

WORDS FROM THE WISE: A QUALITATIVE AND QUANTITATIVE STUDY  
OF NOMINATED EXEMPLARS OF WISDOM

by

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## **Abstract**

### **Words From the Wise:**

#### **A Qualitative and Quantitative Study of Nominated Exemplars of Wisdom**

**by**

**Drew Krafcik**

The purpose of this dissertation was to study exemplars of wisdom through a structured, theoretically grounded peer-nomination process. Twenty exemplars were given a variety of quantitative measures that included the Self-Assessed Wisdom Scale (SAWS), State-Trait Anxiety Inventory (STAI), Perceived Stress Scale (PSS-10), Spiritual Perspective Scale (SPS), Satisfaction With Life Scale (SWLS), Loyola Generativity Scale (LGS), Mindful Attention Awareness Scale (MAAS), Narcissistic Personality Inventory-16 (NPI-16), Humility Inventory (HI), Big Five Inventory (BFI), and the Washington University Sentence Completion Test (WUSCT). Exemplars also underwent lengthy semi-structured interviews to assess their lives, qualities, and understanding of wisdom. Interviews were analyzed for their significant themes. Results of this study suggest that exemplars of wisdom are humble, spiritual, mindful, insightful, tell the truth, and are open to experiences. They have meaningful, long-term relationships with mentors and loved ones. Exemplars are deeply influential in the lives of others and have very high life satisfaction. The 2 predominant definitions of wisdom given by exemplars were that wisdom is practical and comes from the unknown. Exemplars offered multiple strategies for the cultivation of wisdom-related processes, primarily the relationship with a mentor. Future research may clarify an emerging relationship between transcendent and practical wisdom.

## Dedication

This dissertation is dedicated to Amy Larimer and Jim Ewing. We should all be lucky enough to be mentored by such wise and loving souls.

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## Preface

Whatever wisdom or helpful words are found in this book, they are not my own; but rather they arise out of our collective efforts. . . . However, whatever is not wise in these pages I will take credit for. As someone once said, “All wisdom is plagiarism, only foolishness is original.” (Gil Fronsdal, 2001, p. vii)



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## Chapter 1: Introduction

Would investigating people who are actually considered wise be helpful for the human enterprise? Might they offer reflections about life meaning and satisfaction that elude the rest of us? Could they provide both practical and theoretical insights into wisdom's conception, cultivation, and potential to be learned and taught? What are their spiritual perspectives, generative offerings, and experiences of anxiety and stress? To date, the psychological investigation of wisdom has primarily focused on randomly selected people and their ideas on what wisdom is, but not a single study of wise people has been found (Trowbridge, 2005).

Echoing the sentiments of Aristotle (Robinson, 1990) and Abraham Maslow (1971), lifespan experts Lucinda Orwoll and Marion Perlmutter (1990) wrote, "To really know what wise people are like, you have to study them" (p. 174). Advancing this notion, the present research descriptively and empirically explored the lives, opinions, and wisdom-related characteristics of those who have purportedly excelled in its understanding.

### *Significance of the Psychological Study of Wisdom*

Once regarded as a topic worthy of the most rigorous inquiries in order to discern its nature and benefits, wisdom is currently overlooked as a subject for serious scholarly investigation in many fields (Arête Initiative, 2007, Introduction section, para. 1; Birren & Fisher, 1990). Yet it is hard to imagine a subject more essential to the human enterprise and its exploration holds greater promise in shedding light on, and opening up novel possibilities for, human flourishing (Ardelt, 2004b; Arête Initiative, 2007; Baltes, 2004; Gluck & Baltes, 2006; Snyder & Lopez, 2002; Sternberg, 1990). The daunting crises facing the global community and the increasing need for wise decision making also propel investigations of wisdom to the

forefront of interdisciplinary consideration (Ardelt, 2000a; Baltes & Staudinger, 2000; Jordan, 2005; Solomon, Marshall, & Gardner, 2005; Sternberg, 2004; Trowbridge, 2005).

In 2004, the World Commission on Global Consciousness and Spirituality convened the World Wisdom Council to “cultivate wisdom as the highest priority for our time” (p. 11). This initiative yielded the Budapest Declaration, a contemporary context for wisdom titled “Wisdom at the Tipping Point: Shifting to a New Thinking and a New Civilization”

We conclude that the question is no longer whether a fundamental change is coming, but whether the change will be for the better or for the worse, when it will be coming and at what price. . . . All of us now share the responsibility of realizing that we live at the tipping point of contemporary civilization and for recognizing that informed thinking and responsible acting are needed to bring us to the threshold of a civilization that is truly peaceful and sustainable. (World Wisdom Council, 2004, p. 4)

Trowbridge (2005) agrees that a globally collaborative approach to the prioritizing of wisdom is highly advantageous, if not a “*sine qua non* for energizing the will of the global community to use our resources and knowledge humanely” (p. 253). Likewise, 2003 President of the American Psychological Association, Robert Sternberg contends that the world itself is in jeopardy if wisdom is not made a priority (2003, 2004).

#### *Exemplar Relevance in the Psychological Study of Wisdom*

Despite a rich recorded history of wisdom dating back before 1000 BCE (Baltes, 2004; Birren & Svensson, 2005; Brugman, 2000; Robinson, 1990) the psychological study of wisdom in general is young, originating about 35 years ago (Baltes & Smith, 1990; Clayton, 1975). Likely factors are thought to be its association with philosophy, the early 20th century dominance of psychology by behaviorism, and difficulties in its assessment (Birren & Fisher, 1990). However, despite its late arrival as a comprehensive psychological field of study, individual, periodic attempts were made to describe wisdom for nearly the century that

psychology has existed. Note that these attempts were aimed toward describing wisdom itself rather than studying wise people.

Stanley Hall (1922/1972), the first president of the American Psychological Association, was one of the first psychologists to offer his thoughts of wisdom, although indirectly, in his reflective extended essay about both the weaknesses and possibilities of aging. Subsequently, the lifespan model of Erikson (1959; Clayton & Birren, 1980) and the appearance of lifespan psychology (Baltes & Staudinger, 2000) were primarily responsible for keeping wisdom in the domain of psychological analysis.

In the late 1970s and early 1980s the topic of wisdom was engaged by psychological researchers (Baltes & Staudinger, 2000; Clayton, 1975; Clayton & Birren, 1980). According to Brugman (2006), “The general goal in the first period around 1980 was a theoretical exploration of the concept” (p. 445). Emerging from these investigations have been various multidimensional theoretical models (e.g., Ardelt, 2000a, 2004b; Baltes & Smith, 1990; Kramer, 1990, 2000; Robins, 1998; Sternberg, 1986, 1998); implicit and explicit theories (e.g., Baltes & Staudinger, 1993; Holliday & Chandler, 1986; Levenson, Adlwin, & Cupertino, 2001; Sternberg, 1986); empirical assessments (e.g., Jason, Reichler, King, Madsen, Camacho, & Marchese, 2001; Webster, 2003, 2007); cross-cultural definitions (e.g., Takashashi & Bordia, 2000; Takashashi & Overton, 2002; Yang, 2001); developmental paradigms (e.g., Brugman, 2006; Labouvie-Vief, 1990; Staudinger & Pasupathi, 2003); and personal dimensions (e.g., Lyster, 1996; Staudinger, 1999; Trowbridge, 2005). Moreover, the emergence of an edited overview (Sternberg, 1990; Sternberg & Jordan, 2005) as well as wisdom entries in various behavior-oriented science encyclopedias signaled an interest in wisdom-related investigations (Baltes & Staudinger, 2000).

In a comprehensive and critical review of the last 25 years in the psychological study of wisdom, Trowbridge (2005) summarized what has been learned:

1. Wisdom has been reintroduced into contemporary scholarship through the establishment of empirical study.
2. Wisdom is operationalized many different ways. It is a unique construct related to, but distinct from, emotional and cognitive intelligence or any other personality trait.
3. While much research has been aimed toward defining wisdom, the question has not been resolved.
4. Wisdom is an area in which older people may excel.
5. Wisdom as expertise and as a heuristic toward the meaning and conduct of life are rich with possibilities.
6. The greatest predictive factor for wisdom has been found to be a profession in a field such as clinical psychology and pastoral/ministerial counseling.
7. Positive correlations have been found between life satisfaction and wisdom, or particular personality traits such as openness, social intelligence, and moral reasoning.
8. Researchers have found, but are only beginning to realize, that wisdom may be enhanced through consulting with others, or through allowing time for a person to think over a situation (p. 254).

Since 1980, over 100 empirical studies of wisdom have been published (Trowbridge, 2011). There were five in the 1980s, 21 in the 1990s, and close to 80 have appeared between 2000 and 2011. Noticeably absent from these explorations is the study of exemplars, although it remains an urgent, missing piece of the picture (Maslow, 1971; Orwoll & Perlmutter, 1990;



Trowbridge, 2005). Referencing his comprehensive and critical review of the contemporary psychological wisdom field, Trowbridge concludes, “As long as there is no investigation of people who are actually considered wise, the study of wisdom will be seriously incomplete” (2005, p. 257). The proposed research begins to address this gap.

### *Defining Wisdom*

Contemporary researchers (e.g., Ardel, 2004b; Baltes, 2004; Baltes & Staudinger, 2000; Sternberg, 1998; Yang, 2001) agree that defining wisdom is an enterprise laden with complexity that necessitates multiple perspectives. Sternberg (1990) pointed out that “to really understand wisdom requires more wisdom than any of us have. We cannot quite comprehend the nature of wisdom because of our own lack of it” (p. 3).

Moreover, the organization of wisdom conceptions is perhaps as abundant as its definitions. For example, Sternberg (1998) advanced a distinction between implicit theories, which constitute folk-psychological and common-sense perspectives, and explicit theories, which comprise behavioral manifestations or expressions of wisdom. Brugman (2006), like Socrates, sorted wisdom by pragmatic and epistemic categories, or practical and theoretical knowledge. Western and Eastern conceptions of wisdom, or the emphasis on cognitive versus integrative and transcendent aspects of human consciousness, were employed by Takashashi and Overton (2002) and by Le and Levenson (2005). Oser, Schenker, and Spychiger (1999), maintaining that research on wisdom has followed three approaches: wisdom as wise persons, as expertise, and as wise actions, presented their own wisdom as wise actions approach, wherein “wisdom is in the act itself and is treated always as situated wisdom” (p. 156). Personal and general conceptions of wisdom were put forth by Staudinger (1999).

Despite these variations, the contemporary scope of wisdom definitions include dictionary (e.g., Kekes, 1995; Sternberg, 1990), cultural variations (e.g., Takahashi & Bordia, 2000; Yang, 2001), kinds of wisdom (Kramer, 1990), wisdom as optimal choice (e.g., Kohl, 2001; Pasupathi, Staudinger, & Baltes, 2001), wisdom toward a good life (e.g., Csikszentmihalyi & Rathhunde, 1990), wisdom as the common good (Sternberg, 1998), wisdom as insight based into the meaning of life (e.g., Ardelt, 2000a; Kekes, 1995), expertise in the conduct and meaning of life (e.g., Baltes & Staudinger, 1993), seeing through illusion (McKee & Barber, 1999), as reflectiveness and judgment (Blanshard, 1967), understanding the limitations of one's knowledge (e.g., Brugman, 2006; Meacham, 1990) personal aspects of wisdom (Ardelt, 2004b; Staudinger, 1999), integration (e.g., Ardelt, 1997; Kramer, 2000; Sternberg, 1998, 2003; Yang, 2001) and both the ability to address ego related cognition-emotion interactions and to transcend that ego (Levenson, Jennings, Aldwin, & Shiraishi, 2005; Robins, 1998).

Many theorists (e.g., Birren & Fisher, 1990; Pelechano 2006; Sternberg, 1990; Trowbridge, 2005) agree that multiple definitions of wisdom are not threatening to its understanding and conceptualization, but rather enrich universal conversation and encourage widespread interest in its cultivation. Trowbridge (2005) asserts that a dialectical process of maximum public participation seems to be the best way to discuss wisdom.

Accordingly, a discussion of proposed wisdom definitions, conceptions, and theoretical psychological models was put forth in the literature review as a necessary context for the main focus of this study: exploring the lives, opinions, and wisdom-related characteristics and qualities of purported exemplars of wisdom. While research and theory to date (e.g., Sternberg & Jordan, 2005) indicate that modern notions of wisdom seem to converge around its conception as elusive, multidimensional, integrative, and aimed toward what is good—both individually and

collectively—it has been suggested that these descriptors might better be understood as necessary, but not sufficient, in beginning to illuminate its essence (Baltes, Staudinger, Maercker, & Smith, 1995). For the current study, a wisdom conception was chosen for the purposes of operationalization, assessment, and comparison. More will be said about this in the next chapter.

Other exploratory and experimental factors relevant to the investigation of wisdom exemplars included openness, spirituality, mindfulness, generativity, humility, anxiety, stress, narcissism, and life satisfaction. Andrew Achenbaum (2004), a historian of aging and wisdom, writes that we should “broaden our field of vision” (p. 303) of wisdom, given wisdom’s value in human relations, and introduce new empirical measures to elicit hidden insights. Although he recommended the concepts of forgiveness and love, little to no empirical assessment in the psychological study of wisdom has addressed spirituality (Le, 2008a), mindfulness, anxiety, narcissism, humility, and stress. Factors are defined and related to personal qualities associated with wisdom. Comprehensive references are provided to the reader to enable further investigation.

### *Design Overview*

Engaging with the suggested protocols of previous researchers (e.g., Montgomery, Barber, & McKee, 2002; Orwoll & Perlmutter, 1990), exemplar and personological approaches were implemented to operationalize this investigation. The exemplar approach makes use of qualified nominators to identify individuals who exemplify wisdom; and once selected, the personological approach recommends a collection of integrative exemplar data, including interviews, assessments, and surveys (Orwoll & Perlmutter, 1990).

The result of this approach is a mixed-methods study that incorporated semi-structured interviews, self-report quantitative measures, and a demographic questionnaire. Questions pertaining to the lives, opinions, and wisdom-related characteristics and qualities of exemplars were gathered from a review of relevant literature and present investigator interest, and served to elucidate the nature of wisdom exemplars.

The quantitative measures of the mixed design consisted of the Self-Assessed Wisdom Scale (SAWS), Foundational Value Scale (FVS), State-Trait Anxiety Scale (STAI), Spiritual Perspective Scale (SPS), Loyola Generativity Scale (LGS), Mindfulness Awareness Attention Scale (MAAS), Satisfaction With Life Scale (SWLS), Narcissistic Personality Inventory (NPI-16), Humility Inventory (HI), Big Five Personality Inventory (BFI), Washington University Sentence Completion Test (WUSCT), and a demographic questionnaire. These measures were used in the attempt to operationalize exploratory characteristics, assess exemplar qualities seemingly associated with wisdom, compare exemplars' mean scores to the norm, and investigate factor correlations. Instruments were also used to provide converging evidence about exemplars with the belief that this approach will provide meaningful data.

### *Conclusion*

It has been eloquently stated that the word wisdom exists as “the capstone of knowledge about the human condition and about the means and ends of life” (Baltes, 2004, p. 10). Considering both the daunting crises facing the global community (e.g., energy consumption, climate change, population growth, economic decline) and wisdom's generative potential for human flourishing, a modern context has been put forth for its continued investigation. As some (Ardelt, 2000a; Orwoll & Perlmutter, 1990) claim that exemplars embody wisdom itself, and others (e.g., Baltes, 2004) that wisdom is the peak of excellence in human and collective

development, it seemed pertinent to learn about exemplars lives, garner their perspectives and experiences, and explore the results of their data.

Scholarly research into wisdom has yet to examine exemplars, and they, and their perspectives, remain urgently needed. Trowbridge reflects (2005), “The particular value of studying exemplars carefully is that they can show us the way to wisdom” (p. 248). While it is likely that multiple paths showing the way toward wisdom’s realization exist, the lives, opinions, and characteristics of exemplars seem promising avenues for the future of this quest, if not the world itself.

## Chapter 2: Review of Relevant Literature

It is with a slight sense of embarrassment that we embark on this task of writing about wisdom. Wisdom has the alluring aura suggesting that those who dare write about it must be to some extent wise. We would like to relinquish any claims to that effect at the outset, and, relieved of the burden of appearing wise, start to analyze this important and interesting phenomena with the conceptual tools of the social sciences. (Csikszentmihalyi & Nakamura, 2005, p. 220)

### *General Overview*

The review of the literature on wisdom and exemplars is presented in six sections, beginning first with Section 1, which is a commentary on omitted literature, organizational rationale, and researcher qualifications. Section 2 includes a review of the psychological and philosophical definitions of wisdom, and to this context, theoretical and psychological models are presented and critically assessed in Section 3. In Section 4, personal wisdom-related qualities precede the presentation and evaluation of empirical studies most relevant to the study of exemplars. Finally, the previous five sections are summarized and the relevance of the current study revisited.

### *Literature Omissions, Organizational Rationale, and Researcher Qualifications*

#### *Literature Omissions*

This literature review will be nuanced by engaging briefly with the heritage of wisdom. However, the scope of this investigation does not permit thorough attendance to many materials outside the field of psychology, including that of various historical, philosophical, theological, spiritual, and cultural dispensations. Trowbridge (2005) points out that this paucity of interdisciplinary dialogue is shared by the current state of psychological wisdom scholarship and the study of wisdom in general. Toward its resolution, Baltes (2004) of the Max Planck Institute, perhaps the world's foremost empirical researchers of wisdom (Ardelt, 2004b; Sternberg, 2004), wrote, "In this new stage of wisdom scholarship, wisdom will have been lifted from the hands of

philosophers, religious scholars, and humanists to a new plane of collaboration and transdisciplinary discourse” (Baltes, 2004, p. 10). Until the fruits of the coming era are realized, however, this study will remain necessarily incomplete. For a more comprehensive review of wisdom conceptions, see Birren and Svensson (2005), W. Brown (2000), Brugman (2006), Robinson (1990), Sternberg (1990), Sternberg and Jordan (2005), and Trowbridge (2005, 2011).

### *Organizational Rationale*

Additionally, exploratory factors like openness, spirituality, generativity, life satisfaction, humility, and mindfulness will be succinctly defined and organized under personal qualities associated with wisdom. This decision is driven by the present study’s scope and informed by the hypothesis that these qualities might be considered necessary, but perhaps not sufficient, in illuminating the nature of wisdom (Baltes et al., 1995). Because emotional and clinical factors have rarely been addressed in wisdom research (Ardelt, 2000a; Robins, 1998), factors such as anxiety, stress, and narcissism will also be mentioned in this section, and are hypothesized to have an inverse relationship to both wisdom and exemplar characteristics. Resources for more in-depth investigations into each area will be provided.

### *Researcher Qualifications*

A third limitation involves the presentation of wisdom-related material included in this review. Meacham (1990), in the first published book reviewing psychological conceptions of wisdom (Sternberg, 1990), modernizes Confucius by defining wisdom as the balance between knowing what one does and does not know. Applying this rationale to the current context, it becomes clear that this researcher’s accounts of wisdom’s definitions, theoretical conceptions, and empirical models are limited to the assimilation and understanding of his current capacities. Readers may discover more illuminating perspectives and are encouraged to not be confined by

interpretations herein. As pointed out earlier, Sternberg (1990) reminds us that wisdom is not only the most elusive of constructs, but its understanding, fully and correctly, necessitates more wisdom than any of us have.

Finally, it is the intent of this researcher to “avoid putting an explicit theory of wisdom forth and then testing and revising it” (Lyster, 1996, p. 170), thus limiting wisdom to some truncated, partial operationalization of itself. Lyster writes, “Given wisdom’s long history and complexity any empirical attempt to investigate wisdom is an ambitious undertaking which is bound to fall short of adequately defining and exploring the meaning of the construct” (1996, p. 171). However, the challenge also exists to measure wisdom in a manner that would render it amenable to statistical analysis. As mentioned earlier, one goal of this study is to generate a more comprehensive understanding of wisdom while simultaneously employing an existing wisdom construct. The author does not contend that the selected conception, while viable, represents wisdom fully, but is rather utilitarian, economical, and amenable to budget and time constraints. Much discernment has surrounded the selection of a wisdom theory and measurement with an understanding of its inherent limitations. This will be discussed later in this chapter.

