations and commitments with the opposite sex, same sex, and oneself.

Isolation: Isolation involves social relationships that are stereotyped, cold, and empty. It is a fear of being separated and unrecognized by others.

LOVE: Love is a strength that evolves with success in intimacy with self and others.

Relation to Old Age: The issues from young adulthood are reviewed in old age by coming to terms with love, expressed and not expressed, over the course of a whole life cycle.

Appendix N

Stage Seven

Middle Adulthood

Opposing Issues: Generativity vs. Stagnation

Emerging Strength: CARE

Generativity: Generativity involves interest in establishing and guiding the next generation through child rearing or creative and productive endeavors. The experiences of caring, nurturing, and maintaining are also part of generativity.

Stagnation: Stagnation is self-indulgence, boredom, and a lack of psychological growth.

CARE: The emerging strength of care involves the concern for what has been generated by love and necessity and also involves attending to all that has been generated.

Relation to Old Age: Caring for other should be maintained throughout old age and along with it the older person may be required to accept care from others.

Stage Eight

Late Adulthood

Opposing Issues: Integrity vs. Despair

Emerging Strength: WISDOM

Integrity: Integrity involves an accepting of the limitations that late life can bring and having a sense of being a part of a larger history that includes previous generations. It involves striving for order and meaning of one's life.

Despair: Despair involves regret for what one has done or not done with one's life, fear of approaching death, and not accepting oneself. Feelings of dread and hopelessness may also arise.

WISDOM: "Informed and detached concern with life itself, in the face of death itself" (Erikson, 1982).

Appendix Q

A Strengths Perspective

• look for positive attributes and capabilities

• look at gains the person has made in life

• look for talents, abilities, capacities, skills resources, aspirations
(all people possess a wide range of these)

• look for what kind of life the person wants
(what resources are needed to help now)

LIFE STRENGTHS INTERVIEW GUIDE

INTRODUCTION
*What is it about your life:
...that is most worth living for?
...that makes you feel most alive?
...that makes you feel most like yourself?

[*Probe: These can be things that may seem quite small, like brewing Earl Gray tea in your familiar china teapot, or working at your computer, or cooking the dishes you've been making for decades. Or they may be things that seem larger, like making sure your grandchildren learn good values, or writing letters for Amnesty International, or voting, or working for causes you believe in.*]

HOPE & FAITH (Trust & Mistrust)

*What is it in your life that gives you hope?

*How do moral beliefs and values fit into your life?

*How have they fit in earlier times?

*What is your religious affiliation?

*What about religion is most important to you?

*How do you like to express your religious beliefs?

*Is religion something you practice in private?

*Is some group religious activity important to you?

*What is it in your life that gives you a sense of security?

*What do you tell yourself or think about when you're afraid and you need to believe that things will be all right?

WILLFULNESS, INDEPENDENCE & CONTROL
(Autonomy & Shame/Doubt)

(We all like to be in control of ourselves and our lives. And when you think about it, we spend most of our lives trying to strike a tolerable balance between being independent and having things the way we want them, on one hand, and accepting help and going along with other people's wishes, on the other hand.)

*How is your health these days?

*Do you:

...have any physical limitations?

...have any disease or conditions for which you're being treated?

...take medications?

...rely on aids such as glasses, hearing aid, cane/walker/wheelchair, etc.?

...rely on assistance with homemaking, personal care, etc.?

*What part of your life is most important that *you* stay in charge of?

*What kinds of control are easier to give up, as long as you remain in charge of what's really important?

[*Probe to prioritize autonomy-related issues in daily life. Levels of probe vary, depending on whether elder currently lives independently or in some kind of protected environment.*

E.g.: What you eat; where you eat; when you eat; making your own food; feeding yourself; what you wear; dressing yourself; walking, toileting, and bathing yourself; who assists you with ADLs?

Daily routine:

    Listening to radio and TV as you wish

    Use the telephone when you wish

    Go out and come back when you wish

    Have access to preferred reading materials

    Get-up time; mealtime; nap time; bedtime

Living in your own home:

    Decorate as you wish

    Save belongings as you wish

    Lock your door to keep out whomever you want to keep out

    Leave your house to whomever you choose

Medical treatment:

    Following your doctor's orders as you wish

    Hospitalization vs. outpatient treatment

    Surgery vs. non invasive treatment

    Respirators; artificial nutrition; artificial hydration

Spending money:

    Spend money on your own enjoyment

    Spend money on your own care

    Save money for a rainy day (What is a rainy day?)

    Save money to leave to your heirs.]

*What kinds of independence would you find especially painful to give up?

*What do you think might make it easier to accept help, when you wish you didn't need help in the first place?

*What is it that has always given you confidence in yourself?

*What kind of decisions are absolutely most important that you make for yourself?

*What kinds of decisions are you willing to have someone else make for you? Who?

PURPOSEFULNESS, PLEASURE, & IMAGINATION

(Initiative & Guilt)

*What kinds of things do you enjoy doing?

*What kinds of activities give you pleasure?

*What kinds of activities have always given you pleasure?

[Probe: Eating, movies; walking; cooking; concerts' museums; library; parks; shopping; visiting with friends; travel; reading; writing; helping; babysitting; radio; music; work with hands; care for plants; charity; volunteer work; church work; arts; sports; housecleaning; making things for people]

*What do you do for fun these days?

*What would you do for fun if you could do anything in the world?

*What have you done, in your like, that makes you proudest?

*What is there that you've always been curious about?

*What do you want to do, most of all, with the rest of your life?

COMPETENCE & HARD WORK
(Industry & Inferiority)

*What have you worked hard at?

*What would you like to be working at now, if you were able?

*What kinds of things have you always been good at?

*What kinds of things are you good at now?

* What skills do you have? Or areas of expertise?

[Probe: These may be professionally related skills like accounting or photography, or they may be personal skills like reading poetry, or cooking certain special dishes, or making phone calls.]

*What is there that you've always wanted to learn, but never quite gotten around to?

*What do you wish you could do better?

*Would you find it easier to accept assistance if you could trade some skill or activity in return?

Appendix W

Evaluation: Life Strengths Workshop Session #3

Interview Guide (First Half)

1. How would you rate the training of this session?

Excellent _____   Fair _____   Not Worthwhile _____

Good _____   Poor _____   Other (specify) _____

2. How would you rate each of the following.

Use: (E) Excellent, (G) Good, (F) Fair, (P) Poor

I. Structure of Session _____

II. Learning about Life Review _____

III. Learning about a Strengths Perspective _____

IV. The Life Strengths Interview Guide _____

V.   Video Segments _____

VI. Skill Building _____

3. Did the training session add to your knowledge and skill?

Yes _____, How?

No _____, Why not?

4. What did you like most about this session?

What did you like least about this session?

5. Any further comments/suggestions:

VALUES & SENSE OF SELF (Identity & Confusion)

*What is it about life that makes you feel most like yourself?

*Why do you think this activity or belief or relationship makes you feel this way?

*What do you believe in?

*Do you have a philosophy of life that has guided the way you live your life?

*That guides your life today?

*What kind of person would you say:

...you are?

...you have always been?

*What is the image that you carry around inside, about who you are in the world?

*When people describe you, what do they say?

*What would you like them to say?

LOVE & FRIENDSHIP (Intimacy & Isolation)

*Who is important to you in your life today?

*Where do they live?

*Whom do you count on these days?

*Who counts on you?

*Whom do you have contact with these days?

*Who, among these, are people you contact by choice?

*Tell me about someone you've loved at some point in your life.

*Can you tell me about:

...your marriage?

...your best friend?

*What do the people who know you best like most about you?

*What do they respect most in you?

*Who, in which relationships, has brought out the best in you?

*How do you feel about being alone these days?

CARE & PRODUCTIVITY
(Generativity & Self-Absorption)

*Whom or what do you especially care about?

[Probe: What people, pets, ideas, activities, organizations and issues concern you? What plants and objects ,people and issues are you sure to take care of?]

*How do you show your caring?

*Who is there that you lean on, these days?

*Who leans on you?

*Who is there, that it's important to you to be good for? Or to be nice to? Or to set a good example for?

*What is there about yourself and your life that you want to make sure people remember?

*Who and what have you cared about over the years?

*Whom have you cared for? Take care of?
Tell me about them.

*What's the most important thing for you to do with your life these days?

*Who is the person who makes you think, "This is the one who will carry on for me when I'm gone"?

WISDOM & PERSPECTIVE (Integrity & Despair)

*What is there about your life that you wish had been different?

*What is there that you're struggling to make sense of, about the world?

*What has been most meaningful about your life so far?

*How do you deal with disappointment? How do you experience joy?

*What strategies have you used for coping with fear?

*Let's talk a bit about death:

...your own death?

...how you'd like to die?

...where you'd like to die?

...who should be there with you?

...anything you'd want to be sure and get done first?

...anything you'd want to be sure to say to anyone first?

...who should take what kinds of measures to prolong your life?

*Have these thoughts changed over the years?

*Are you afraid of dying?

*Do you know what you're afraid of?

*Do you have any ideas a bout what might help you be less afraid?

PUTTING IT ALL TOGETHER AGAIN

*What is it about your life today that:

...makes you feel most alive?

...is most worth living for?

...makes you feel most like yourself?

I'd like you to think back over your whole life. Over everything you've seen and everything that's happened to you. And I'd like you to tell me a story about something in your life. Anything. But a story from your life that is somehow meaningful for you.

[From: Kivnick, H. Q. (1993, Winter/Spring). Everyday Mental Health: A Guide to Assessing Life Strengths. <u>Generations</u>, 18-19.]

Certificate of Completion

This is to certify that (participant's name) has completed the training

workshops for the Life Strengths Interview Guide.