### *Defining Wisdom*

As previously mentioned, a discussion of proposed wisdom definitions is presented as a necessary context for the main focus of this study: exploring the lives, opinions, and wisdom-related characteristics of exemplars of wisdom. Following the protocol of experts in the field (e.g., Sternberg, 1998, 2001c) a dictionary definition will be presented first. Wisdom will then be defined as multidimensional, aimed toward the good life and the common good, and as the management of uncertainty. Other wisdom definitions previously mentioned (e.g., expertise, seeing through illusion, integration, personal components) will be further defined in the



following sections of this chapter (e.g., theoretical psychological models and personal conceptions of wisdom). The current section will employ an integrative and succinct approach toward defining wisdom and its relevance to exemplars. The words of Baltes (2004) seem apropos in this endeavor, “Because of its rich and varied meanings, defining wisdom as a scientific construct will not be easy” (p. 8).

### *Dictionary Definition*

Existing across centuries in German, Old English, and Greek, the word wisdom is based on the Indo-European word to see or to know, *wede* (Holliday & Chandler, 1986). Some theorists (Bluck & Gluck, 2004) contend cultural and historical resonance with this term, while others (Baltes & Staudinger, 1993) point out that no criteria are absolute in defining wisdom, but that its core concept should contain everyday beliefs about wisdom.

Philosopher John Kekes (1983) recommended beginning with a dictionary definition for intuitive understandings of the term. Contemporary empirical expert Sternberg (1998, 2001c) accepted a dictionary definition as well: “The power of judging rightly and following the soundest course of action, based on knowledge, expertise, and understanding” (pp. 227, 347). Following the example of many leading researchers, a consultation of the English dictionary is presented:

Wisdom (n):

1. Accumulated knowledge or erudition or enlightenment.
2. The trait of utilizing knowledge and experience with common sense and insight [ant: folly].
3. Ability to apply knowledge or experience or understanding or common sense and insight.

4. The quality of being prudent and sensible [ant: unsoundness].
5. An Apocryphal book consisting mainly of a meditation on wisdom; although ascribed to Solomon it was probably written in the first century BC [syn: Wisdom of Solomon] (Wisdom, 2011).

### *Multidimensional*

While these terms (e.g., erudition, enlightenment, insight) require further clarification, the multiform nature of wisdom (as a book, quality, utilized knowledge) evidenced in this definition resonated with Deidre Kramer (1990) and others. Kramer posits that defining wisdom requires recognition of its five interrelated but separate functions: solution of problems confronting the self; advising others; management of social institutions; life review; and spiritual introspection. Others define wisdom through categorization, including the three senses of Chandler and Holliday (1990), those being practical, philosophical, and abstract and spiritual, as well as the three aspects of Juan Pascual-Leone (1990), those being wisdom as will within vital reason, as valid existential counseling, and as empathic experiencing of other or nature. While not fully defined and operationalized here (but in later sections of this chapter), these distinctions are relevant with regard to the inquiry of exemplars, as they aid in capturing and delineating the multifaceted nature of its expression.

### *Good Life and the Common Good*

Trowbridge (2005) writes, “Wisdom is often said to aim at the best possible life, the best possible belief, choice, or action” (p. 46). The lives and opinions of exemplars present the potential opportunity to validate and compare the following definitions toward this end, both implicitly and explicitly. Ardel (2004b) defines wisdom as insight into the purpose and meaning of life, as does Kekes (1995), who calls wisdom interpretive knowledge, knowing the

significance of facts. Baltes and Staudinger (1993) put forth that wisdom is an expertise that addresses difficult and important questions and strategies about the conduct and meaning of life, requiring exceptional judgment and knowledge, particularly about the limits of one's knowledge. Meacham (1990) concurs, defining wisdom as the balance between knowing what one knows and what one does not know. Lehrer and Smith (1996) attribute an understanding of the worth of things to a wise person, and Bluck and Gluck (2004) define wisdom as involving not just what, but how, one thinks through experiential knowledge, cognition, affect, and action directed toward the goals of striving for the common good and living a good life.

Similarly, Sternberg (1998) contends that wisdom is a rare gift, and provides the when-, where-, how-, whom-, and why-application of knowledge. Reflectiveness, defined as thinking before acting, and judgment—or insight into ends, goals, and priorities—are the two most-often identified traits of wisdom defined by Blanshard (1967). W. Brown (2000) suggests that wise people are able to see the essence of a problem and offer meta-strategies for how problems are to be solved. Trowbridge (2008) defines wisdom as making the best possible choice through perceiving reality.

### *Management of Uncertainty*

Brugman (2006) identifies the core of wisdom as “acknowledging uncertainty, which fosters a more flexible attitude towards information” (p. 454). Clayton (1982) defines wisdom as “the ability to grasp human nature, which is paradoxical, contradictory, and subject to continual change” (p. 315). Robins (1998, 2007), promulgates an interdisciplinary theory of wisdom that posits that wisdom provides a systems view of events, acknowledges the inherent uncertainty in life, and fosters humility in recognizing that one's perceptions of events are relatively tentative and subjective. It also includes more realistic cognitions, mindfulness, and emotional

intelligence. Linley (2003), like Baltes (2004), defines wisdom as the recognition and management of uncertainty, the integration of affect and cognition, and the acceptance and recognition of human limitations.

### *Conclusion*

Proposed wisdom definitions were briefly presented as a necessary context for researching exemplars with the caveat that defining wisdom is inherently complex (Baltes, 2004). Recall that wisdom was first conceptualized as multidimensional, containing both interrelated and separate functions that include self, other, and world considerations via philosophical, spiritual, and practical perspectives. Wisdom was then defined as aimed toward the common good and the good life through knowledge, reflection, insight, and action in the conduct and meaning of life; perceiving meta strategies towards problem solving; and the use of exceptional judgment. Finally, wisdom was presented as the management of uncertainty, or the ability to embrace humility and the limitations of being human that paradoxically fosters a deeper flexibility and openness toward oneself, others, and the world.

Despite these advances in defining wisdom over the last quarter century of researching wisdom, Ardel (2005) points out that “we might be getting closer to a commonly and generally agreed upon definition” (p. xii), although there is still no consensus. Convergence seems to occur around the conception of wisdom as multifaceted, integrative, and aimed toward what is individually and collectively good.

On the whole, the proposed definitions lack both the implicit and explicit expertise of exemplars. Yet the wise are essential to an understanding wisdom from both theoretical and material perspectives. Trowbridge writes (2005), “Without this phenomenological evidence, the study of wisdom will remain abstract” (p. 257). These wisdom conceptions are particularly

relevant for the current study as they can be compared to: (a) nominator rationales for exemplar selection, (b) the concurrent wisdom related qualities that appear on the Foundational Value Scale (FVS), and (c) exemplars' notions of wisdom.

More broadly, support for the actualization of wisdom is evidenced by the Arête Initiative at the University of Chicago, which in 2008, was offering 2 million dollars in grants to researchers with innovative studies geared toward defining wisdom. Considering this, is it possible that exemplars might serve to concretize, operationalize, and make accessible this much-needed heuristic (Baltes & Staudinger, 2000)? Can a life aimed toward the common good—a challenging and relative concept to define—be better understood by studying exemplars? Could they reveal decision-making strategies and methods of tolerating uncertainty that elude the rest of us, or perhaps share what is most meaningful to them? These questions have yet to be examined in the psychological study of wisdom with exemplars.

#### *Theoretical Psychological Models of Wisdom*

Further defining, conceptualizing, and operationalizing wisdom—as well as discerning what can be learned by way of studying exemplars—can be accomplished by a review of existing contemporary psychological and theoretical models. Criteria for models selected by this researcher included empirical support and rigor, thorough and complex treatment of wisdom, relevance to exemplars, and the guidance of former dissertation chair Shani Robins (personal communication, June 17, 2007).

As an important caveat, Lyster notes (1996):

The folk (common persons') approaches offer a broad and detailed formulation of descriptions of wise people but fall short of specifying what wisdom is. Performance approaches offer more in the way of understanding wisdom-related processes, but due to their focus on wisdom as product they have neglected central dimensions of wise people. (p. 154)

In an attempt to make less disparate these approaches, each wisdom theory will be followed by its account of wise persons themselves. Models will first be presented and then critically evaluated.

### *The Berlin Wisdom Paradigm*

Contemporary theoretical and empirical investigations in the psychological concept of wisdom have been led by researcher Paul Baltes at the Max Planck Institute of Human Development (Ardelt, 2004a; Baltes, 1987, 2004; Baltes & Smith, 1990; Sternberg, 2004). Conceptually derived from the psychological lines of expert human performance and knowledge, positive aspects of the aging mind, conceptions of intelligence dealing with the pragmatics of daily life, and cultural-historical definitions of wisdom, Baltes endeavored to interconnect these research avenues into an integrative and empirical psychological theory of wisdom (Baltes & Smith, 1990; Staudinger & Leipold, 2003).

Motivated in part by the explicit commitment to understand what might be positive in adult aging and development, the Berlin Group defines wisdom as “expertise in the conduct and meaning of life” (Baltes & Staudinger, 2000, p. 122), or expert knowledge in the fundamental pragmatics of life. “Fundamental pragmatics” (2000, p. 122) refers to judgment and knowledge concerning the essence of the human condition, as well as ways and means of “planning, managing, and understanding a good life” (p. 122).

Geared toward a well-balanced coordination of emotion, cognition, and motivation the fundamental pragmatics of life domain is utilized as criteria for the operationalization and qualitative evaluation of wisdom-related knowledge (Baltes et al., 1995; Staudinger & Leipold, 2003). The first two criteria, rich factual and procedural knowledge, are considered necessary but not sufficient to defining wisdom (Baltes & Staudinger, 2000). Rich factual knowledge about life

includes topics such as human nature, critical events in life, and knowledge about coordination of the well-being of oneself and others. Rich procedural knowledge includes strategies and heuristics for dealing with the meaning and conduct of life, giving advice, and weighing life goals (Baltes & Staudinger, 2000).

The remaining three criteria—lifespan contextualism, relativism of values and life priorities, and management of uncertainty—are considered more unique and specific to the fundamental pragmatics of life domain (Baltes et al., 1995). They are hypothesized to develop later than the previous two and are conceptualized as meta-criteria. Operationally, lifespan contextualism is knowledge that considers interrelations between the many themes and contexts of life (Baltes & Staudinger, 2000). The relativism of values and life priorities includes the acknowledgement and tolerance of value differences and an explicit concern with virtue and the common good. The recognition and management of uncertainty includes the constrained validity of human information processing, access to parts of reality, exclusively, and the inability to know the future.

The Baltes Berlin Group framework and the methods used to identify wisdom-related knowledge in terms of a family of criteria are “not restricted to the use of life dilemmas and the discourse products of individuals, that is, wise persons” (Baltes & Smith, 1990, p. 114). In essence, individuals have wisdom, but they are not wisdom, and thus wisdom is theorized to develop through multiple constrained pathways that work together synergistically (Baltes & Staudinger, 2000).

Accordingly, the Berlin Group has focused on searching for manifestations of wisdom in individual minds by asking for participants’ responses to various life problems (Baltes & Staudinger, 2000). They have identified four primary theoretical conditions under which wisdom

is likely to develop: (a) the intense process of learning, motivation, and practice to strive towards excellence, (b) a collaboration of micro and macro factors, (c) the orchestration of cognitive, motivational, social, interpersonal, and spiritual characteristics, and (d) guidance by mentors or other wisdom-enhancing voices as well as the mastery of critical life experience (Baltes & Staudinger, 2000).

The Berlin Group model also conceptualizes wisdom as both a heuristic, or a highly organized and automated strategy for directing search processes for organizing and using information in a certain class of situations, and a meta-heuristic, or a heuristic that efficiently organizes the ensemble of more specific heuristics that are available to individuals in planning, managing, and evaluating issues surrounding the fundamental pragmatics of life (Baltes & Staudinger, 2000). Specifically, wisdom as a meta-heuristic serves to organize, orchestrate, optimize, and integrate knowledge toward human excellence in mind and virtue, both individually and collectively. According to the Berlin Group paradigm, “wisdom is the embodiment of the best subjective beliefs and laws of life that a culture and individuals have to offer” (Baltes & Staudinger, 2000, p. 134).

People with higher wisdom-related performance scores, according to Staudinger, Dornier, and Michler (2005), seem to be growth oriented, open, moral, creative, and do not show judgmental and conservative thinking styles. They are socially competent, interested in the psychological functioning of others, are engaged in the world while retaining a sense of serenity, and are oriented toward the well-being of others and society rather than solely focused on their own pleasure (2005, p. 201).

As the pioneering conception for the objective study of wisdom, empirical support for this model spans decades (e.g., Kunzmann & Baltes, 2003; Staudinger, Smith, & Baltes, 1992).



Trowbridge (2005) contends that wisdom conceptualized as both a heuristic and as expertise are its most original contributions. Limitations include overemphasis on cognition and knowledge, the exclusion of emotions, the exclusion of wisdom as doing and being; the absence of operationalizing and defining value-laden terms like human condition, good life, and common good; and concerns of ecological validity and application. Ardel (2004a) also argues that the Baltes notion of wisdom as an expert knowledge system is abstract, hypothetical, and conceptual, while wisdom as-applied is more context-dependent and individualized. Further limitations will be elucidated later in this chapter.

*Ardelt: Cognitive, Reflective, and Affective Integration*

Monika Ardel (2004b), arguably the most respected empirical and non-solely cognitive-based researcher in the psychological study of wisdom (Sternberg, 2004), grounded her three-dimensional model of wisdom on the research of Clayton and Birren (1980), Kramer (1990), and Eastern wisdom traditions. She defines wisdom as the integration of cognitive, reflective, and affective personality characteristics.

Ardelt's model includes a cognitive dimension of wisdom, which she defines as the desire for a deeper understanding of life and to know the truth, specifically with regard to interpersonal and intrapersonal matters. It includes the inherent limitations of knowledge, acceptance and knowledge of the positive and negative aspects of human nature, and of life's unpredictability and uncertainty.

The reflective component of her model of wisdom represents self-awareness, self-insight, self-examination, and the capacity to take multiple perspectives of phenomena (Ardelt, 2004a). Self-reflection practice informs an undistorted comprehension of reality by facilitating an awareness and transcendence of one's projections and subjectivity.

The affective component of wisdom consists of a person's compassionate and sympathetic love for others (Ardelt, 2000b). A reduction in self-centeredness is likely the result of overcoming one's projections and subjectivity, allowing deeper insights into the behavior and motives of others. Ultimately, this shift allows "a wise person to interact with people in a more constructive, sympathetic, and compassionate way" (2004b, p. 276).

Ardelt (2000a) emphasizes that the nature of wisdom-related knowledge is spiritual and searches for answers to the meaning and purpose of life and the human situation in particular. Because wisdom affects a person's most basic assumptions, it is necessarily personal, concrete, applied, and involved. It cannot exist or be preserved "outside of individuals, and is appropriately measured by how close people come the theoretically constructed ideal type of a wise person" (Ardelt, 2004a, p. 306).

Essentially, the development of wisdom "requires a willingness to learn from life's lessons and be transformed in the process" (Ardelt, 2004b, p. 276). She further contends, "the goal of wisdom-related knowledge is not to change the external world but to change the inner world of the knower" (p. 276). Thus, one cannot be an expert in wisdom or a carrier of wisdom related knowledge without being wise.

Ardelt should be credited for bringing attention to the emotional dimensions of wisdom and advancing the study of wisdom through personal components (S. Robins, personal communication, July 17, 2007). Her proposed wisdom antecedents and three-dimensional wisdom scale are helpful in assessing the validity of her model. Ardelt's primary weaknesses include a lack of empirical rigor and a somewhat idealistic and parsimonious wisdom model. She neglects defining and operationalizing terms like spirituality, and seems to minimize the cognitive component of wisdom. Finally, it was noted (Trowbridge, 2005) that while reflective

thinking and diminished ego-centeredness lead to increased empathy, it might be just as likely that the starting point is with caring, and the resulting empathy leads to self-reflection and expanded recognition and awareness.

*Robert Sternberg: Balance Theory of Wisdom*

Based on an integrative relationship between implicit theories of wisdom, tacit knowledge, and practical intelligence (maximizing practical outcomes), Robert Sternberg (1998) posits a balance theory of wisdom. The balance theory is grounded in tacit knowledge, which refers to a “knowing how” as opposed to “knowing that,” is conceptualized as action oriented, and is acquired without direct assistance from others. Wisdom is developed through role models and the incorporation of dialectical thinking.

Sternberg (1998) defines wisdom as the

application of intelligence, creativity, and knowledge to the common good by balancing intrapersonal (one’s own), interpersonal (others’), and extrapersonal (institutional or other larger) interests over the long- and short-terms, through the mediation of values, so as to adapt, shape, and select environments. (p. 347)

Thus, wisdom is linked to the interaction between a context and an individual toward the common good. In previous work, (Sternberg, 1985, 2001a) six components of wisdom emerged: sagacity, reasoning ability, learning from environment and ideas, judgment, expeditious use of information, and perspicacity. Sternberg conceptualizes wise people as those who are comfortable with ambiguity, endorse a judicial thinking style, seek the truth to the extent that it is knowable, are able to understand other people’s cognitions, motivations, and affects, and consider the implications to others when rendering a solution. Sternberg (1998) emphasizes wisdom as metacognition, or a knowing that one does not know everything; the output of wisdom is, typically, a piece of advice.

Limitations of the balance theory include positing the goal of wisdom toward the common good without defining what the common good means. Sternberg (1998), writes, “I do not believe it is the mission of psychology, as a discipline, to specify what the common good is or what values should be brought to bear in what proportion towards its attainment” (p. 356). This perspective is also shared by Baltes (2004), “I will for the most part remain silent when it comes to a specification of the values or goods to consider or avoid” (p. 37). Trowbridge (2005) also points out that values also present a problem for Sternberg (1998): “People have different values mediating their utilization of tacit knowledge in the balancing of interests and responses” (p. 357). As an antidote, Trowbridge suggests an exploration of the values of exemplars to see if they are similar or even the same. Regarding the notion of balance, there is no mention of spirituality and no rationale is given for its basis in a person-context.

*Shani Robins: Interdisciplinary Model of Wisdom*

Robins (1998, 2008) proposes an interdisciplinary and integrative wisdom model that includes clinical dimensions as well as transpersonal, cognitive, personality, and life span development components and processes. According to this model, “wisdom includes factual knowledge about the world, and procedural knowledge in acting on the world in a way that resolves problems and conflicts” (Robins, 2007, Wisdom Therapy Institute, Introduction, para. 2). Accordingly, wisdom provides for a systems view of events, acknowledges the inherent uncertainty in life, and fosters humility in recognizing that one’s perceptions are relatively tentative and subjective, ultimately facilitating a reduction in neuroticism and openness to experience.

Robins (2007) has also developed Wisdom Therapy, which is an integrative and interdisciplinary synthesis of humility training, meditation, modern cognitive behavioral

techniques, relaxation practices, and problem-solving perspectives associated with wisdom, transpersonal, and humanistic traditions. The aim of wisdom therapy is to both facilitate and balance emotional and cognitive development that is typical of later life within a systems-wide intervention. Robins (2007) writes,

Wisdom is related not just to the expectations, beliefs and the consequent emotional reactions resulting from beliefs, but also to the cognitive, behavioral, physiological, interpersonal, familial and social components that originate from and contribute to beliefs, all of which intimately and dynamically interact and thus co-evolve together across our adult development. (Wisdom Therapy Institute, Goals, para. 1)

In addition to the development and treatment of the ego, and consistent with Buddhist Psychology (Epstein, 1995), Wisdom Therapy simultaneously aims to facilitate the transcendence of the ego. Empirically, the facilitation of wisdom-related dimensions by Wisdom Therapy interventions has been shown to reduce the intensity and frequency of anger while also reducing self-centeredness (Robins, 1998).

Strengths of the model include comprehensive and interdisciplinary components with traceable, empirically validated lineages; immediate application and ecological validity; potential for the explicit facilitation of wisdom-related processes through Wisdom Therapy; and the inclusion of spiritual dimensions. As well, the Robins (2008) model appears to most closely embody the transdisciplinary vision for wisdom mentioned earlier in this chapter (Baltes, 2004). Limitations include a lack of empirical scrutiny, questionable validity, and limited publication for peer review.