Date of Completion _____

These training sessions were designed to instruct participants in the

following areas:

- Listening and interview skills

- Erik Erikson's life cycle theory

- Life review and strengths

- Using a life strengths interview guide with clients

Signed _____

(trainer)

Date _____

Appendix DD

Evaluation: Life Strengths Workshop Session #4

Interview Guide (Second Half)

1. How would you rate the training of this session?

   Excellent _____   Fair _____   Not Worthwhile _____

   Good _____   Poor _____   Other (specify) _____

2. How would you rate each of the following.

   Use: (E) Excellent, (G) Good, (F) Fair, (P) Poor

   I. Structure of Session _____

   II. Life Strengths Interview Guide _____

   III. Video Segments

   IV. Sharing Stories _____

3. Did the training session add to your knowledge and skill?

   Yes _____, How?

   No _____, Why not?

4. What did you like most about this session?

   What did you like least about this session?

5. Any further comments/suggestions:

Appendix EE

Three Month Evaluation

Date

Dear _____,

A few months ago you attended the life strengths interview guide workshops at

_____. It would be very appreciated if you could take a few

minutes to complete the enclosed evaluation now that you're had some time to

use the guide with your clients. Your information will be useful in order to see if

things should be done differently in future training sessions. Please return the

enclosed evaluation in the return envelope provide. You may need to refer back

tot he guide to answer questions, if you need another guide please call me at

_____.

Thank you very much!

_____

(trainer's name and signature)

Appendix FF

Three Month Evaluation

• Have you used any part of the guide with a client?

• How many clients have you used at least one question of the guide with?

• What questions (or sections) of the guide do you find most useful or helpful with clients?

• What questions/sections of the guide do you find to be least helpful or useful with clients?

• Other comments:

Appendix GG

Hope & Faith

Video Segment Summary

Volunteer sits down with client. Volunteer (amidst small talk) notices a Bible on the table. Talk centers around the client feeling lonely and how there is hardly anyone left in her family anymore, all have died. Volunteer inquires about the Bible, "I notice you have a Bible here..." and uses questions from the Hope and Faith section of the guide to inquire about the person's strengths. Questions to possibly use here are:

"What is your religious affiliation?" "How do you express your religious beliefs?" "Is some group or religious activity important to you?" This may have changed for the person as she has grown older. Maybe she is unable to get to church. If religion is an important area in her life, then it could be inquired into if there is someone from the church to take her, or if a clergy person visits people in their homes, or what services are available to seniors through the religious institution. Areas or ways in which the older person is able to express or practice this strength can be discussed.

In this example, the volunteer used an object (the Bible) that was present in order to bring up the topic of conversation. The client was able to reflect on her past and current religious practices. The volunteer should remember to use active listening responses by not reflecting his or her own beliefs or ideas (if different from the client) onto the client but listen for feelings, values, attitudes, and needs.

The volunteer's clients may have a variety of ways they practice religion or they may not at all. The key here is to get the client talking about his or her

experiences, reflecting, looking back, and for the volunteer to help discover strengths and be a good listener through echoing, paraphrasing, and active listening.

Appendix HH

Purpose, Pleasure, & Imagination

Video Segment Summary

Volunteer sits down with client. The conversation comes around to the volunteer asking the client "What kinds of things do you enjoy doing?" This is a question from this segment of the guide. It should be pretty easy to ask a client this type of question, as it is fairly basic to ask when you are getting to know someone. The client answers, "Oh, I can't do much of anything anymore." The volunteer then asks, "What kinds of activities have always given you pleasure?" Conversation focuses on these things, but if it is hard to get answers from this question, the volunteer could go on to ask, "What would you do for fun if you could do anything in the world?" The volunteer picks up on these answers and may need to use probes if the client is stuck. Finally, ask the client, "What would you want to do, most of all, with the rest of your life?"

Appendix II

Care & Productivity

Video Segment Summary

Volunteer sits down with client. Amidst conversation, the volunteer asks questions to try and get an idea about who or what the client especially cares about. The volunteer may get ideas from what's in the client's environment. Is there a pet? Lots of plants? A collection of sorts (e.g. bells, books, music boxes...)? How does the client show his or her care for these persons/things?

Volunteer asks the client about people he or she has cared for over the years - a spouse, children, grandchildren, siblings, parents, friends,...
The volunteer asks the client to talk about these people.

The volunteer then asks the client if there is anyone that makes him or her think, "this person will be the one to carry on for me when I'm gone". Then ask the client to talk more about this person if he or she hasn't done so already.

Appendix JJ

Wisdom & Perspective

Video Segment Summary

Volunteer sits down with client. Amidst conversation, the volunteer asks the client if there is anything about his or her life that he or she wishes were different (e.g. "I worked too much"). The volunteer then asks "What has been the most meaningful about your life so far?"

Some clients are willing to talk freely about death. If you sense this is true, then ask:

"Is there anything you want to be sure to get done before you die?"

"Where would you like to be when you die?"

"Who should be there with you?"

"Are you afraid of dying?"

"If so, what would help you to be less afraid?"

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