### *Transcendent Wisdom*

Le and Levenson (2005) consider wisdom a developmental process involving self-transcendence. Self transcendence is defined as (a) the ability to move beyond self-centered consciousness, (b) to see things as they are with a clear awareness of human problems and

human nature, and (c) to have a considerable amount of freedom from social and biological conditioning. Le (2008b) also defined transcendent wisdom as insight into reality. Transcendent wisdom reflects a transcendence of the self, or the subjectivity, biases, and self-centeredness that are predominant in human experience. Wink and Helson (1997) define transcendent wisdom as philosophical or spiritual insight, freedom from narrow self-concern, and recognizing the contextual nature of knowledge and its limitations. Helson and Srivastava (2002) identified transcendent wisdom as having an abstract quality suggesting that it is insightful, transcends the personal, recognizes the limits of knowledge, is complex, integrating, and demonstrates spiritual or philosophical depth.

Transcendent wisdom is certainly a departure from the psychological wisdom literature's primarily practical conceptions, however, what is meant by insight into reality and freedom from conditioning are not yet clearly defined. Trowbridge (2011) also notes that the transcendent wisdom conceptions merely begin to hint at sophaic potentials.

*Csikszentmihalyi and Rathunde: Evolutionary Hermeneutics*

Csikszentmihalyi and Nakamura (2005) put forth an evolutionary theoretical approach to understanding wisdom called evolutionary hermeneutics (EH). EH is based on an understanding of wisdom through the ages, with the idea that historical concepts relating to the evaluation of human behavior have adaptive value for humankind (Sternberg, 1990).

Their conception of wisdom is threefold. First, wisdom is characterized as a cognitive process, or the attempt to have worldly understanding from a disinterested perspective; it seeks to understand the ultimate consequences and causes of events while preserving their knowledge and integration. Second, wisdom can provide a compelling guide to action as a virtue; it provides the opportunity for life improvement by achieving a closer resonance with the laws of the human

universe through ordered actions (Csikszentmihalyi & Rathunde, 1990). Finally, wisdom can be conceptualized as a personal good, or as an “intrinsically rewarding experience that provides high enjoyment and happiness when a person reflects on the connection between events in a disinterested way” (Sternberg, 1990, p. 4). Together, these three aspects are thought to contribute to a cultural revolution and an alternative to extrinsic pleasure and materialism.

Traits of a wise person include empathy, intelligence, and reflection, and wisdom’s products choosing between our needs and environmental options (Csikszentmihalyi & Nakamura, 2005). Trowbridge (2008) notes the similarity between these traits of a wise person and those of Ardel (2000a). Primary limitations include a lack of empirical research.

*McKee and Barber: Seeing Through Illusion*

McKee and Barber (1999) suggested that at its core, wisdom is found in “seeing through illusion” (p. 151). Wisdom is comprised of three factors: clear insight that a belief is illusory, freedom from future vulnerability to the error or illusion, and empathy towards those who still subscribe to the illusory belief. This notion overlaps with Robins’ (2007) use of visual illusions as a tool to facilitate this awareness. Robins writes, “Given our certainty and arrogance regarding what we visually see as ‘reality,’ visual illusions serve to shake up that arrogance and facilitate a humility regarding not only what we see, but bridging that over towards uncertainty and humility regarding what we think, expect, and believe” (personal communication, July 24, 2008). The McKee and Barber (1999) wisdom conception also emphasizes a distinction between empirical, or a definition of wisdom based on observation, and a priori, a definition derived from intuitive insight.

Like Sternberg (1998), McKee and Barber (1999) suggested that the essence of wisdom lies in knowing how, not just knowing what. In this sense wisdom is more than the accumulation

of facts, but the capacity to apply knowledge procedurally and contextually towards the good of self and others. Trowbridge (2005) notes the resonance between the McKee and Barber (1999) conception and many definitions proposed in earlier times—particularly the definition espoused by Hugh of St. Victor, the 12th-century Catholic philosopher: the comprehension of things, just as they are, is wisdom. While seeing through illusion seems essential as a component of wisdom, this alone is too broad, and can be applied to other non-wisdom behaviors like critical thinking, decision-making, and conflict resolution (Trowbridge, 2005). Seeing through illusion also presumes that illusion can be accurately discerned, particularly in a world of plurality and multiculturalism.

Trowbridge comments:

Wisdom *is* seeing through illusion, and this is a task impossible in principle for humans. This is a very rich definition, quite related to knowing yourself, which might be considered the theme of Western wisdom, the thread that leads from the beginning to the present, tying it all together. Along with perceiving the divine plan. The subtheme is making the best choices (*phronēsis*). (personal communication, October 4, 2008)

*Webster: Wisdom as Multidimensional*

Jeffery Webster (2003, 2007) proposed a multidimensional wisdom-construct partially operationalized by the Self-Assessed Wisdom Scale (SAWS). The SAWS is now a 40-item Likert measure conceived in 2003 to assess “dimensions of wise persons themselves” (2003, p. 13). Webster envisioned giving the test to people nominated as wise, and Trowbridge (2005) suggested interviewing people who score highly to learn more about them and about the quality of their wisdom. Staudinger et al. (2005), a former member of the Berlin Group, also reflected that the “SAWS appears to measure something like personal wisdom” (p. 212). For the current study, Webster’s model has been selected to operationalize wisdom for the purposes of assessment and comparison. Reasoning for this decision follows this review, which is more



thorough than the previous conceptions presented. Construct validity, reliability, additional relevance, and measure specifics will appear in the following chapter.

Wisdom is defined as “the *competence* in, *intention* to, and *application* of, *critical* life experiences to facilitate the *optimal* development of *self* and *others*” (Webster, 2007, p. 164). Describing competence, intention, application, critical experience, optimal development, self, and others within the real-life context of wise people can further elucidate this working definition.

First, “competence” in a wise person is understood to be the minimal level necessary for decision-making, problem solving, and other forms of intellectual abilities, similar to the notion of expertise in the fundamental pragmatics of life (Webster, 2007). Second, wise persons are also “mindful” (e.g., Langer, 1989) in that they deliberately “intend” wisdom-related consequences from their actions. Third, wisdom is thought to be forged in the exigencies of real life and emerges from grappling with “critical” life events, not the mundane, trivial minutiae of daily life. Fourth, “reflections” upon such key occurrences enable wise individuals to set goals in multiple life endeavors (e.g., personal, career, health, leisure, artistic, spiritual) which contribute to “optimal” growth, that is, the realization of full potential (akin to Maslow’s notion of self-actualization). Fifth, wise individuals do not hoard their hard-earned secrets of successful and fulfilling life and are not sage misers; rather, they share these valuable insights and seek to engage others within their broader community—wise individuals, therefore, are concerned with both “self and others.”

In essence, Webster’s (2007) intent was to assimilate intellectual capabilities put forth in other conceptions (e.g., Berlin Group) within a broad framework of social, motivational, emotional, and intrapersonal dimensions. Five domains are included and will be defined. They

are Openness, Emotional Regulation, Humor, Critical Life Experience, and Reminiscence and Reflectiveness.

*Openness.* Openness, as it pertains to wise persons, concerns not only the interior landscape of mental life but also an orientation to the press and strains of the external world (Webster, 2007). Wise persons entertain and nurture the creative train of dreams, ideas, wishes, and thoughts without censure. Further, this openness extends to the variety of emotional experiences that accompany both private and public transactions. Wise persons have the “capacity to fully appreciate these rich, often powerful, internal experiences without feeling overwhelmed; rather, their ability to manage these subjective states is considered to be another important dimension of wisdom” (2007, p. 166). More about openness will be said in the following section of this chapter.

*Emotional regulation.* For a variety of researchers (e.g., Ardel, 1997, 2000a; Birren & Fisher, 1990; Chandler & Holliday, 1990; Clayton & Birren, 1980; Kramer, 1990; Orwoll & Perlmutter, 1990; Robins, 1998; Sternberg, 1998), affect sensitivity and emotional regulation are core components of wisdom. The emotional dimension of wisdom involves a complex blend of the range of human affect and an exquisite sensitivity to subtle nuances and gross distinctions. Webster (2007) writes, “Recognizing, embracing, and employing emotions in a constructive and creative way is a benchmark of wisdom” (p. 166). The appropriate use of emotions spans the spectrum from frustration, rage and grief to joy, happiness, and ecstasy. Webster contends that a “corollary, if not consequence, of such emotional integrity is the development of a particular sense of humor concerning life’s vicissitudes” (p. 166). Robins’ (1998) inclusion of Emotional Intelligence and description of “lightness” overlaps with these conceptions of emotional regulation and humor.

*Humor.* Webster (2007) cites Damon (2000), Erikson (1963), Frecknall (1994), Taranto (1989), and Vaillant (2000) in conceptualizing humor as the rare ability in wise persons to reflect fearlessly on the strange institutions and customs man uses to find self-realization. The wise person is able to use humor for irony, social bonding, stress reduction, and as a reminder to not take themselves too seriously. Webster contends that it provides an emotional anecdote to the subjective distress of critical life events and reinforces openness.

*Critical life experience.* Webster (2007) writes, “The crucible of wisdom consists of the turmoil and uncertainty inherent in many life decisions” (p. 167). Less-than-ideal, morally ambiguous, and multifaceted situations with unforeseeable outcomes are examples, including end-of-life decisions, career choices, and relationships. Webster balances these difficult experiences with a positive focus, noting that the powerful, awe inspiring, and peak experiences that contribute to peace, serenity, happiness, and psychological well-being are also recognized, cultivated, and treasured by the wise. Disturbing and problematic episodes that require intense attention over long durations, however, engage people with tasks of meaning-making.

*Reminiscence and reflectiveness.* Reflection and evaluation are essential to the transformation of critical life experience to wisdom, according to Webster (2007). Citing Bluck, Gluck, Baron, and McAdams (2005), Labouvie-Vief (1990), Pals (2006), and Staudinger (2001), wise persons are thought to utilize the reflective process to contribute to a more coherent narrative identity, derive insight from mistakes and successes, achieve a more balanced perspective, hone a set of relevant coping skills, reinforce a sense of self-efficacy in relation to important events, and prepare to confront similar issues in the future.

*Relevance revisited.* Ultimately, Webster’s construct and measure was chosen to operationalize wisdom for the current study of exemplars for these reasons: (a) it is both a

theoretical wisdom conception and is geared toward measuring dimensions of wise persons; (b) much of the previous wisdom work focused on conceptual discussions of wisdom (e.g., Ardelt, 2000a; Baltes & Staudinger, 2000; Horn & Masunaga, 2000; Kekes, 1983; Kramer, 2000; Pascual-Leone, 1990; Robinson, 1990; Sherman, 2000; Sternberg, 1998; Taranto, 1989) and yet lacked an actual measurement of its facets; (c) it attempts to address wisdom from the viewpoint of a multidimensional and integrative framework; (d) it can be compared to other measures empirically; (e) results have been replicated and extended; (f) it has strong reliability and promising, multiple forms of validity (i.e., construct, discriminative, predictive); (g) age was not correlated with wisdom; and (h) it is easy to administer and inexpensive.

Limitations include the acknowledgement that the five factors (i.e., openness, emotional regulation, humor, critical life experience, reminiscence and reflectiveness) are merely part of the wisdom construct but not fully representative of it. Particularly, humor is a less often mentioned in the psychological wisdom literature and spirituality has been omitted from this conception. Continued discriminative validity, for example, needs to be considered in the areas of creativity and intelligence, and this author questions whether wisdom necessarily originates in critical life experiences, and whether or not it is present in the minutiae of life.

#### *Additional Theoretical Models*

Other relevant theoretical psychological models mentioned but not thoroughly reviewed in the present study include Brugman (2000, 2006), Kramer (1990, 2000), Pascual-Leone (1990, 2000), and Trowbridge (2007). The perspectives of Erickson (1959), Jung (1959, 1967), and Kohut (1978, 1985) are also are also fecund ground for further exploration.

### *Conclusion*

Theoretical psychological models were put forth and evaluated to provide a richer context for the contemporary operationalization and defining of wisdom, with a focus on learning about the lives, opinions, and characteristics of exemplars. Conceptions were chosen based on empirical rigor, thorough treatment of wisdom, relevance to exemplars, and the guidance of former dissertation chair Shani Robins.

Wisdom was conceptualized by the Berlin Group as expert knowledge in the fundamental pragmatics of life, or ways and means of planning, managing, and understanding a good life. They found high wisdom-related performers to be growth oriented, open, moral, creative, socially competent, engaged with the world yet serene, and oriented toward themselves and the collective. Ardel (2004) conceptualized wisdom as the integration of cognitive, reflective, and affective personality components. Wisdom was defined as personal and concrete, with wise persons desiring to know the truth, accept unpredictability, and embody self-awareness, insight, and compassionate and sympathetic love for others.

Sternberg (1998, 2004) posited a balance theory of wisdom that applies intelligence, creativity, and knowledge to one's own, others, and worldly interests over time through mediating values and shaping environments. He claims the wise know not just what, but how; are comfortable with ambiguity; understand others ways of thinking, feeling, and motivation; and seek to know the truth. For Robins (1998), wisdom provides for a systems view of events, acknowledges the inherent uncertainty in life, and fosters humility in recognizing that one's perceptions are relatively tentative and subjective, ultimately facilitating a reduction in neuroticism and openness to experience. Transcendent wisdom was thought to involve self transcendence or the (a) the ability to move beyond self centered consciousness, (b) to see things

as they are with a clear awareness of human problems and human nature, and (c) to have a considerable amount of freedom from social and biological conditioning (Le & Levenson, 2005).

Csikszentmihalyi and Nakamura's (2005) Evolutionary Hermeneutics model put forth wisdom as virtuous action, intrinsically rewarding, and seeking to have worldly understanding from a disinterested perspective. Wise persons are intelligent, empathic, and reflective. McKee and Barber (1999) conceptualized wisdom as seeing through illusion, with wise persons having the capacity to apply knowledge procedurally and contextually towards the good of self and others. Finally, Webster (2007) posited a multidimensional wisdom construct defined as “the *competence in, intention to, and application of, critical* life experiences to facilitate the *optimal* development of *self and others*” (p. 164). Wise persons are thought to be open, able to regulate emotions, have a sense of humor, metabolize critical life experience, and be reflective.

Critically, many of the present models lack interdisciplinary synthesis and lineages beyond psychological theory. Furthermore, with the exception of Robins (2007) and Trowbridge (2008), the contemporary models and the last 35 years of psychological investigation into wisdom have primarily focused on defining and conceptualizing wisdom. Less traversed have been issues of ecological validity and potential application.

For example, Sternberg (2001a, 2001b, 2001c, 2004)—although others have debated it (e.g., Kuhn & Udell, 2001; Paris, 2001; Stanovich, 2001)—has made significant efforts toward the potential facilitation of the development of wisdom in education. Trowbridge (2008) has begun to make important contributions at the community and collegiate levels in recent years, putting forth his notions of the Wisdom-Centered Life. Robins (2008) briefly opened the Wisdom Therapy Institute in Palo Alto, California offering a model of psychotherapy that integrates practices of Western psychological science and Eastern traditions.

Can wisdom be learned? Is it something that can be taught? What conditions might facilitate its emergence? Gluck and Baltes (2006), taking a similar perspective as Robins (1998), posited that life experiences, emotional regulation, specific wisdom-related skills and ways of thinking, reflection, relationships with mentors, and studying philosophical literature could all be considered wisdom-enhancing interventions. In 2008, a 5-day Wisdom in Education conference took place in Mount Madonna, California, exploring, in part, the teachability of wisdom and the ancestral learning of wisdom in education. More recently, Jeste et al. (2010) found a consensus of experts felt that wisdom can be taught. What do exemplars think about this? Can wisdom be learned? This is a relevant and interesting line of questioning for exemplars.

Also of issue is the general omission of spirituality within these wisdom conceptions, and, where included, spirituality is not operationalized or defined (e.g., Ardel, 2000a; Baltes & Staudinger, 2000) with the exception of Ahmadi (1998, 2000) and Le (2008b). Is spirituality important to exemplars? What are their spiritual perspectives and spiritual lives like? What has informed these perspectives? Trowbridge (2005) writes, “wisdom cannot completely separate itself from religion or questions of ultimate meaning, so long as what is wise is connected with judgments regarding what is best for men and women” (p. 244).

Toward the unique value of researching exemplars, and in light of answering these questions, Trowbridge (2005) advances this notion,

Wisdom is a perspective, and a method of processing experience, that can be learned, even if not mastered, by all; it is to a large extent acquired deliberately and through reflection, and so people who are wise can be expected to be capable of articulating the nature of their wisdom. (p. 49)

Thus, might the lives and opinions of exemplars offer potential insight and clarity to these questions and models? Kekes (1995) contends that wisdom theories need to be revised if they do not resonate with those who embody it.

### *Personal Aspects of Wisdom*

Personal aspects of wisdom are relevant to an exploration of the lives, opinions, and characteristics of exemplars. It is hypothesized that these concepts will be useful variables for exemplar comparisons, potential avenues for wisdom-related learning, and as components of an emergent wisdom model.

In his critical review of the modern field over the last 25 years, Trowbridge (2005) identified 22 particular personal characteristics associated with wisdom. Because the parameters of this paper limit a comprehensive consideration, aspects most relevant to current research areas will be presented and reviewed. These include openness, insight, mindfulness, spirituality, generativity, humility, ego development, and life satisfaction. It is hypothesized that exemplars will show above average levels compared to the norm.

For the factors narcissism, anxiety, and stress, it is hypothesized that exemplars will show below average levels compared to the norm. Empirical measures will be employed to operationalize these constructs, some of which have yet to be used in the psychological study of wisdom. This list is by no means exclusive or exhaustive, and these qualities might be best considered necessary, but not sufficient, in characterizing wisdom (Baltes et al., 1995).

#### *Openness*

As previously mentioned (e.g., Webster, 2007), openness appears in the psychological wisdom literature as commitment to continuing development (Shedlock, 1998), avoiding narrow mindedness and self-deception (Kekes, 1995), and respect for individual differences and diversity (Labouvie-Vief, 1990). In 1997, researchers (Staudinger, Lopez, & Baltes, 1997) compared the scores of a heterogeneous group of people who had performed wisdom-related tasks with an array of personality and intelligence measures. Openness to experience was found



to be the single factor most highly correlated with wisdom. This was corroborated in another experiment (Staudinger, Maceil, Smith, & Baltes, 1998) that found only a person's experience and training in a particular profession to correlate higher with wisdom-related scores. Other researchers have also argued for the inclusion of openness (e.g., Arlin, 1990; Lyster, 1996; Taranto, 1989; Wink & Helson, 1997) as pointed out by Trowbridge (2005).

In the current investigation, openness will be operationalized by a factor in the Self-Assessed Wisdom Scale, Openness, as well as operationalized by the Big Five Inventory factor Openness to Experience. Webster defines openness as "ideas, values, and experiences, particularly those that may be different from one's own; willingness to sample novelty, appreciation of multiple perspectives which may be controversial, and tolerance of others" (2003, p. 16). More will be said about this measure in the next chapter. It was hypothesized that exemplars' average scores on the BFI Openness to Experience would exceed normative mean scores by at least 10%.

### *Insight and Mindfulness*

*Insight.* In the psychological wisdom literature, insight appears in multiple wisdom conceptions. Recall that Trowbridge (2007) defines wisdom as "profound insight into reality and making choices conformant with this insight, or perceiving reality and doing what is best" (Cultivating a Wisdom Perspective, para. 3). The Mckee and Barber (1999) notion of seeing through illusion also seems appropriate when conceptualizing insight. Csikszentmihalyi and Rathunde (1990) and Robins (1998) point out that the knowledge we have of the world at any given time is subjective, temporal, and partial.

In a similar way, wisdom for Labouvie-Vief (1990) consists of one's capacity to see the structures that relate to our common humanity beyond individual specialization and uniqueness.

For Achenbaum (2004), the wise, utilizing their ability to look upon the universe from several planes, seek insights about how their true nature evolves within themselves. Deriving more universal meaning from the cognitive ability to leverage one's understanding is insight, according to Kramer (2000). Webster (2007) says the wise are mindful and Pascual-Leone (2000) writes, "Any major mode of human processing that can lead to mindful ritualization should, when coupled to a suitable philosophy, yield a way to wisdom and transcendental self-development" (p. 243).

*Mindfulness.* Insight is a difficult aspect of wisdom to operationalize, and thus will be further explored and assessed by its association/relationship with a resonant concept, mindfulness. Mindfulness is defined as the process of cultivating insight (vipassana) which "is the understanding of the true nature of things" (Thera, 1975, p. 4) as they are from moment to moment.

Gil Fronsdal (2001), Soto Zen priest and Insight Meditation teacher, posits, "mindfulness is knowing what is happening in the present moment while it is happening" (p. 20). Jon Kabat-Zinn (1990), pioneer in the scientific applications of mindfulness in psychology and health benefits research, defines mindfulness as "paying attention, in a particular way, on purpose, in the present moment, and non-judgmentally" (p. 4). This kind of attention nurtures greater awareness, clarity, and acceptance of present-moment reality. Mindfulness teacher Bob Stahl (2008) puts forth that "mindfulness is about bringing clear, neutral attention to the present moment" (p. 1).

The foundations of mindfulness include mindfulness of the body, the contemplation of the physical body; mindfulness of feelings, the contemplation of feelings related to thoughts or

physical sensation; mindfulness of mind, the contemplation of mind states; and mindfulness of teaching, the contemplation of the universal laws of matter and mind (Stahl, 2008).

Beyond the illumination and facilitation of present awareness, mindfulness has been shown to allow one's attention to focus on "a wide range of thoughts, feelings, and experiences" (Teasdale, Segal, & Williams, 1995, p. 26). Mindfulness has been suggested to foster a greater connection with oneself, a greater connection with others, and with the greater whole (Shapiro & Schwartz, 2000). This may account for claims that Mindfulness is associated with empathy and compassion as well as with a systems perspective (Robins, 2008). Mindfulness is "the art of conscious living" (Kabat-Zinn, 1990, p. 7) and "opens the possibility of an awareness that clings to or resists nothing" (Fronsdal, 2001, p. 105).

As far as this researcher knows, no psychological wisdom literature to date has explored the relationship between mindfulness and wisdom, much less in relation to exemplars. The participants' level of mindfulness in the current study will be operationalized by the Mindful Attention and Awareness Survey (MAAS), which will be more extensively described in the next chapter. It was hypothesized that exemplars average scores on the MAAS would exceed normative mean scores by at least 10%.

For more information about the foundations of mindfulness and other Buddhist teachings, the reader can refer to Sumedho (2005), Thera (1972, 1975), Trungpa (1974), or Walshe (1890/1987). For a recent meta-analysis of mindfulness and its relationship to health benefits, see Grossman, Neimann, Schmidt, and Harald (2004).

### *Spirituality*

Trowbridge (2005) listed spirituality under other personal qualities related to wisdom, having concluded that the divine, religious aspects of wisdom have been mainly ignored by

psychologists. He further suggested that engaging religious concerns is a prerequisite for a serious treatment of wisdom.

In the psychological wisdom literature, a small number of theorists include spirituality in their wisdom conceptions. Kramer (1990) speaks of spiritual introspection, which she characterizes as “questioning the meaning of life” (p. 288), the nature of existence, and as the contemplation and resolution of existential dilemmas. Spiritual introspection also includes an acknowledgement of the validity of plurality of contexts for religious worship and beliefs for oneself and others; and meeting others with considerations of cultural, religious, and developmental differences when relating and advising. Her organismic and integrative model claims that no functions of wisdom are independent of the others, including spiritual development.

Jason et al. (2001) include spirituality as one of the five factors composing their wisdom conception, and spirituality is an empirically represented factor on their Foundational Value Scale (FVS), albeit with only two items. Spirituality, they write, “consists of living a spiritual life and having a fellowship or union with God” (Jason et al., 2001, p. 595). Ardel’s (2000a) model occasionally uses religious figures to illustrate that the search for wisdom-related knowledge is spiritual. Pascual-Leone (2000) employs Vedic teaching and transcendental meditation in his wisdom conception, positing that the development of post-formal thinking can lead to higher states of consciousness, including wisdom, spiritual enlightenment, and graceful life and aging. The notions of Achenbaum and Orwoll (1991), Helson and Srivastava (2002), Chandler and Holliday (1990), and Wink and Helson (1997) could also be added.

Arguably, spirituality and spiritual-like insight are difficult to conceptualize and operationalize (Wilber, 2006). Ken Wilber (2000), perhaps the most influential transpersonal

theorist of modern times (Rothberg & Kelley, 1998), points out at least four different meanings of the word spiritual that need to be considered. First, spiritual can be defined as the highest level of development in cognitive, interpersonal, transpersonal, and other domains. Second, spiritual can be defined as its own line of development (e.g., spiritual intelligence). Third, spiritual can be defined as a sense of religious or spiritual experience—like peak and meditative experiences. Finally, spiritual can be defined as an especially adopted attitude, including love and compassion, which seems to take the focus away from the self and thus may overlap with conceptions of transcendence (Levenson et al., 2001).

Given this multiplicity, the Foundational Value Scale (FVS) and the Spiritual Perspective Scale (SPS) will be used to assess the *importance* of spirituality, while the qualitative interviews will seek to gain insight into the spiritual lives and views of exemplars. It was hypothesized that exemplars average scores on the SPS would exceed normative mean scores by at least 10%. For a more in-depth discussion of spirituality, see Hodge (2001) and Wilber (2000, 2006).

### *Generativity*

In his critical review of wisdom literature, Trowbridge (2005) groups generativity with benevolence, empathy, and compassion, and posits all toward the common good. Based on Erik Erikson's (1957) theory of psychosocial development, generativity versus stagnation marks the seventh of eight stages, the stage typically associated with midlife. In this sense, generativity is a complex psychosocial construct that can be expressed through social demand, inner desires, conscious concerns, beliefs, commitments, behaviors, and the overall way in which an adult makes narrative sense of his or her life.

Lyster (1996) writes,

Generativity combines effective communication skills with a broad perspective on life enabling the wise person to draw from one's own growth experiences, including past

rewards and regrets, and to pass on a perspective on situations which might otherwise be lacking. (p. 25)

Concisely, generativity is defined as “passing on one’s knowledge to future generations” (Lyster, 1996, p. 25). It is also defined as an adult’s concern for, and commitment to, promoting the well-being of youth and future generations through involvement in parenting, teaching, mentoring, and other creative contributions that aim to leave a positive legacy of the self for the future (McAdams & Ed du St. Aubin, 1992).

For this exemplar study, it was hypothesized that wise persons would be “doing” something with wisdom, contributing in some way to the common good. This thought is resonant with Baltes’ statement that “for wisdom to be wise, it has to be used for a good goal, your own development or the welfare of others” (as cited by Kent, 1992, p. 15). Generativity was operationalized by the Loyola Generativity Scale which will be expanded on in Chapter 3. It was hypothesized that exemplars average scores on the LGS would exceed normative mean scores by at least 10%. Theory and research about generativity are described in detail by Dan McAdams and Ed de St. Aubin (1998).

### *Life Satisfaction*

According to Pavot and Diener (1993), life satisfaction “refers to a judgmental process, in which individuals assess the quality of their own lives on the basis of their own unique set of criteria” (p. 164). High life satisfaction is thought to be the degree to which when one’s perceived life circumstances resonate with a self-imposed set of standards. While the actual components of what affords a good life might overlap (e.g., health, successful relationships), individuals are likely to have unique component criteria, different assessment standards, and apply different weights in discernment. Thus, life satisfaction is a conscious cognitive judgment of one’s life in which the criteria for judgment are specific to the individual.

In the current study, it was hypothesized that exemplars average scores on the SWLS would exceed normative mean scores by at least 10%. The Satisfaction With Life Scale will be employed to operationalize and test this prediction. For a more in-depth discussion, theory and research about life satisfaction can be found at Andrews and Withey (1976), and Diener, Emmons, Larson, and Griffin (1985).

### *Humility*

More recently, social and personality psychologists have begun to examine humility as a form of personal strength or virtue (Exline et al., in press). According to Robins (1998), humility includes an appreciation that our perception of others, ourselves, events, and the world is subjective and tentative. Subjective means that others perceiving the same event can have very different interpretations of that event. Tentative suggests that each of us tends to change our own perspective of the same event over time. Wisdom Therapy's construct of Humility also includes an awe and respect for the grand scale of events of nature and the relativity of our human presence within it.

Emmons (1999) suggests that humility involves accuracy, self-acceptance, keeping one's talents and accomplishments in perspective, understanding one's imperfections, and freedom from both low self-esteem and arrogance. In her list of key features of humility, Tangney (2000, 2002) includes an accurate sense of one's abilities and achievements, the ability to acknowledge one's mistakes, gaps in knowledge, imperfections, and limitations (often with reference to a Higher Power), openness to new ideas, contradictory information, and advice, and an ability to keep one's abilities and accomplishments in perspective. According to Landrum (2002), humility involves a willingness to admit mistakes, seeking advice with an open-minded attitude, and having a desire to learn.

(Exline et al., in press) suggests that humility involves a non-defensive willingness to see the self accurately, including strengths and limitations. They have proposed that humility is likely to stem from a sense of security in which feelings of personal worth are based on stable, reliable sources (e.g., feeling unconditionally loved; belief in value of all life) rather than on transient, external sources such as achievement, appearance, or social approval (Crocker & Wolfe, 2001). Such a sense of security might stem from personal values, life experiences, or religious views.

Humility tends to arise in late lifespan development associated with wisdom (Robins, 1998). For a more in-depth discussion of humility see Exline and Geyer (2003), Exline et al. (in press), and Robins (1998).

#### *Ego Development.*

According to Loevinger (1998), ego development is conceptualized as a frame of reference that represents the fundamental structural unity of a personality. Ego is thought to be both a structure and processor. As a processor, ego filters and integrates intrapersonal and interpersonal information. Structurally, ego determines how information is seen, processed, and understood.

One of the most robust, and most well-known measures of adult development is the Washington University Sentence Completion Test (WUSCT). The WUSCT can successfully detect high levels of ego development (Cook-Greuter, 1999). The WUSCT is based on the hypothesis that the way people codify meaning through the symbolic medium of language, unconsciously reflects his or her self-concept, worldview, concept of other, and preoccupations (Miller & Cook-Greuter, 1994). The eight stages traditionally measured by the WUSCT are Impulsive, Self-Protective, Conformist, Self-Aware, Conscientious, Individualistic,



Autonomous, and Integrated. Loevinger (1976) posits that ego development is a master trait primary along the various developmental traits of moral development, worldview, and interpersonal skill.

In 1994, Cook-Greuter revised the scoring manual of the WUSCT to clarify advanced responses and added two stages, Construct-Aware and Unitive. Development was, thus, divided into four tiers: preconventional, conventional, postconventional, and transcendent.

Staudinger has emphasized the relevance of Loevinger's scale of ego development as highly relevant for wisdom (Mickler & Staudinger, 2008). It was hypothesized that exemplars' average score on the WUSCT would exceed the highest conventional stage of adult development.

*Inverse Qualities: State and Trait Anxiety, Perceived Stress, and Sub-Clinical Narcissism*

*State and trait anxiety.* State anxiety is defined as transitory physiological arousal and thoughts of impending doom, while trait anxiety is described as a reflection of frequent past experiences of state anxiety that increases an individual's sensitivity or proneness to experience future state anxiety (Spielberger, 1972). Trait anxiety is thus a stable disposition that is considered to be part of one's personality. Both state and trait anxiety will be operationalized by the State-Trait Anxiety Scale. For more on state and trait anxiety see Cattell and Scheier (1963).

*Perceived stress.* Perceived stress is defined as the degree to which situations in one's life are appraised as stressful, and will be operationalized by the Perceived Stress Scale (Cohen, Kamarck, & Mermelstein, 1983). For more in-depth research on perceived stress, see Cohen et al. (1983) and Treadgold (1999).

*Narcissism.* Narcissism is defined as "an important complex of personality traits and processes that involve a grandiose yet fragile sense of self and entitlement as well as a

preoccupation with success and demands for admiration” (Ames, Rose, & Anderson, 2006, p. 441). Narcissism will be operationalized by Narcissistic Personality Inventory-16. For more on narcissism, see Emmons (1984,1987), Morf and Rhodewalt (2001), and Raskin and Terry (1988).

It was hypothesized that exemplars’ average scores on the State Trait Anxiety Inventory (STAI), Perceived Stress Scale (PSS-10), and Narcissistic Personality Inventory (NPI-16) would fall below the mean normative scores of each measure by at least 10%.

### *Conclusion*

Personal wisdom-related components most relevant to the current research were reviewed to illuminate potential qualities in exemplars, with the caveat that each is arguably necessary, but not sufficient, in characterizing wisdom. Recall that openness was characterized as a commitment in ideas, values, and experiences, to: continuing development; sampling novelty; appreciation of multiple perspectives which may be controversial; and respect for individual differences and tolerance of others. Mindfulness was defined as knowing what is happening in the present moment while it is happening, paying attention on purpose and without judgment, and the process of cultivating insight (vipassana) which is “is the understanding of the true nature of things” (Thera, 1975, p. 4) as they are from moment to moment.

Spirituality was conceived as questioning the meaning of life, as the highest level of development across domains, as its own type of intelligence, as a variety of state experiences, and as an especially adopted attitude. Generativity was put forth as a way in which an adult makes narrative sense of his or her life; passing on knowledge to future generations; and an adult’s concern for, and commitment to, promoting the well-being of youth and future generations through involvement in parenting, teaching, mentoring, and other creative

contributions that aim to leave a positive legacy of the self for the future (McAdams & Ed du St. Aubin, 1992). Life satisfaction was defined as a conscious cognitive judgment of one's life in which the criteria for judgment are specific to the individual.

State anxiety was defined as transitory physiological arousal and thoughts of impending doom, while trait anxiety was described as a reflection of frequent past experiences of state anxiety that increases an individual's sensitivity or proneness to experience future state anxiety (Spielberger, 1972). Perceived stress was defined as the degree to which situations in one's life are appraised as stressful. Finally, narcissism was operationalized as grandiose yet fragile sense of self and entitlement as well as an important complex of personality traits and processes that involve a preoccupation with success and demands for admiration.

With regard to personal components characterizing wisdom, Achenbaum (2004) contends that we should "broaden our field of vision" (p. 303), given wisdom's value in human relations, and introduce new empirical measures to elicit hidden insights. Spirituality and mindfulness have yet to be assessed in the empirical study of wisdom, to this writer's knowledge, with the slight exception of Jason et al. (2001). Nor have the factors narcissism, anxiety, and stress.

Moreover, adopting the sentiments of Trowbridge (2005), "It is frustrating that none of the researchers who have investigated average people's conceptions of wisdom have compared them with the characteristics that philosophers have identified as comprising wisdom" (p. 257). In this sense, exemplars present the opportunity to both compare their personal qualities to existing personal conceptions of wisdom and seek deeper insights. As previous research has inquired (e.g., Staudinger et al., 1997), do personal wisdom components come together as a complex of qualities? None of the literature to date has utilized exemplars as their research sample, but rather relied on common persons' opinions.

*Empirical Studies of Wisdom Most Relevant to Exemplars*

Trowbridge (2005) identifies three existing empirical studies as the closest to the study of exemplars. They are Levitt (1999), Montgomery et al. (2002), and Baltes et al. (1995). This author has also included Gross (1995) and Lyster (1996). For a clear, concise, and comprehensive review of all published empirical wisdom studies between 1980 and 2005, see Trowbridge (2005). Also see Brugman (2006), Kramer (2000), Marchand (2003), Sternberg (1990), Sternberg and Jordan (2005).

*Levitt (1999)*

Levitt (1999) employed grounded theory in a study of 13 monastic Tibetan Buddhist students aged 22 to 40. Her purpose was to explore the cultural context of wisdom development and provide a non-Western understanding of wisdom. She utilized semi-structured interviews, with interpreters, categorized into five areas: facilitative conditions, definitions, teaching process, methods of developing wisdom, and personal experience. The average age of participants was 26 years old. The Tibetan Buddhist students had been practicing an average of 7 years and were selected based on their availability and English-speaking abilities.

Levitt (1999) found that wisdom is distinct from degree of intelligence, education, and religion, while being associated with self-knowledge, distinguishing good from evil, compassionate behavior toward others, altruism, personal characteristics like honesty and humility, and treating all creatures as equal. Similar to McKee and Barber (1999), wisdom was viewed as seeing beyond illusion and using this knowledge for the service of others. A strong desire to learn, compassion, ability to abide in uncertainty, and the exertion of effort were mentioned as antecedents to wisdom. All participants reported spiritual teachers and mentors as essential to wisdom's emergence, as well as meditation and dialectical debate.

Limitations included negotiating cultural and linguistic barriers in understanding the nuances of wisdom, participants reciting predominantly doctrinaire views of Buddhism as the central responses to her questions, and the absence of a rationale for her category selections. Besides cultural considerations, it was unclear why Levitt (1999) chose this particular monastery for her research on wisdom. This writer was also left wondering why the Lamas, or “highly advanced monks who had reached enlightenment” (Levitt, 1999, p. 94) were not the focus of her study instead of the students.

*Montgomery, Barber, and McKee (2002)*

Montgomery et al. (2002) utilized phenomenology to study 6 adults with “wisdom-facilitative” backgrounds in order to understand wisdom as it is experienced. The wisdom-facilitative criteria, derived from the research of Baltes and Staudinger (1993), included the domains of teaching, clinical psychology, and pastoral counseling. Researchers ultimately combined wisdom-facilitative backgrounds with age and experience to select participants.

Participants ranged in age from 60 to 88, 2 were female and 4 were male, and all were asked two interview questions: “Can you describe one or more times in your life in which you believe you were wise, or acted wisely?” and “Can you describe a wise person in your life?” (Montgomery et al., 2002, p. 141). The results indicated five essential elements to wisdom: guidance, experience, moral principles, time, and compassionate relationships. Guidance included components of mentoring and being mentored, and was used most frequently in coding. Time was conceptualized as “the landscape of wisdom” (2002, p. 150), although the capacity for reflection might have been a more accurate appraisal. Compassionate relationships were seen as supporting and reinforcing guidance. Researchers identified three areas they believed to fall

outside of empirical inquiry thus far: “the consummatory aspects of wisdom, its association with close relationships, and the willingness of wise persons to confront error” (p. 155).

Critically, the use of wisdom-facilitative backgrounds to study wisdom is a potentially rich design, although only a first step. There were no additional converging measures for assessing wisdom in participants. Instead of considering the current sample as wise, why not have asked them to identify wise people? This question will specifically inform the current exemplar study. Additional limitations included the small sample size, the absence of spirituality, and the need for further definition and clarification in the five elements. Moreover, Trowbridge (2005) writes, “I felt dissatisfied upon finishing Montgomery et al. (2002), wanting more and deeper analysis from the researchers . . . much of their brief report consists of unreflected-on excerpts from the participants” (p. 255).

#### *Gross (1995)*

Gross (1995) employed semi-structured interviews and collected life narratives of 7 Caucasian women aged 70 to 100. Participants were peer-nominated by another woman who considered them to be an exemplar of aging. The purpose was to gain an understanding of the lives of exemplary women from the vantage point of psychological and spiritual perspectives. Participants were asked questions about life meaning, current concerns, philosophy of life, spiritual perspectives, and advice for younger women.

Gross (1995) found two sets of themes, those elicited by the interview questions and those that emerged from the data as a whole. Social bonds (especially with friends), lifelong learning, processing feelings, clarifying and modifying values, learning and conveying knowledge, and an a-traditional, continually unfolding philosophical/spiritual view were predominant themes. Similar to Baltes and Staudinger’s (2000) lifespan contextualism and

management of uncertainty, the utilization and accessibility of inner resources for coping with changes and losses was associated with psychospiritual development.

Although Gross (1995) conceptualized the study findings as “wisdom” of the exemplary elders, what is meant by wisdom is confined to her subjective judgment. Defining, operationalizing, and reviewing conceptions of wisdom might have grounded and contextualized her assessment of what is wise. The same is true of “exemplar.” The exemplar selection process, while promising in its capacity as a peer-nominated system, offered no screening process for the selection of exemplars beyond writing a one- to two-page reflection, or stated why the nominators were particularly qualified to make this assessment. As the sole reviewer, her interpretations are the only perspective through which the data were filtered. By contrast, her lines of questioning are particularly relevant as areas of inquiry for exemplars of wisdom, as they might elicit the experience of wisdom both as lived and as something for reflective consideration.

*Baltes, Staudinger, Maercker, and Smith (1995)*

The primary goal of the Baltes et al. (1995) experimental study was to assess the potential for psychological bias in their wisdom paradigm by examining a sample of “real-life wisdom nominees” (p. 163). Accordingly, persons nominated as wise were compared to clinical psychologists and control groups.

Employing a nomination process facilitated by selected journalists, 21 of 156 public figures of distinction fulfilled the independent wisdom selection criteria, none of whom were psychologists (Baltes et al., 1995). The majority of wisdom nominees were older adults ( $M = 64$  years), although the range was relatively broad (41 to 79 years). Efforts were made to balance age, education, gender, and socioeconomic status between the wisdom and psychologist groups.

The control groups, both old (60 to 80 years) and young (25 to 35 years), were predicted to provide a high baseline for comparison. They were selected with respect to social status, education, and work outside the field of professional human service.

Each of the four groups' participants responded to two wisdom-related tasks, a life-planning problem and an existential-life problem involving the potential suicide of a friend (Baltes et al., 1995). Data were collected via think-aloud methodology and was assessed on five scales by a panel of 13 interdisciplinary raters. Rates considered content, uninterrupted thinking aloud, and total number of words.

Baltes et al. (1995) found no negative age differences in wisdom-related performance up to age 80, supporting findings of earlier research (Smith & Baltes, 1990; Smith, Staudinger, & Baltes, 1994; Staudinger et al., 1998; Staudinger et al., 1992). Older clinical psychologists and wisdom nominees significantly outperformed young- and old-comparison groups on both tasks. Clinical psychologists outperformed control groups, supporting the wisdom enhancement effect of a profession oriented toward matters of the human condition found in previous studies (Smith et al., 1994; Staudinger et al., 1992). Notably, wisdom nominees did not perform better than clinical psychologists, although the combined group comprised a larger share of the top 20% of wisdom-related performance than did the control group. Wisdom nominees, however, evidenced the highest level of performance on what researchers considered the core measure of wisdom in this study, existential life management and value relativism.

Baltes et al. (1995) concluded that their wisdom conception is not one that would result in the poor performance of non-psychologists. They further claimed these findings support that their model is not one of specific professional expertise, but rather a fertile paradigm for the continuing elucidation of wisdom.



Critically, why journalists were particularly qualified to select wisdom nominees was not explained. The study was culturally myopic, wisdom-related tasks lacked multiple mediums for reflection and response (e.g., talking with others, writing), and wisdom-related performance might have differed if the wisdom-related task was applied contextually and experientially versus theoretically. Moreover, a personally relevant, wisdom-related task might have allowed the emergence of genuine emotion and life experience, potentially helping to mediate the cognitive- and intellectually-based exercise. Interestingly, the wise barely scored at an average level, with a high of 54% of the total possible points, replicated in the Lyster study (1996). Finally, in a research project considered closest to the study of exemplars (Trowbridge, 2005), “real-life wisdom nominees” (Baltes et al., 1995, p. 163) were not asked any direct questions about their perspectives or experiences as wise persons.

*Lyster (1996)*

The Lyster (1996) study is closest to the present investigation of exemplars. The purpose was to “contribute to the development of the wisdom construct in psychology by relating wisdom to standard measures of functioning” (p. 6). Lyster utilized mixed qualitative and quantitative methods to measure the five criteria of the Berlin wisdom paradigm (plus affect-cognition integration and generativity) in 78 “wise” nominees, 78 nominators, and 22 self-referred wise people.

Statistical analyses revealed that people with higher wisdom scores tended to have higher emotional complexity, be better educated, were more dialectical and less absolute in terms of their paradigm beliefs, coped with sadness with more reflection and less avoidance, tended to be more open and intelligent, were less dissatisfied with their lives (than participants with lower wisdom scores), and endorsed fewer internal control beliefs. No gender differences were found

in wisdom scores when controlling for education and participants who were referred by their peers scored higher than either group. No relationship was found between wisdom and age, while openness to experience was the strongest predictor of wisdom.

Like other Berlin Group findings, and relevant to the current study, wise nominees were disproportionately represented in human-service professions, particularly the advising professions of ministry, mental health, and education. Human-service professions may facilitate both the world knowledge as well as the empathy and compassion components of wisdom. The inverse causality may also be true, insofar as those who have more of both may, perhaps, self-select to enter the service professions. A positive feedback loop likely exists between the two (Robins, 1998). Additionally, in a qualitative analysis of the responses given by the 10 highest wisdom scorers, Lyster (1996) found that they considered wisdom to be characterized by good listening skills, tact, silent power, and an ability to preserve the relationship. Rather than proffer advice, they preferred the role of responsive listener.

Lyster (1996) is to be commended for an ambitious empirical investigation parallel in breadth and depth only to the Berlin Wisdom Group. Her integrative quantitative-qualitative approach was geared to measure wisdom through a consideration of the whole person, making the wisdom tasks personal.

Critically, the wise nominees—not unlike the Berlin studies—did not achieve scores remotely close to the wisdom ideal. Kramer (2003) notes that “a great deal of potential wisdom went untapped” (p. 137) as wisdom nominees’ highest scores were only 51% (32 out of 63) of the total wisdom score. Wisdom nominees were peer-referred and no rationale was offered as to why the nominators were particularly qualified to nominate wise people. Rather, the majority of nominators were gathered by a researcher ad in a local newspaper and were predominantly

English-speaking, Caucasian, middle class, male, over 60, and Canadian. Because the specific intent of the study was to examine wisdom as it manifested in older people, the sample was restricted in age range. Lyster (1996) used structured interviews with strict adherence to the standard formatting leaving much unsaid. Finally, like most other empirical studies of wisdom, spirituality was not operationalized or assessed.

### *Conclusion*

Empirical studies most relevant to the study of exemplars were put forth and reviewed as a context for the current research. Notably, there were few, none of which included exemplars. While helpful in guiding an approach to the selection process of wise persons, the reviewed methodologies lacked rigor and were, to an extent, arbitrary in their selection of participants. For the current study, integrating a variety of these selection procedures is hypothesized to be more promising than previous studies, and provides a platform for exemplars to explore and articulate their own experiences and perspectives.

### *Chapter Review*

The literature review of wisdom focused on contemporary psychological and empirical conceptions of wisdom and its relevance to exemplars lives, opinions of wisdom, and wisdom-related characteristics/qualities. Presented in five parts, it began with a commentary on researcher qualifications, organizational rationale, and identified areas not covered in this review. Psychological and philosophical definitions of wisdom were reviewed next, and theoretical and psychological models were then presented and critically assessed. Personal wisdom-related components and their potential inverse preceded the presentation and evaluation of empirical studies most relevant to the study of exemplars. The final section will summarize findings from the previous five and the relevance of the current study will be revisited.

*Summary and Exemplar Relevance Revisited*

Exemplars like Socrates, Confucius, Buddha, and Aristotle pioneered explorations into wisdom's nature, relevance, and relationship to the common good. Wisdom's association with philosophy and the advent of behaviorism kept it from the realm of psychological inquiry until roughly 30 years ago. Researchers like Ardelt (1997), Baltes (1990), Clayton and Birren (1980), and Sternberg (1986) ushered in the modern era, introducing wisdom to the realm of psychological discourse. Since 1980, over 100 empirical studies have been undertaken, none of which have included exemplars with the qualitative exception of Ahmadi (1998, 2000) and Thomas (1991).

Recent philosophers and psychologists have spent decades trying to define the essence of wisdom, with the Arête Initiative providing a contemporary backdrop for this inquiry. Agreement seems to converge around wisdom being characterized as elusive, multidimensional, integrative, and oriented toward what is good, both individually and collectively. Prevailing psychological and theoretical models have enhanced wisdom conceptions through empirical measurement, the solicitation of implicit opinions, cross-cultural aggregations, developmental paradigms, and personality correlates. Personal components such as openness, insight, generativity, and spirituality have been related to wisdom, and exemplars offer the opportunity to explore and compare these associations. Mindfulness, spirituality, and humility offer particularly new investigations into the psychological study of wisdom, while anxiety, stress, and narcissism would seem to relate inversely.

Modern empirical research most relevant to exemplars demonstrates rudimentary efforts to seek out the wise through a variety of methodologies and inquiries. On the whole, a large proportion of empirical studies have focused on randomly chosen people's conceptions, and no

studies carried out thus far have included exemplars. Paraphrasing Orwell and Perlmutter (1990), learning from wise people necessitates that we actually converse with them. Furthermore, studying and conversing with those who are purportedly wise is thought to contribute an increasingly material wisdom perspective to a theoretically based discipline.

More globally, researchers (e.g., Sternberg, 2004) contend that the word wisdom “exists as an eternal witness of the hope that humans can make thoughtful, caring, and intelligent choices for the well-being of all whom they affect” (Trowbridge, 2005, p. 50). As some (Ardelt, 2000a; Orwell & Perlmutter, 1990) claim that exemplars embody wisdom itself, it seems relevant to learn about their lives, garner their perspectives and reflections, and assess their characteristics.

Scholarly research into wisdom has yet to explore and assess exemplars, and they, and their perspectives, remain urgently needed. Trowbridge (2005) reflects, “The particular value of studying exemplars carefully is that they can show us the way to wisdom” (p. 248). While it seems more likely that multiple pathways exist toward wisdom’s realization, the lives and opinions of exemplars are promising for the future of this inquiry, and potentially the world itself. Sternberg (2004) writes, “In a world torn with strife and warfare, wisdom may be the only hope out of the bloodshed” (p. 286).

### Chapter 3: Methods

It is from the perspective of the whole person that we believe wisdom should be studied.  
(Orwoll & Perlmutter, 1990, p. 165)

As stated in previous chapters, researchers (e.g., Maslow, 1971; Orwoll & Perlmutter, 1990; Trowbridge 2005) have expressed the view that we have to study wise people themselves if we want to understand their lives, opinions, and wisdom-related characteristics.

The following chapter is intended to elucidate and operationalize this investigation, and will be presented in six sections. It begins with an overview of the study design, rationale, and methods, followed by a description of the characteristics of co-participants most suitable. Procedures, including timeline and data collection, are presented next; and assessment methods and instruments are then reviewed. Finally, planned data treatment and analysis precedes a discussion of study limitations and delimitations.

#### *General Design Overview and Rationale*

##### *Overview*

Inspired by the suggestions of wisdom's psychological and empirical predecessors, contemporary scholars have given some guidance for carrying out a study of this type, calling it the exemplar and personological approach (Orwoll & Perlmutter, 1990; Trowbridge, 2005). The exemplar approach makes use of qualified nominators to identify persons who exemplify wisdom, and once selected, the personological approach recommends a collection of integrative data, including interviews, assessments, and surveys. While "validation support for peer nominations is still sparse in the study of wisdom" (Orwoll & Perlmutter, 1990, p. 167), precedence for this research strategy can be found in studies of persons with exceptional adjustment, ego development, and intelligence.

### *Rationale*

This combined methodology is particularly well suited for the current research when viewed from both theoretical and practical perspectives. First, this protocol provides a means of focusing explicit attention on people who are clustered at the upper end of the proposed wisdom continuum (Orwoll & Perlmutter, 1990). Second, it is based on the premise that wisdom can be better understood by the intensive study of those considered to be wise (Orwoll & Perlmutter, 1990). Finally, it contends that exceptionally wise people should provide insight into wisdom's nature, including the potential interrelationships among various correlates of wisdom; development, including events and life course processes contributing to wisdom; and consequences, including what it means to live a wise and meaningful life.

### *Employing Mixed Methods*

Fittingly, to best fulfill the primary areas of investigation and actualize the methodologies set forth, the researcher instituted an integrative research design using both qualitative and quantitative approaches. Such interplay between qualitative and quantitative approaches was intended to “expand the present study’s limits allowing the documentation of the elusive and subjective nature of the construct of wisdom and relating them to objectively assessed dimensions of wise people” (Lyster, 1996, p. 26).

*Qualitative.* The qualitative methods of semi-structured interviews and thematic analysis provided explorations into co-participants’ lives, opinions, and wisdom-related qualities and characteristics. This course of investigation permitted the researcher to potentially uncover otherwise inaccessible information by following up with emerging areas of interest with the interviewee (Braud & Anderson, 1998). Content analysis also allowed for the discovery of

various layers of meaning through systematic identification (Braud & Anderson, 1998, p. 278) of both predetermined content areas and emergent themes.

*Quantitative.* Quantitative measures and questionnaires, including the Self-Assessed Wisdom Scale (SAWS), Perceived Stress Scale (PSS), Spiritual Perspective Scale (SPS), Loyola Generativity Scale (LGS), Satisfaction With Life Scale (SWLS), State-Trait Anxiety Inventory (STAI), Mindful Attention Awareness Scale (MAAS), Narcissistic Personality Inventory (NPI-16), Foundational Value Scale (FVS), Big Five Inventory (BFI), Washington University Sentence Completion Test (WUSCT), and Humility Inventory (HI) provided performance-based and empirical data about dimensions of wise persons. Converging information was then drawn on to assess the nomination validity of co-participants considered exemplars of wisdom, elucidate the nature of their wisdom, provide an empirical means to compare exemplars to the norm, and provide for an assessment of specific inter-correlations.

It was hypothesized that exemplars' average score on the Self-Assessed Wisdom Scale would exceed the *cutoff score* (of 201.6) considered to be wise. Second, it was hypothesized that exemplars' average scores on the Loyola Generativity Scale (LGS), Mindful Attention Awareness Scale (MAAS), Satisfaction With Life Scale (SWLS), Big Five Inventory (BFI) Openness to Experience, and Spiritual Perspective Scale (SPS) would exceed the normative mean scores for each measure by at least 10%. Third, it was hypothesized that exemplars' average scores on the State Trait Anxiety Inventory (STAI), Perceived Stress Scale (PSS-10), and Narcissistic Personality Inventory (NPI-16) would fall below the mean normative scores of each measure by at least 10%. Fourth, it was hypothesized that exemplars' average score on the WUSCT would exceed the highest *conventional stage* (of 4.0) of adult development, the Achiever. Fifth, it was hypothesized that there would be statistically significant ( $p = .05$ ) positive correlations between the Self-Assessed Wisdom Scale (SAWS) and: BFI Openness to



Experience, Spiritual Perspective Scale (SPS), Mindful Attention Awareness Scale (MAAS), and Loyola Generativity Scale (LGS).

All hypotheses will be listed at the beginning of Chapter 4. Limitations of this methodology are explored later in the chapter.

### *Co-Participants*

This research design utilized two groups of co-participants most suited for its purposes: exemplar nominators and exemplars of wisdom.

#### *Exemplar Nominators*

To address validity in the selection of exemplars, Orwoll and Perlmutter (1990) wrote, “Confidence in the nomination procedure can be enhanced with multiple nominators and particularly qualified nominators” (p. 167). While they provide no specific parameters regarding a nominator sample size, 15 were utilized within the current study. Moreover, these nominators fulfilled the particularly qualified exemplar proviso by being prescreened for the wisdom-facilitative criteria of the world’s leading empirical researchers of wisdom, the Max Planck Institute (Ardelt, 2004a; Sternberg, 1998).

The wisdom-facilitative criterion emerged from Baltes and Staudinger’s 1993 study and consists of a “background of and/or professional activity in areas we consider facilitative of the accumulation of wisdom-related knowledge” (p. 77). These areas include teaching, pastoral/ministerial counseling, and clinical psychology/counseling. Modern empirical research adds credence to both these findings and the current design rationale, as Staudinger et al. (1998) found that the greatest predictive factor for wisdom is profession, particularly within fields oriented toward the human condition. Additionally, in the Lyster (1996) study, wise nominees were disproportionately represented in human-service professions, particularly the advising

professions of ministry, mental health, and education. Helson and Srivastava (2002) also found that a career in spiritual activity “added significantly to the prediction of wisdom” (p. 39).

Moreover, exemplar nominators were sought that have not just one but a convergence of these *wisdom-facilitative* experiences over the longest period of time (Montgomery et al., 2002). Baltes and Staudinger (1993) call this approach “age by experience” (p. 77), and theoretically, the current nominators, having had greater exposure to *wisdom-facilitative* experiences over time than the average person, were predicted to be more capable of articulating the nature of their wisdom and identifying it in others (Trowbridge, 2005).

As an important caveat, minimal risks were predicted for nominators who partook in the study, as they were reflecting on wisdom and wise persons, and they were free to withdraw their participation, without penalty or prejudice, at any time. Benefits included sharing their notions of wisdom, potentially connecting with the nominated exemplars, and furthering the psychological study of wisdom.

### *Exemplars of Wisdom*

Wisdom exemplars consisted of 20 co-participants identified by the nominators and willing to take part in the study. The investigator preferred no parameters for age, education level, gender, sex, religious orientation, marital/domestic partner status, socioeconomic status, or ethnicity. However, it was the inclination of this researcher to conduct as many interviews as possible in person. Therefore, many participants resided in the San Francisco Bay Area and the researcher traveled when necessary and possible.

Benefits of exemplar participation included recognition of a life wisely lived and the generative potential to impart previously undocumented wisdom toward the psychological study of exemplars. Potential risks to the interviewed exemplars included any distress that might arise

from the sharing of personal content and personal reflections. Exemplars were free to decline answering any of the interview questions at any time, and they were also free, without explanation or justification, to withdraw at any point during the research process. Three San Francisco Bay Area psychologists were available as resources to those experiencing any distress or communicating the need for follow-up support. Many exemplars reported having an enjoyable time.

### *Procedures*

#### *Exemplar Nominators*

*Recruitment.* Nominators were recruited through professional organizations related to the previously reviewed wisdom-facilitative domains, including, but not limited to, the American Association of Pastoral Counselors (AAPC), American Psychological Association (APA), California Psychological Association (CPA), and Spiritual Directors International (SDI). Web sites of integrative San Francisco Bay Area graduate schools such as the Institute of Transpersonal Psychology (ITP), California Institute of Integral Studies (CIIS), John F. Kennedy University (JFK), and Berkeley Theological Union (BTU) were searched for potential candidates. Legal and accessible online membership profiles were reviewed.

Additionally, exemplar nominators were recruited by word of mouth. For example, “Do you know of anyone who is a spiritual/pastoral/ministerial counselor, teacher, and clinical psychologist/counselor?” Potential nominators were then contacted through e-mail to invite their participation. See Appendix G and Appendix I for more information.

*Protocol.* Following a brief explanation and overview of the study, and if they were still interested, nominators were asked to complete an enclosed consent form (Appendix A) and e-mail, fax, or mail it back to the researcher. An electronic signature option was offered to

participants wherein they could type their name directly on the consent form. This choice was being extended to both simplify and expedite the process for researcher and participants.

Importantly, the participants were instructed to, in the subject line of the return e-mail, make the explicit statement of their name, that they were giving informed consent, and included a simple name for the research project. For example, “F. Brown gives informed consent to wisdom study.”

Nominators were also asked to identify between two and five exemplars of wisdom that they knew personally, identify the two wisest exemplars, and e-mail their selections to the researcher. If nominators believe themselves to be one of the two wisest exemplars, they were asked to include themselves. Contact information (e.g., e-mail, phone number) was requested for the top two exemplars. The researcher then securely recorded the names and contact information of the top two exemplars and established a reasonable timeline for the completion of the remaining portions. Nominators were then sent an e-mail (Appendix H) with an assigned participant number (e.g., Nominator 1) and pseudonym (e.g., Exemplar N1) for their exemplars to protect the confidentiality of all involved by separating consent-form data, nominator data, and online data (R. Rominger, personal communication, May 4, 2008). Nominators were invited to securely log-on (Appendix E) and fill out a demographic questionnaire (see Appendix F), a measure of wisdom characteristics (FVS) that seems to reflect the exemplars qualities, write a one-page description of why he or she is an exemplar of wisdom, and answer an additional question regarding the context and length of time in relationship with the exemplar. Upon completion, the researcher emailed the Nominators a short note of appreciation for their participation in the study (Appendix I).

### *Exemplars of Wisdom*

Exemplars received an e-mail or telephone call from the researcher inviting them to the study and informing them of the process to come (Appendix J). Co-participants were specifically informed that they had been nominated as exemplars of wisdom by persons that knew them. If interested, they were asked to return the enclosed consent form (Appendix B) via e-mail, fax, or mail. The aforementioned electronic signature process was also offered to exemplar participants wherein they could type their name directly on the consent form. Exemplars then received an e-mail with a confidential participant number and instructions about how to access the secure online assessments (Appendix K). This step was again employed to protect the confidentiality of all involved by separating consent-form data from online data. Measures were organized and balanced online with instructions on how to complete them but no measure names or descriptions were present to avoid biasing exemplars toward wanting to appear a certain way.

### *Concluding Procedures*

Once selected, all exemplars and control group co-participants were then reminded to fill out all of the online quantitative measures within 2 weeks. Upon completion of the measures and consent forms, the researcher scanned them for completeness and, if any items were incomplete, participants were then contacted about the missing data by e-mail or phone calls.

All co-participants from the exemplar group were invited to participate in semi-structured interviews (Appendix C, Appendix L, Appendix N). The interview was scheduled for 60 to 90 minutes at a location and time convenient for the participants and the researcher. A default location was the researcher's professional office in Palo Alto, California. Interviews were digitally recorded by two sources to ensure quality and reliability; stripped of identifying material and professionally transcribed (Appendix D). The most clear and understandable

recording was used and the remaining recording was destroyed to protect participant confidentiality. Interview content was then analyzed using MAXQDA (Verbi Software, 2007). Exemplars were sent a note of appreciation for their time and participation by the researcher (Appendix M).

### *Assessment Methods*

#### *Quantitative*

The quantitative instruments utilized were the Self-Assessed Wisdom Scale (SAWS), Perceived Stress Scale (PSS), State-Trait Anxiety Inventory (STAI), Satisfaction With Life Scale (SWLS), Spiritual Perspective Scale (SPS), Loyola Generativity Scale (LGS), Mindful Awareness Attention Scale (MAAS), Narcissistic Personality Inventory-16 (NPI-16), Big Five Inventory (BFI), Washington University Sentence Completion Test (WUSCT), Humility Scale (HI), Foundational Value Scale (FVS), and a demographic questionnaire. All exemplar participants completed all the measures included in this section, and the researcher expected all of these assessments to take approximately 75 to 90 minutes.

The weakness of the quantitative component of this approach is the assumption that wisdom, as a construct, can even be operationalized and measured. It was probably more likely that we were searching along the methodologically well-lit path of wisdom (Robins, 1998). Accordingly, particularly the wisdom and spirituality measures are rudimentary at best and may provide little to no psychometric or converging validity regarding wisdom.

As previously mentioned, a wisdom conception was needed that is measureable and amenable to statistical analysis. In 2003, Webster proposed the Self-Assessed Wisdom Scale (SAWS), which seems to be the best match for this study. In comparison, Monika Ardel's (2000a) Three-Dimensional Wisdom Scale (3D-WS) was developed for older populations, the

Practical Wisdom Scale (PWS) is too large and simplistic, and the Berlin Group and Sternberg wisdom measures are too expensive and labor intensive.

### *Qualitative*

The qualitative method employed was the in-depth semi-structured interviews. Twenty semi-structured interviews were conducted with the exemplar group. Consistent with the present study, questions were chosen that explored the lives, opinions of wisdom, and wisdom-related characteristics of co-participants. Questions were generally intended to be open-ended, allowing the co-participants to respond widely. The interview structure provided for the researcher to first, inquire first about co-participant lives; second, explore their wisdom-related characteristics, and finally, elicit their opinions of wisdom. The rationale for interviewing in this order was to avoid biasing co-participants by leading with explicit references to wisdom.

Sample interview questions included: What is your life like? How did you come to be the way you are? What are you doing for the common good? What are your values? What are your decision-making strategies? What are your spiritual perspectives? What concerns do you have, if any? How do you define wisdom? Can wisdom be learned? What personal and general components or conditions might facilitate its emergence and make it more accessible? Who do you consider to be wise? Interviews were explored and analyzed using thematic analysis. More is said about this later in the chapter. See Appendix N for more information.

### *Instruments*

#### *Self-Assessed Wisdom Scale (SAWS)*

In order to assess the construct of wisdom, the Self-Assessed Wisdom Scale (SWAS) was used. The SAWS is a 40-item 6-point Likert scale questionnaire asking participants to indicate their level of agreement (from 1 = *strongly disagree* to 6 = *strongly agree*). It was developed to

measure “dimensions of wise persons themselves” (Webster, 2003, p. 14), and is based on a multidimensional model of wisdom derived through a “review of the literature” (p. 14). The SAWS models wisdom as the cohesion of five independent, yet conceptually overlapping dimensions of personal experience. These previously mentioned five factors are hypothesized to be “relatively characteristic of a prototypically wise individual” (2003, p. 16) and included: Experience, Emotional Regulation, Reminiscence and Reflectiveness, Openness, and Humor.

Scoring consists of tallying the five components together, as each is considered necessary but not sufficient for the emergence of wisdom (Webster, 2003). Although the SAWS has few studies for comparison in norms or standardization, a score considered to be wise on the 30-item version (Webster, 2003) was set at 152 out of 180 (84.4%). Thirty-nine men and 46 women, with an average age 52.54 years ( $SD = 9.67$ ), participated in the norming study. Participants were mostly Caucasian (65%) and the average education level was 14.32 years ( $SD = 3.44$ ).

In order to achieve a wise score of 84.4% on the 40-item version employed by the researcher, exemplars needed to achieve total a score of 201.6. It was predicted that exemplars’ average score on the Self-Assessed Wisdom Scale would exceed the cutoff score considered to be wise, which is 201.6.

The average total scale reliability rating over three studies was adequate, at .825 (Webster, 2003). The SAWS was found to have a nonsignificant total scale score correlation with both age ( $r = .117$ ) and education level ( $r = .051$ ), whereas generativity and ego integrity were positively correlated ( $r = .303, p < .01$ ). Empirical wisdom research experts Staudinger et al. (2005) wrote: “The convergent validity data indicate that the SAWS scale seems to measure something like personal wisdom” (p. 212). The SAWS was amended in 2007, adding 10 more questions.



For the current research, this scale was of particular relevance, as Webster (2003) noted in his discussion of future steps to be taken with the SAWS: “The SAWS can be given to wise ‘nominees’ to determine whether they score higher than either normal controls or nominees from a different category more or less related to wisdom” (p. 21). Trowbridge (2005) also suggested using it to learn more about the quality of the wisdom in people who score highly.

#### *Foundational Value Scale (FVS)*

For the purpose of supplying nominators with indices to rate exemplar characteristics, the Foundational Value Scale (FVS) was employed (Orwoll & Perlmutter, 1990). The FVS was developed by Jason et al. (2001) to measure the construct and dimensions of wisdom. It was conceived by having participants identify a person they knew or knew of, whom they considered wise, and list that person’s qualities which (they felt) made him or her wise. It is composed of 23 items and employs a 5-point Likert-type scale with the following descriptors: 5 = *definitely*, 3 = *maybe*, 1 = *not at all*. The FVS is used primarily for identifying items that “best describes a person who has wisdom” (2000, p. 596).

The FVS has been normed on 43 adults with graduate degrees and 242 undergraduate students. The FVS had adequate internal and test-retest reliabilities. Internal reliability for the FVS components ranged from .62 to .78 with the total factor score at .86. Test-retest reliabilities ranged from .51 to .68, and had a total factor score of .62. Factor analysis posited five general components of wisdom: harmony (e.g., sees meaning and purpose in life, openness, good judgment), warmth (e.g., humor, being in the present, kindness), intelligence (e.g., genius, problem-solving ability, intelligence), connecting to nature (e.g., reverence for nature, childlike wonder and awe), and spirituality (e.g., living a spiritual life, feels love, fellowship, or union with God) (Jason et al. 2001).

The Foundational Value Scale (FVS) was useful in illuminating and comparing characteristics of wise persons, adding validity and explanation to the exemplar selections, and exploring potentially overlapping components of wisdom.

*Perceived Stress Scale (PSS-10)*

To assess perceived stress, the Perceived Stress Scale (PSS-10) was employed. The PSS-10 was created by Cohen et al. (1983) to assess the degree to which respondents found their lives to be “unpredictable, uncontrollable, and overloading” (p. 387). It is one of the few instruments that seeks to measure both the degree to which life events are perceived as stressful as well measure stress as a result of recent daily experiences (Treadgold, 1999). The overall PSS-10 score ranges from 0 (*low degree of perceived stress*) to 40 (*high degree of perceived stress*), and is rated on a 10 question 5-point Likert-scale format. Optional responses on each question range from 0 (*never*) to 4 (*very often*).

The PSS-10 was a brief measure chosen by the researcher to ease participant time burden without compromising adequate validity and reliability. The scale has demonstrated strong internal validity at .85 and adequate internal reliability of .85 at 2 weeks and .55 at 6 weeks (Treadgold, 1999). It was designed for use in community samples with at least a junior high school education (Cohen et al., 1983). The PSS-10 was correlated to the number of life events considered upsetting or bothersome, reported stress in an average week, and the amount of stress currently experienced as compared to a year ago (Cohen & Williamson, 1988). It has been used in many published studies (e.g., Cohen & Williamson, 1988; Groer, Carr, & Younger, 1993; Martin, Kazarian, & Breiter, 1995).

Psychological stress was assessed in a national survey in 2009 (Cohen & Janicki, 2010). Two thousand adults, with a mean age of 44.6 ( $SD = 15.5$ ), participated. The sample was

balanced to be representative of the general population based upon region, sex, age, and household income data from the 2000 U.S. Census. It was predicted that exemplars' average scores on the PSS-10 would fall below the mean normative PSS-10 score of ( $M = 15.83$ ,  $SD = 7.5$ ) by at least 10%.

### *Spiritual Perspective Scale (SPS)*

To measure the saliency and importance of spiritual views, the Spiritual Perspectives Scale (SPS) was used. The 10-item Spiritual Perspectives Scale (SPS), developed by Reed (1986), is based on a conceptualization of spirituality particularly relevant in later developmental phases of life and specifically measures participants' perceptions of the extent to which they hold certain spiritual views.

The goal of the SPS was to develop an instrument that was straightforward and easy to administer in a variety of settings, yet meaningful to adults. Participants respond to spirituality as defined broadly, although this does not necessarily exclude expressions of spirituality relevant for the participant that might be organized. One example is "My spirituality is especially important to me because it answers many questions about the meaning of life" (Reed, 1986, p. 2). Responses to each item are selected using a 6-point Likert-type scale that is anchored with descriptive words, including "*strongly agree to strongly disagree*" and "*not at all to about once a day.*" The SPS is scored by calculating the mean across all items for a total score of 1.0 to 6.0.

Psychometric properties of the SPS are reportedly very good (Reed, 1986). Initially, the SPS was tested on 400 adults of all ages, including healthy, hospitalized, and seriously ill groups. The healthy group was comprised of 45 men and 55 women, average age 60.54 ( $SD = 10.85$ ). Eighty-one percent were Caucasian, and 60% were retired. The mean score on the SPS for the healthy group was 4.16 ( $SD = 1.36$ ).

Reliability is rated consistently above .90, as estimated by Cronbach's alpha, with little redundancy among items. Average inter-item correlations average between .54 to .60 across adult groups, and all item scale correlations are above .60. Reed (1986, 1991) has found that women and lower socioeconomic groups tend to score higher, and participants who have a religious background tend to score higher than those participants without a religious background.

A potential limitation concerned the descriptive anchors. What if a participant does something more than once a day, or finds that a question is not applicable? To account for this, additional anchors "More than once a day" and "Not applicable" were added. The scale was thus adjusted to calculate the mean of all items on a 7-point basis. It was predicted that exemplars' average score on the Spiritual Perspective Scale would exceed the normative mean SPS score of 4.16 ( $SD = 1.36$ ) by at least 10%. It was also predicted that the SPS would be positively and significantly correlated with the SAWS.

#### *Satisfaction With Life Scale (SWLS)*

In order to assess life satisfaction as a whole, the Satisfaction with Life Scale (SWLS) was employed. The SWLS was created by Diener, Emmons, Larson, and Griffin (1985), and consists of five questions on a 7-point Likert scale with items ranging from *strongly agree* to *strongly disagree* to assess subjective experience of quality of life. One example is "If I could live my life over, I would change almost nothing." The scale takes approximately 1 minute to complete and is extremely brief.

The SWLS has been shown to hold both high validity and reliability. Pavot and Diener (1993), in reviewing much of the research, found that after 1 month, test-retest reliability was .84, while Diener et al. (1985) found it to be .82 after 2 months. Internal consistency reliability coefficients of the SWLS range from .79 to .89 (Pavot & Diener, 1993).

It was predicted that exemplars' average score on the Satisfaction with Life Scale (SWLS) would exceed an American adult ( $N = 255$ ) normative mean SWLS score of 24.2 ( $SD = 6.9$ ) by at least 10%.

#### *State-Trait Anxiety Inventory (STAI)*

In order to measure state and trait anxiety, the State-Trait Anxiety Inventory was utilized. Considered the most extensively employed anxiety assessment in the world, the adult State-Trait Anxiety Inventory (STAI) was first published by Spielberger, Gorsuch, and Lushene in 1970 as an anxiety self-report measure (Schwarzer, 1997). Commonly, it is used with military personnel, college students, working adults, and high school students. It has been standardized and validated on over 600 neuropsychiatric and medical surgical patients, 200 prison inmates, and 6,000 high school and college students (Spielberger, Gorsuch, Lushene, Vagg, & Jacobs, 1983).

The STAI is a 40-question assessment measuring anxiety in individuals as a trait (T) and as a state (S). Participants respond to 20 statements about how they feel right now (State) and 20 statements about how they generally feel (Trait). Example stems include "I am presently worrying over possible misfortunes" (State) and "I worry too much over something that doesn't really matter." Trait Anxiety (T) refers to relatively stable individual differences in anxiety proneness as a personality trait (Spielberger et al., 1983). Trait anxiety is also characterized as the differences in danger-assessment perception in stressful situations, and the potential anxious energy that a person has stored up and can react with. Conversely, State Anxiety (S) connotes emotional states of discomfort, typified by tension, worry, apprehension, and autonomic nervous system physical arousal. People with high T-Anxiety tend to react with higher levels of S-Anxiety in situations where relationships are involved or inadequate, self-esteem is challenged, or failure is experienced. Implied is that high T-Anxiety people may have a fairly rigid

internalized self-concept as compared to someone whose self-concept is supple/fluid enough to accommodate being inadequate, failing, or looking bad (Butlein, 2005).

The Trait Anxiety median coefficient is .90, and the State Anxiety scale has a median coefficient of .93 (Spielberger et al., 1983). College student test-retest correlations for S-Anxiety have a median score of .33, but that is expected since the particular amounts of anxiety at the time of testing are being measured and will likely differ in the future. Test-retest correlations for college students were .765. Concurrent reliability to other trait measures is strong as well, including the Taylor Manifest Anxiety Scale (Taylor, 1953), IPAT Anxiety Scale (Cattell & Scheier, 1963). T and S Anxiety have also been positively correlated with medical symptoms, aggression and impulsivity, and hostility (Spielberger et al., 1983).

It was predicted that exemplars' average scores on the State Trait Anxiety Inventory (STAI) would be lower than the normative mean STAI scores of State Anxiety ( $M = 33.6$ ,  $SD = 9.5$ ), and Trait Anxiety ( $M = 32.82$ ,  $SD = 8.32$ ), by at least 10%. The STAI was normed on 764 working adults ages 50 to 69 (Speilberger et al., 1983).

#### *Loyola Generativity Scale (LGS)*

In order to assess generativity, the Loyola Generativity Scale (LGS) was employed. The LGS is a 20-item self-report scale that uses a 4-point Likert scale to gauge an individual's concern with the goal of providing for the next generation (McAdams & de St. Aubin, 1992). Developed by McAdams and de St. Aubin (1992). The LGS is the most popular current test for generativity and assesses the extent to which people remain generous, creative, committed to others and feeling needed and connected to others. An example item includes, "I try to pass along the knowledge I have gained through my experiences."

The LGS items are thought to cover many of the most salient ideas in the theoretical literature on generativity (McAdams & de St. Aubin, 1992). Items directly concern passing on knowledge and skills to others and the next generation, making significant contributions to the betterment of one's community, being creative and productive, and caring and taking responsibility for other people. In two studies of adult and college students used to compose the current version, Chronbach's alpha for the adult sample was .83 and the college sample .84. In terms of discriminant validity, McAdams and de St. Aubin reported that a measure of social desirability and the LGS were weakly correlated at  $r = .17$ .

It was predicted that exemplars' average score on the Loyola Generativity Scale (LGS) would exceed the normative mean LGS score of 40 to 41 by at least 10%. It was also predicted that the LGS would be positively and significantly correlated with the SAWS.

#### *Mindful Attention Awareness Scale (MAAS)*

In order to assess mindfulness, the Mindful Attention Awareness Scale (MAAS) was employed. Developed by K. Brown and Ryan (2003), this 15-item scale measures the frequency of mindful states in day-to-day life, using both general and situation-specific statements. Based on a mean of all items, MAAS scores can range from 1 to 6. Higher scores indicate greater mindfulness.

In a large U.S. adult sample ( $n = 237$ ), the average MAAS score was 4.22 ( $SD = 0.63$ ). Factor analyses of college ( $N = 329$ ) and national adult sample data showed a single-factor structure (K. Brown & Ryan, 2003). A positive correlation has also been found between the MAAS and measures of emotional intelligence, self-esteem, and the NEO Openness to Experience (K. Brown & Ryan, 2003). Sample items include, "I could be experiencing some emotion and not be conscious of it until sometime later" and "I find it difficult to stay focused on

what's happening in the present" (p. 26). It was predicted that exemplars' average score on the Mindful Attention Awareness Scale (MAAS) would exceed the average MAAS score of a U.S. adult sample ( $M = 4.22$ ) by at least 10%.

The pattern of associations indicates that higher scorers on the MAAS tend to be more receptive to and aware of inner experiences and are more mindful of their overt behavior. They are more likely to fulfill basic psychological needs, and are more attuned to their emotional states and able to alter them. Conversely, such individuals are less likely to be socially anxious, self-conscious, and ruminative than low scorers and are also slightly less likely to enter absorptive states of consciousness. They are generally not more likely to be reflective or to engage in self-scrutiny but appear to value intellectual pursuits slightly more than lower scorers.

#### *Narcissistic Personality Inventory-16 (NPI-16)*

In order to assess subclinical narcissism, the NPI-16 was employed. The NPI-16 is a 16-item self-report scale created by Ames et al. (2006) to be a shorter, unidimensional version of the 40-item NPI. Participants choose between two responses, a narcissistic response and a non-narcissistic response. Sample pairings include: "I think I am a special person" versus "I am no better or worse than most people." Narcissism is defined as "an important complex of personality traits and processes that involve a grandiose yet fragile sense of self and entitlement as well as a preoccupation with success and demands for admiration" (Ames et al., 2006, p. 441). Because there is a high volume of measures used in the present study, a shorter version which maintained the original construct integrity was a practical choice.

In a study utilizing 43 full-time graduate students in business, average age 28.33 (Ames et al., 2006), the NPI-16 was compared to the full 40-item NPI to measure internal consistency. The two measures were correlated at  $r = .90$  with  $p < .001$ . In the same published study (Ames et



al., 2006), 1558 undergraduates took the NPI-16 5 weeks apart to assess reliability. Results were stable  $r = .85$  with  $p < .001$ . The NPI has been positively correlated with openness, extraversion, self-esteem, and self-monitoring.. Ames et al. (2006) also found that men scored higher than women in narcissism. The business school sample scored ( $M = .39$ ,  $SD = .18$ ) on the NPI-16. It was predicted that exemplars' average scores on the NPI-16 would fall below the mean normative NPI-16 score of ( $M = .39$ ,  $SD = .18$ ) by at least 10%.

#### *Washington University Sentence Completion Test (WUSCT)*

In order to measure ego development, the WUSCT (Hy & Lovinger, 1996; Lovinger, 1985; Lovinger & Wessler, 1970) was utilized. The WUSCT is a semi-projective technique that consists of 36 items which participants are asked to complete. Trained raters then code each response according to a detailed scoring manual.

For this particular study, the WUSCT was recommended by Roger Walsh, eminent transpersonal researcher and theorist, as the best current measure of ego development (R. Walsh, personal communication, November 26, 2008). It is particularly relevant because its components, character development, cognitive style, interpersonal style, and conscious preoccupations are related to, and suggestive of, an exemplar's personal development.

Noam and colleagues (2006), after comprehensively reviewing hundreds of studies, found that generally, the test-retest reliability, inter-rater reliability, and internal consistency to be adequate in normal and clinical populations. Manners and Durkin (2001) additionally found significant construct validity. It was hypothesized that exemplars' average score on the WUSCT would exceed the highest conventional stage of adult development, the Achiever, 4.0.

### *Big Five Inventory (BFI)*

In order to assess the Big Five personality traits of extraversion, neuroticism, agreeableness, openness, and conscientiousness, The Big Five Inventory (BFI) (John & Srivastava, 1999), composed of 44 items, was employed. Each trait is measured with between 8 and 10 items and contains a mixture of positively and negatively coded items on a 5-point Likert scale from 1 = *disagree strongly* to 5 = *agree strongly*. Examples include “Is outgoing, sociable” (Extraversion), “Worries a lot” (Neuroticism), “Has an active imagination” (Openness to Experience), “Does things efficiently” (Conscientiousness), and “Has a forgiving nature” (Agreeableness). The BFI is relevant for the current research as it can assess generally agreed upon and stable aspects of personality in exemplars.

The Big Five Inventory (BFI) is one of the mostly commonly and widely used measures of the Big Five. For each trait, Cronbach’s alpha and test-retest reliability have been shown to range from .79 to .90, and each subscale correlates with the corresponding scale of the NEO Personality Inventory-Revised (Costa & McCrae, 1992) and the Trait Descriptive Adjectives (Goldberg, 1992) at between  $r = .83$  and  $r = .99$  (mean  $r = .94$ ; John & Srivastava, 1999). It was hypothesized that exemplars’ average score on the Big Five Inventory (BFI) Openness to Experience would exceed the normative mean BFI Openness to Experience score of 3.80 (SD = .73) by at least 10%. It was also predicted that Openness to Experience would be positively and significantly correlated with the SAWS.

### *Humility Inventory (HI)*

In order to assess humility, the Humility Inventory (S. Brown, Scharldi, & Wroblewski, 2003) was employed. Humility was measured on a 15-item 5-point Likert-type scale from *strongly agree* to *strongly disagree*. Items were developed from theoretical constructs from the

literature and a content analysis of participant definitions of humility. Example items include “I accept it that things don’t always go my way” and “It’s ok if others aren’t impressed with me.” Draft items were refined or eliminated based on results from expert evaluation and pilot testing.

Ninety-three undergraduates were asked to define humility in their own words, providing 169 individual definitions of humility (S. Brown et al., 2003). A content analysis revealed that these definitions could be grouped into five primary constructs with at least three responses each. In order of mention these are: Esteem for others/recognizing other’s strengths (41), lack of superiority/excessive pride or modesty (36), acceptance of own failability/willingness to acknowledge own weaknesses (18), systemic perspective/seeing place in the world/needing help from others (10), and low need for recognition/special treatment (3). The HI is a newly developed instrument that has yet to be used in psychological wisdom research. It was predicted that the Humility Inventory would be positively and significantly correlated with the Self-Assessed Wisdom Scale (SAWS).

### *Data Analysis*

#### *Transcript Analysis*

Qualitative data from the current study was examined by performing a thematic analysis (Braun & Clarke, 2006). Each transcript was read at least three times upon its reception, and computer-assisted text analysis using MAXQDA (Verbi Software, 2007) was employed for coding and organizing the interviews. MAXQDA is used in a wide range of academic and non-academic disciplines, including sociology, political science, psychology, public health, anthropology, education, marketing, economics and urban planning (Hawes, 2006). Advantages include its flexibility, user friendliness, and highly advanced visualization for the processes of coding, memo writing, and browsing. An essentialist or realist approach was then taken which

“reports experiences, meanings, and the reality of participants” (Braun & Clarke, 2006, p. 81). Theoretical, or pre-established areas of interest, and inductive methods or data driven themes were assessed.

In service of illuminating the lives and opinions of exemplars, the researcher explored pre-established categories consistent with the interview questions/research areas as well as additional emergent themes. Emergent themes are defined as common patterns that were observed in the final analysis, but not derived from previous notions. In sum, the goal of the qualitative methodology was the emergence of a larger, more in-depth picture through a detailed description of categories, patterns, and themes for all co-participants included (Gross, 1995).

In order to operationalize this approach, the six-phase process of Braun and Clarke (2006) was employed. First, the researcher became familiar with the data, including having the interviews transcribed, reading and re-reading the data, and noting initial ideas. Second, initial codes were generated across the entire data set based on intensity, density, and frequency. Third, codes were collated into themes, and themes were searched for and data relevant to each theme was gathered. Fourth, themes were reviewed and checked. Fifth, themes were named and defined, generating clear definitions and names for each theme. Finally, the report was produced with extract examples.

Advantages of the TA include its flexibility, accessibility to researchers with little or no experience of qualitative research, ability to highlight similarities and differences across the data set, capacity to generate unanticipated insights, and accessible results for the educated general public. Disadvantages included the difficulty of retaining a sense of continuity and contradiction through any one individual account.

### *Quantitative Analysis*

The SAWS, FVS, SWLS, MAAS, LGS, STAI, HI, WUSCT, BFI, and SPS were first scored. Within group results followed and included measures of center and spread. Confirmatory hypotheses were then tested, and are listed again in the last section of Chapter 3 and the beginning of Chapter 4.

A Pearson product-moment correlation coefficient was employed as a measure of the correlation (linear dependence) between two variables, in this case the SAWS and the LGS, MAAS, BFI Openness, HI, and SPS. In addition, correlations were run with various other demographic categories, including gender, education level, and age, giving a value between +1 and -1 inclusive. The correlation coefficient is sometimes called Pearson's  $r$ .

All findings were communicated through narrative report and statistical presentations, including charts and tables. Limitations and delimitations can be found at the conclusion of Chapter 5.

### *Summary of Study Hypotheses*

The quantitative findings are confirmatory and address multiple hypotheses related to assessing exemplar's wisdom-related qualities and characteristics:

It was hypothesized that Exemplars' average score on the Self-Assessed Wisdom Scale would exceed the cutoff score considered to be wise, 201.6.

Second, it was hypothesized that exemplars' average scores on the Loyola Generativity Scale (LGS), Mindful Attention Awareness Scale (MAAS), Satisfaction with Life Scale (SWLS), Big Five Inventory (BFI) Openness to Experience, and Spiritual Perspective Scale (SPS) would exceed the normative mean scores for each measure by at least 10%.

Third, it was hypothesized that exemplars' average scores on the State Trait Anxiety Inventory (STAI), Perceived Stress Scale (PSS-10), and Narcissistic Personality Inventory (NPI-16) would fall below the mean normative scores of each measure by at least 10%.

Fourth, it was hypothesized that exemplars' average score on the WUSCT would exceed the highest conventional stage of adult development, the Achiever, 4.0.

Fifth, it was hypothesized that there would be statistically significant ( $p = .05$ ) positive correlations between the Self-Assessed Wisdom Scale (SAWS) and: BFI Openness to Experience, Spiritual Perspective Scale (SPS), Mindful Attention Awareness Scale (MAAS), and Loyola Generativity Scale (LGS).

The qualitative findings of the study are exploratory and addressed three general research areas: *What are exemplars' wisdom-related qualities? What are exemplars' lives like? What are exemplars' opinions of wisdom?*

## Chapter 4: Results

The purpose of this chapter is to report the quantitative and qualitative findings of the study. The quantitative findings are confirmatory and address multiple hypotheses related to assessing exemplars' wisdom-related qualities and characteristics:

It was hypothesized that exemplars' average score on the Self-Assessed Wisdom Scale would exceed the cutoff score considered to be wise, 201.6.

Second, it was hypothesized that exemplars' average scores on the Loyola Generativity Scale (LGS), Mindful Attention Awareness Scale (MAAS), Satisfaction with Life Scale (SWLS), Big Five Inventory (BFI) Openness to Experience, and Spiritual Perspective Scale (SPS) would exceed the normative mean scores for each measure by at least 10%.

Third, it was hypothesized that exemplars' average scores on the State Trait Anxiety Inventory (STAI), Perceived Stress Scale (PSS-10), and Narcissistic Personality Inventory (NPI-16) would fall below the mean normative scores of each measure by at least 10%.

Fourth, it was hypothesized that exemplars' average score on the WUSCT would exceed the highest conventional stage of adult development, the Achiever, 4.0.

Fifth, it was hypothesized that there would be statistically significant ( $p = .05$ ) positive correlations between the Self-Assessed Wisdom Scale (SAWS) and: BFI Openness to Experience, Spiritual Perspective Scale (SPS), Mindful Attention Awareness Scale (MAAS), and Loyola Generativity Scale (LGS).

The qualitative findings of the study are exploratory and addressed three general research areas: *What are exemplars' wisdom-related qualities? What are exemplars' lives like? What are exemplars' opinions of wisdom?*

The chapter is organized into seven sections:

1. The first section offers a short reflection on results reporting.
2. The second section provides a concise summary of the findings.
3. The third section reports the demographics and background of the co-participants.
4. The fourth section reports on confirmatory hypotheses related to assessing exemplars' wisdom-related qualities and characteristics.
5. The fifth section reports results of qualitative exemplar wisdom-related qualities and characteristics from nominator narratives, nominators' completion of the Foundational Value Scale (FVS), and the 20 semi-structured interviews with exemplars.
6. The sixth section reports the qualitative results relating to exemplars' lives based on nominator narratives and exemplar interviews.
7. The seventh section explores the qualitative results of exemplars' opinions of wisdom.

### *Section 1: Reflection on Results Reporting*

Wisdom is an inherently complex issue, and in itself is resistant to even our best attempts to define it (Sternberg, 1998; Trowbridge, 2005). In an effort to honor wisdom's complexity, the researcher tries in subsequent sections to balance being brief with being comprehensive.

Thorough organization, tables and charts, and summaries have been provided to aid in the process.



The following results are intended to evoke hypotheses and reflections from the reader that contribute to the conversation of wisdom in general, and the discussion in particular, of the lives of those who might seem to have experienced it.

Looking ahead, Chapter 5 integrates existing psychological literature with these findings and the researcher's reflections.

## *Section 2: Brief Summary of Findings*

### *Demographics*

The study was comprised of two samples, the exemplar group ( $n = 20$ ) and nominator group ( $n = 15$ ) group. Exemplars' average age was 69.5 years, approximately 10 years greater than the average nominator age. Nominators knew exemplars on average 25 years in multiple contexts, most often having exemplars as their colleagues and teachers. Exemplars were predominantly Caucasian, very well educated, and most were married or had a significant other. Nearly all reported having a current religious or spiritual tradition and practice.

### *Exemplars' Wisdom-Related Qualities and Characteristics*

*Self-Report Measures.* The average exemplar score on the Self-Assessed Wisdom Scale exceeded the cutoff considered to be wise 201.6, consistent with the prediction. Exemplars' average scores on the Loyola Generativity Scale (LGS), Mindful Attention Awareness Scale (MAAS), Satisfaction with Life Scale (SWLS), Big Five Inventory (BFI) Openness to Experience, and Spiritual Perspective Scale (SPS) exceeded the normative mean scores for each measure by at least 10%, consistent with the prediction.

Exemplars' average scores on the State Trait Anxiety Inventory (STAI) and Perceived Stress Scale (PSS-10) fell below the mean normative scores of each measure by at least 10%, consistent with the prediction. Exemplars' average scores on the Narcissistic Personality

Inventory (NPI-16) and STAI Trait-Anxiety did not fall below the mean normative scores of each measure by at least 10%, inconsistent with the prediction. Exemplars' average score on the WUSCT exceeded the highest conventional stage of adult development, the Achiever, 4.0, consistent with the prediction.

*Pearson product-moment correlation coefficient.* There were found to be statistically significant positive correlations between the Self-Assessed Wisdom Scale (SAWS) and: BFI Openness to Experience, Spiritual Perspective Scale (SPS), and Humility Inventory (HI), consistent with the prediction. There were found to be positive, but not significant correlations between the Self-Assessed Wisdom Scale (SAWS) and: Mindful Attention Awareness Scale (MAAS) and Loyola Generativity Scale (LGS), inconsistent with the prediction. These results suggest that higher levels of wisdom were correlated with increases in openness, humility, and the importance of spirituality.

#### *Qualitative Exemplar Wisdom-Related Qualities and Characteristics*

*Nominator narratives and exemplar interviews.* Six significant personal qualities were found in the nominator narratives about exemplars: honesty, compassion, spirituality, integration, understanding, and openness. Four core personal qualities were found in the semi-structured exemplar interviews: they tell the truth, are able to tolerate uncertainty, are grateful and appreciative, and are funny and lighthearted.

*Foundational Value Scale.* Exemplar qualities rated most highly by nominators on the Foundational Value Scale (FVS) were intelligence, having a sense of meaning and purpose, harmoniousness, and spirituality. The lowest scoring qualities were genius and being animated.

### *Exemplars' Lives*

*Nominator narratives.* Overall, nominators described exemplars as deeply engaged in life and meaningful relationships. This finding was evidenced by exemplars' personal impact on the nominators, painful life experiences, valuing helping others, being sought out for counsel, the validation of peers, and remaining in contact with their own experience.

*Semi-structured interviews.* Three core themes were uncovered through analysis in the semi-structured interviews about exemplars lives. First, exemplars reported deeply meaningful encounters and intimate connections with mentors and loved ones. Second, spirituality is important, as reflected in exemplars' beliefs and practices, including the unity of spirituality and life, practicing meditation, attending retreats, and having access to a reflective articulation process. Finally, exemplars are guides for others and have an impactful presence as luminaries, transformational catalysts, and teachers with specific means of sharing with others.

### *Exemplars' Opinions of Wisdom*

Exemplars defined wisdom as arising from the unknown and as practical. They offered multiple (technologies) strategies for the cultivation of wisdom-related processes, primarily the relationship with a mentor, although there was disagreement about whether wisdom itself was teachable. Some examples of wise behavior included connecting with another human being, restraining action, and making an important life decision without knowing why. Exemplars thought that people are wise about different things and nominated predominantly spiritual and religious figures as wise.

The following chapter expands on the results reported above. Findings will be reflected on for meaning, significance, and integration in Chapter 5.

#### *Section 4: Exemplar Demographics and Background*

##### *Place of Residence*

As can be viewed in Table 1, 20 participants came from seven states in the United States. The highest number of participants, 11 (55%), came from California.

##### *Gender and Age*

In the exemplar group, 7 (35%) women and 13 (65%) men took part in the study. The average age of the participants was 69.35 years. There was a 45-year age gap (range) between the oldest and the youngest participants, who were 86 and 41 respectively, and both of these participants were female. See Tables 2 and 3 for more detail.

##### *Ethnic Background and Level of Education*

As can be viewed in Table 4, the majority of exemplars 13 (65%) were Caucasian. The average number of years of education was 20.6 ( $SD = 2.71$ ), with a range of 26 to 16 years. All exemplar participants (100%) held bachelor's degrees and 11 (55%) held doctoral degrees.

##### *Marital Status and Children*

Sixteen (80%) participants were married or had significant others. Fifteen (75%) participants had children, and the average number of children for the group was 2.1. More information can be found in Table 5.

##### *Religious Tradition and Spiritual Practice*

As indicated in Table 6, 17 exemplars (85%) reported having a current religious or spiritual tradition, while 16 (80%) had a spiritual practice. Eleven (55%) cited various types of meditation as their practice, and within that group, 7 practiced meditation for 25 years or more. Fifty percent of the total exemplar group reported having multiple spiritual practices.

### *Occupations, Professions, and Socioeconomic Status*

As seen in Table 7, exemplars (are) predominantly writers, university professors, psychotherapists, and spiritual professionals. Seventeen (85%) reported good or excellent socioeconomic status.

### *Section 3: Nominator Demographics and Background*

#### *Place of Residence*

As can be viewed in Table 1, 15 participants came from four states in the Western United States. The highest number of participants, 11 (55%), came from California.

#### *Gender and Age*

As seen in Tables 2 and 3, 7 females (46.7%) and 8 males (53.3%) nominated 30 exemplars, 20 (66%) of which participated. The average age was 59.8 years, with 36 years separating the youngest participant, who was 41, and oldest, who was 77.

#### *Ethnic Background and Level of Education*

Twelve nominators (80%) identified themselves as Caucasian. The average number of years of education was 22.07, with a range of 18 to 30 years. Ten nominators (66.6%) held doctoral degrees, and all held bachelor's degrees. See Table 4 for more details.

#### *Marital Status and Children*

As seen in Table 5, 8 nominators (53.3%) were married, 3 (20%) were single, 2 (13.3%) were divorced, and 2 (13.3%) were vowed religious. Eight (53.3%) reported having children, and the average number of children was 1.2.

A summary of demographic information is presented in Table 8.

### *Religious Tradition and Spiritual Practice*

As indicated in Table 6, all 15 nominators (100%) reported having a religious/spiritual tradition. All 15 (100%) also reported having a spiritual practice, and 9 (60%) named some type of meditation as their practice.

### *Occupations, Professions, and Socioeconomic Status*

As expected, because of the aforementioned search criteria, nominators were predominantly university professors and teachers, psychologists and counselors, and spiritual professionals. See Table 7 for more information.

Nominators, on average, knew exemplars 25 years in multiple contexts, most often having exemplars as their teachers and colleagues. Eighty-five percent of nominators reported good or excellent socioeconomic status.

Table 1

### *Demographics: Summary of Participants' Places of Residence by Groups*

Residence	Nominators ( <i>n</i> = 15)	Exemplars ( <i>n</i> = 20)
Arizona	1	2
California	11	11
Colorado	0	1
Massachusetts	0	2
New Mexico	1	1
Oregon	2	2
Wisconsin	0	1

Table 2

*Demographics: Gender by Groups*

Gender	Nominators ( <i>n</i> = 15)	Exemplars ( <i>n</i> = 20)
Female	7	7
Male	8	13

Table 3

*Demographics: Age by Groups*

Ages	Nominators ( <i>n</i> = 15)	Exemplars ( <i>n</i> = 20)
35-44 yrs.	1	1
45-54 yrs.	2	0
55-64 yrs.	9	4
65-74 yrs.	2	9
75-84 yrs.	1	6

Table 4

*Demographics: Ethnic Background by Groups*


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Ethnic background	Nominators ( <i>n</i> = 15)	Exemplars ( <i>n</i> = 20)
Anglo, Arabic, Native American	1	0
British Isles, Native American	0	1
Caucasian	12	13
English, Canadian, French, Cree	0	1
Italian American	1	0
Jewish	1	1
Norwegian/Swedish	0	1
No Response	0	2
Identify with all ethnicities	0	1

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Table 5

*Demographics: Relationship Status by Groups*

Relationship status	Nominators ( <i>n</i> = 15)	Exemplars ( <i>n</i> = 20)
Married/partnered	8	13
Single	3	3
Significant other	0	3
Divorced	2	1
Vowed religious	2	0
Widowed	0	1

Table 6

*Demographics: Current Religious/Spiritual Orientation by Groups*

Orientation	Nominators (n = 15)	Exemplars (n = 20)
Buddhist	3	3
Christian and Buddhist	1	1
Catholic and Buddhist	1	0
Catholic/Hindu/Buddhist/Nondual/Shamanic	0	1
Eclectic Buddhist	1	0
Jewish/Buddhist	1	0
Eclectic / non traditional	0	1
Episcopalian	0	2
Evangelical Lutheran	1	0
Christian Progressive	1	0
United Methodist	0	2
Roman Catholic	2	1
Wiccan	0	1
Non-dual	0	1
Paganism/goddess	0	1
UCC	1	0
UCC / Roman Catholic	0	1
Nature based	1	0
Student world traditions	1	1
Many paths	1	0
Other	0	1
No response	0	1
None	0	1
N/A	0	1

Table 7

*Demographics: Occupations and Professions by Groups: Exemplars and Nominator*

Occupation/profession	Nominators frequency	Exemplars frequency
Psychiatry	0	1
Writer / author	0	8
Priest / pastor / minister	1	2
Psychotherapy	1	7
Psychologist	4	2
Counselor	1	1
University professor	8	5
Meditation teacher	1	3
Homemaker	0	1
Research psychologist	1	2
Transpersonal psychologist	0	2
Spiritual teaching	2	2
Spiritual guide / director	4	2
Retired	2	2
Pastoral counselor / psychotherapist	2	2
Teacher / educator	1	1
Editor	0	2
Non-profit director	2	2
Counseling center director	1	0
Hypnotherapist	0	1

Table 8

*Demographics: Summary of Exemplars and Nominators*

Demographics	Nominators	Exemplars
<i>N</i>	15	20
Male	53.3%	65%
Female	46.7%	35%
Average age	59.8	69.35
Oldest	77	86
Youngest	41	41
Caucasian	80%	65%
Married	53.3%	65%
Significant other	0%	15%
Single	20%	15%
Divorced	13.3%	5%
Widowed	13.3%	5%
Vowed religious	13.3%	0%
Have Children	53.3%	75%
Average # children	1.2	2.1
Average years of education	22.07	20.6
% Religious/spiritual tradition	100%	85%
% Spiritual practice	100%	80%

*Section 5: Quantitative Self-Report Exemplar Wisdom-Related Qualities and Characteristics*

Twenty exemplars were given the Self-Assessed Wisdom Scale (SAWS), State-Trait Anxiety Inventory (STAI), Perceived Stress Scale (PSS-10), Spiritual Perspective Scale (SPS), Satisfaction With Life Scale (SWLS), Loyola Generativity Scale (LGS), Mindful Attention Awareness Scale (MAAS), Narcissistic Personality Inventory-16 (NPI-16), Humility Inventory (HI), Big Five Inventory (BFI), and the Washington University Sentence Completion Test (WUSCT).

Ninety percent of measures were completed online and all were ordered the same for each exemplar. Two exemplars were sent paper copies to complete, one as a request because she is online “too often” and the other because she is not online at all. The WUSCT was scored by an expert outside rater who was familiar with higher-level developmental scoring.

This section reports on exemplar wisdom-related qualities derived from the study confirmatory hypotheses. In addition, Table 9 shows the mean scores and standard deviations of normative samples and exemplars.

Table 9

*Mean Scores and Standard Deviations of Normative Samples and Exemplars*

Measure	Normative mean	Normative <i>SD</i>	Exemplars mean	Exemplars <i>SD</i>
LGS	40.5	6.62	46.2	5.92
MAAS	4.22	.63	4.83	.50
SWLS	24.2	6.9	31.1	3.23
BFI-Openness	3.80	.73	4.35	.49
SPS*	4.85	1.36	5.95	1.18
STAI-State	33.6	9.5	26.10	4.94
STAI-Trait	32.82	8.32	27.56	3.84
PSS-10	15.83	7.5	9.9	4.6
NPI-16	.39	.18	.47	.08

*Note.* MAAS = Mindful Attention Awareness Scale; SWLS = Satisfaction With Life Scale; LGS = Loyola Generativity Scale; PSS = Perceived Stress Scale; SPS = Spiritual Perspective Scale; STAI-State = State-Trait Anxiety Inventory State Scale; STAI-Trait = State-Trait Anxiety Inventory Trait Scale; NPI = Narcissistic Personality Inventory-16; SAWS = Self Assessed Wisdom Scale; HI = Humility Inventory.

\*adjusted to 7.0 scale.

### *Hypotheses 1*

Exemplars' average score on the Self-Assessed Wisdom Scale would exceed the cutoff score considered to be wise, 201.6.

*Result.* The average exemplar score on the Self-Assessed Wisdom Scale was 203.55 ( $SD = 25.31$ ). This finding means that exemplars exceeded the cutoff considered to be wise, consistent with the prediction.

*Self-Assessed Wisdom Scale (SAWS).* Eleven of 20 (55%) exemplars scored over 201.6, meaning that just over half of the exemplars scored in the wise range. The highest score was 237 and the lowest 153, with a resulting range of 84.

The two highest single-item scores out of 6.0 on the SAWS were stem number 36 ( $M = 5.9$ ,  $SD = .31$ ), "I've learned valuable life lessons from others," and stem number 11 ( $M = 5.75$ ,  $SD = .55$ ), "I have dealt with a great many different kinds of people during my lifetime." Conversely, the lowest scoring items were stem number 13 ( $M = 3.85$ ,  $SD = 1.6$ ), "I reminisce quite frequently," and stem number 30 ( $M = 3.85$ ,  $SD = 1.3$ ) "I like being around persons whose views are strongly different from mine."

Internal validity for the SAWS averaged .828 as scale factors correlated positively and significantly with the overall score, as is represented in Table 10, and below. This means that there is some validity to the relationship between the subscales and the overall scale, or the construct of wisdom as defined by these particular qualities (factors).

1. Humor ( $r = .91$ ,  $p = .001$ ).
2. Reminiscence and Reflectiveness ( $r = .869$ ,  $p = .001$ ).
3. Experience ( $r = .857$ ,  $p = .001$ ).
4. Openness ( $r = .817$ ,  $p = .001$ ).

5. Emotional Regulation ( $r = .689, p = .001$ ).

### *Hypothesis 2*

Exemplars' average scores on the Loyola Generativity Scale (LGS), Mindful Attention Awareness Scale (MAAS), Satisfaction With Life Scale (SWLS), Big Five Inventory (BFI) Openness to Experience, and Spiritual Perspective Scale (SPS) would exceed the normative mean scores for each measure by at least 10%.

*Result.* Exemplars' average scores on the Loyola Generativity Scale (LGS), Mindful Attention Awareness Scale (MAAS), Satisfaction with Life Scale (SWLS), Big Five Inventory (BFI) Openness to Experience, and Spiritual Perspective Scale (SPS) exceeded the normative mean scores for each measure by at least 10%, consistent with the prediction.

*Loyola Generativity Scale (LGS).* The average exemplar score for the LGS was 46.2 ( $SD = 5.93$ ). This finding means that exemplars exceeded the normative LGS score of 40 to 41 by 10.4%, consistent with the prediction.

Fifteen of 20 (75%) exemplars scored above 40 to 41, 2 of 20 (10%) exemplars (10%) scored exactly 41, and 3 of 20 (15%) exemplars scored below 40 to 41. This finding means that 75% of exemplars showed above-average generativity, 10% showed average generativity, and 15% had below-average generativity.

The highest exemplar score on the LGS was 55 and the lowest was 35. Single item scores ranged from 0 = *statement never applies to you* to 3 = *statement applies to you very often or nearly always*. Exemplars scored highest on items number 1 ( $M = 2.60, SD = .50$ ), number 4 ( $M = 2.60, SD = .75$ ), and number 17 ( $M = 2.60, SD = .60$ ), "I try to pass along the knowledge I have gained through my experiences, I feel as though I have made a difference to many people," and "Other people say that I am a very productive person," respectively. By contrast, exemplars



scored lowest on lowest on item number 15 ( $M = .2$ ,  $SD = .41$ ), “I feel as though I have done nothing of worth to contribute to others.”

*Mindful Attention Awareness Scale (MAAS)*. The average exemplar score for the MAAS was 4.83 ( $SD = .50$ ). This finding means that exemplars exceeded the U.S. adult sample average score of 4.22 by 10.3%, consistent with the prediction.

Eighteen of 20 (90%) exemplars scored above 4.20, 2 of 20 (10%) exemplars (10%) scored below 4.20. This finding means that 90% of exemplars showed above-average mindfulness, 10% had below-average mindfulness.

Individual item scores range from 1 to 6; the higher scores reflect greater mindfulness. Exemplars scored highest in mindfulness on item 12 ( $M = 5.75$ ,  $SD = .54$ ), responding *almost never* to “I drive places on automatic pilot and then wonder how I got there.” Exemplars scored lowest in mindfulness on item 6 ( $M = 3.33$ ,  $SD = .91$ ), responding *somewhat frequently* to “I forget a person’s name almost as soon as I’ve been told it for the first time.”

*Satisfaction With Life Scale (SWLS)*. The average exemplar score for the SWLS was 31.10 ( $SD = 3.23$ ). This finding means that exemplars exceeded the older American adult sample mean by 19.8%, consistent with the prediction.

Nineteen of twenty (95%) exemplars scored above 24.2, one of 20 (5%) exemplars scored below. This finding means that 95% of exemplars showed above average satisfaction with life, and 5% showed below average life satisfaction.

The Satisfaction with Life Scale (SWLS) breaks down into the following scoring categories: 30 to 35 is a “very high score” indicating the respondents are highly satisfied; 25 to 29 is a “high score” reflecting respondents are quite satisfied but aware that their lives are not perfect; 20 to 24 is an “average score” where the bulk of most populations in economically

developed countries will fall; 15 to 19 is “slightly below average” in life satisfaction often reflecting a respondent’s possible feeling of overwhelm from a number of smaller problems across different areas of life (Diener et al., 1985). This composite score of 31.1 reflects that exemplars have a very high degree of satisfaction with life.

SWLS statements were scored from 1 = *strongly disagree* to 7 = *strongly agree*. The item that exemplars scored highest on, or strongly agreed with, was number 4 ( $M = 6.65$ ,  $SD = .59$ ), “So far I have got the important things I want in life.” They scored lowest relatively, but still highly, on item 1 ( $M = 6.15$ ,  $SD = 1.04$ ), “My life is close to my ideal.”

*Big Five Inventory (BFI)*. The average exemplar score for the BFI Openness to Experience was 4.35 ( $SD = .49$ ). This finding means that exemplars exceeded the normative BFI Openness to Experience score of 3.8 by 11%, consistent with the prediction.

Seventeen of 20 (85%) exemplars scored above 3.8, 1 of 20 (5%) exemplars scored exactly 3.8, and 2 (10%) exemplars scored below 3.8. This finding means that 85% of exemplars showed above-average openness to experience, and 15% showed average or below-average openness to experience.

Individual item scores on the BFI Openness range from 1 to 5; the higher scores reflect greater openness to experience. Exemplars scored highest in openness on item 40 ( $M = 4.8$ ,  $SD = .41$ ), responding *agree strongly* to “Likes to think and play with ideas.” Exemplars scored lowest in openness on item 44 ( $M = 4.0$ ,  $SD = .97$ ), responding *agree a little* to “Knows a lot about art, music, or books.”

*Spiritual Perspective Scale (SPS)*. The average exemplar score for the SPS was 5.95 ( $SD = 1.18$ ). This finding means that exemplars exceeded the adjusted normative SPS score of 4.85 ( $SD = 1.36$ ) by 15.7%, consistent with the prediction.

Seventeen of 20 (85%) exemplars scored above 4.85, 3 of 20 (15%) scored below 4.85. This finding means that 85% of exemplars showed above average importance of spirituality in their lives and 15% had below-average importance of spirituality in their lives.

Statements were scored from 1 to 7 with the first five questions 1 = *Not at all* and 7 = *More than once a day* and the last five items 1 = *N/A* and 7 = *Strongly agree*. The item that exemplars scored the highest on, or *agreed to strongly agreed* with, was number 9 ( $M = 6.7$ ,  $SD = .73$ ), “My spiritual views have had an influence upon my life.” Conversely, they scored relatively lowest on question number 6 ( $M = 5.3$ ,  $SD = 2.25$ ), “I seek spiritual guidance in making decisions in my everyday life.”

### *Hypothesis 3*

Exemplars’ average scores on the State Trait Anxiety Inventory (STAI), Perceived Stress Scale (PSS-10), and Narcissistic Personality Inventory (NPI-16) would fall below the mean normative scores of each measure by at least 10%.

*Result.* State Trait Anxiety Inventory (STAI) and Perceived Stress Scale (PSS-10) fell below the mean normative scores of each measure by at least 10%, consistent with the prediction. Exemplars’ average scores on the Narcissistic Personality Inventory (NPI-16) and STAI Trait-Anxiety did not fall below the mean normative scores of each measure by at least 10%, inconsistent with the prediction.

*State-Trait Anxiety Inventory (STAI).* The mean score for the exemplar group on the STAI, State-Anxiety, was 26.10 ( $SD = 4.94$ ). This finding means that exemplars scored 12.5% below the normative mean STAI State-Anxiety score, consistent with prediction.

The mean score for the exemplar group on the STAI, Trait-Anxiety was ( $M = 27.56$ ,  $SD = 3.84$ ). This finding means that exemplars scored 8.8% below the normative mean STAI Trait Anxiety score, inconsistent with prediction.

On the State-Anxiety scale, 18 of 20 (90%) exemplars scored below 33.6, 2 (10%) exemplars above 33.6. This finding means that 90% of exemplars showed below-average state anxiety compared to the norm, and 10% had above-average state anxiety.

On the Trait-Anxiety scale, 19 of 20 (95%) exemplars scored below 32.8, and 1 exemplar (5%) scored above 32.8. This finding means that 95% of exemplars showed below-average Trait anxiety compared to the norm, and 5% have above-average trait anxiety.

In general, State-Anxiety and Trait-Anxiety scores of 20 indicate no measurable anxiety or a desire to “fake good” (Spielberger, 1983, p. 6). Exemplars thus rated themselves with almost no state or trait anxiety. Relatively, the item reflective of the most anxiousness on the State-Anxiety scale was question number 4 ( $M = 1.55$ ,  $SD = .76$ ), “I feel strained,” and of the least anxiousness was item 9 ( $M = 1.0$ ,  $SD = 0$ ), “I feel frightened.” On the Trait-Anxiety scale, the item reflective of the most anxiousness was number 26 ( $M = 1.9$ ,  $SD = .72$ ), “I feel rested,” and the least anxiousness was number 40 ( $M = 1.1$ ,  $SD = .31$ ), “I get in a state of tension or turmoil as I think over my recent concerns or interests.”

*Perceived Stress Scale (PSS-10)*. The average exemplar score for the PSS-10 was ( $M = 9.9$ ,  $SD = 4.61$ ). This finding means that exemplars scored 14.9% lower than the normative PSS-10 sample, consistent with the prediction.

Seventeen of 20 (85%) exemplars scored below 15.83, 3 of 20 (15%) exemplars above 15.83. This finding means that 85% of exemplars showed below-average stress compared to the norm, and 15% had above-average stress.

The overall PSS-10 score ranges from 0 = *low degree of perceived stress* to 40 = *high degree of perceived stress*, and is measured on a 10-question, 5-point Likert scale. An average score of 9.9 means exemplars rated themselves with little to very little perceived stress.

The items relatively reflective of the highest perceived stress were, respectively, question number 1 ( $M = 1.50$ ,  $SD = .60$ ) and question number 3 ( $M = 1.50$ ,  $SD = .61$ ): “In the last month, have often have you been upset about something that happened unexpectedly?” and “In the last month, how often have you felt nervous or stressed?” Exemplars responded *never to almost never*. Conversely, the score reflective of the lowest perceived stress was question number 4 ( $M = .4$ ,  $SD = .75$ ), “In the last month how often have you felt confident about your ability to handle your personal problems?” Exemplars responded *fairly often to very often*.

*Narcissistic Personality Inventory-16 (NPI-16)*. The mean score for the exemplar group was ( $M = .47$ ,  $SD = .08$ ). This finding means that exemplars scored 8% higher than the normative NPI-16 sample, inconsistent with the prediction. Exemplars’ average score of .47 also means that 47% of their total responses were consistent with narcissism.

Fifteen of 20 (75%) exemplars scored above .39, 5 of 20 (25%) exemplars above .39. This finding means that 75% of exemplars showed above-average narcissism compared to the norm, and 25% had below-average narcissism.

The highest scoring exemplar item consistent with narcissism was number 10 ( $M = 1.0$ ), “I am an extraordinary person,” which 100% of exemplars selected, instead of “I am much like everybody else.” The lowest scoring item inconsistent with narcissism was number 6 ( $M = 0$ ), “I hope I am going to be successful,” which 100% of exemplars selected, instead of “I am going to be a great person.”

#### *Hypothesis 4*

Exemplars' average score on the WUSCT would exceed the highest conventional stage of adult development, the Achiever, 4.0.

*Result.* Exemplars average score on the WUSCT was 4.2. This finding means that exemplars' average score exceeded the Achiever stage of adult development, consistent with prediction.

*Washington University Sentence Completion Test (WUSCT).* Twelve of 20 (60%) exemplars scored at the Achiever Level (4), and 8 (40%) exemplars scored above the Achiever level. This finding means that 60% of exemplars did not exceed the Achiever stage of adult development, and 40% did exceed the Achiever stage of adult development.

The average exemplar score of 4.2 places exemplars between 4 = *a late third person (Achiever)* and 4/5 = *an early fourth person (Individualist)* stage of development. The highest exemplar score was a 5+ (Strategist) to 5/6 (Construct Aware / Ego Aware), and the lowest a 3/4, or Expert. The half numbers refer to the entry phase of a new stage perspective.

At the Achiever level, 4, persons are interested in reasons, causes, goals, consequences, and the effective use of time (Cook-Greuter, 1985, p. 19). They have an increasing capacity to observe their own motivations across different times and periods. They look for root causes and reasons, and because of their genuine interest in who others are and the need to share their experiences, interpersonal relationships become intense and meaningful. Cook-Greuter estimates that 80% of the population falls into conventional ego development stages, 3-4, of which Achiever, 4, is the highest.

At the Individualist 4/5 level, persons realize things are rarely what they seem, and begin to recognize the relativity of all positions. Intellectual logic gives way to a more holistic

understanding of things, or a more “organismic or embodied awareness” (Cook-Greuter, 1985, p. 23). They become now-oriented, begin to notice how feelings affect the body, and prepare the way for a deepening appreciation and tolerance of differences and similarities. They are interested in processes, relationships, and nonlinear influences among variables; they work to integrate multiple aspects of themselves. Cook-Greuter estimates that 10% of the population falls into post-conventional stages, 5-6, of which Individualist, 4/5, is the lowest stage of ego development. More will be said about this finding in Chapter 5.

*Exemplar Wisdom-Related Qualities: Pearson Product-Moment Correlation Coefficient*

A Pearson product-moment correlation coefficient was computed to assess the relationship between the composite wisdom scale (SAWS) and other measures thought to capture wisdom-related characteristics. See Table 10 for all correlations.

*Hypothesis 5*

There would be statistically significant positive correlations between the Self-Assessed Wisdom Scale (SAWS) and BFI Openness to Experience, Spiritual Perspective Scale (SPS), Mindful Attention Awareness Scale (MAAS), Humility Inventory (HI), and Loyola Generativity Scale (LGS).

**Result**

There were found to be statistically significant positive correlations between the Self-Assessed Wisdom Scale (SAWS) and: BFI Openness to Experience, Spiritual Perspective Scale (SPS), and Humility Inventory (HI), consistent with the prediction. There were found to be positive, but not significant correlations between the Self-Assessed Wisdom Scale (SAWS) and: Mindful Attention Awareness Scale (MAAS) and Loyola Generativity Scale (LGS), inconsistent

with prediction. These results suggest that higher levels of wisdom were correlated with increases in openness, humility, and the importance of spirituality.

*Big Five Inventory (BFI): Openness to Experience.* The BFI Openness correlated positively and significantly with the composite wisdom score ( $r = .656, p = .01$ ), consistent with prediction. This finding means that increases in wisdom were correlated with increases in openness to experience.

Note that BFI Openness to Experience was also the only scale to correlate positively and significantly with all five subscales of the SAWS: Openness ( $r = .666, p = .001$ ); Experience ( $r = .625, p = .003$ ); Emotional Regulation ( $r = .527, p = .017$ ); Humor ( $r = .493, p = .027$ ); and Reminiscence and Reflection ( $r = .492, p = .028$ ). This finding means that increases in BFI Openness to Experience were correlated with increases in SAWS Openness, Experience, Emotional Regulation, Humor, and Reminiscence and Reflection.

*Spiritual Perspective Scale.* The SPS correlated positively and significantly with the composite wisdom score ( $r = .49, p = .029$ ), consistent with prediction. This finding means that increases in wisdom were correlated with increases in the importance and salience of spirituality in exemplars' lives.

*Mindful Attention Awareness Scale.* The MAAS correlated positively but not significantly with the composite wisdom score ( $r = .14, p = .557$ ), inconsistent with prediction. This finding means that increases in wisdom were not significantly correlated with increases in mindfulness.

*Humility Inventory (HI): Composite score.* The Humility composite score correlated positively and significantly with the composite wisdom score ( $r = .537, p = .015$ ), consistent



with prediction. This finding means that increases in wisdom were correlated with increases in humility.

As an additional finding on the Humility Inventory, the Humility Inventory (HI) subscale Systemic Perspective correlated positively and significantly with the composite wisdom score ( $r = .582, p = .007$ ). This finding means that increases in wisdom were correlated with increases in systemic perspective. Systemic Perspective measures a systems view of reality.

*Loyola Generativity Scale.* The LGS correlated positively but not significantly with the composite wisdom score ( $r = .44, p = .052$ ), inconsistent with prediction. This finding means that increases in wisdom were not significantly correlated with increases in generativity.

Table 11

*Pearson Correlation Matrix of All Exemplar Self-Report Measures and the Self-Assessed**Wisdom Scale (SAWS)*

	SAWS	SAWS Exp	SAWS Emoti onal	SAWS Remin /Refl	SAWS Humor	SAWS Open
MAAS	.14	.06	.70**	-.52	.16	.06
	.557	.803	.000	.827	.481	.782
SWLS	-.07	-.15	.24	-.33	-.06	.28
	.742	.527	.293	.154	.796	.229
LGS	.44	.16	.49*	.31	.46*	.52*
	.052	.479	.026	.173	.041	.018
PSS	-.10	-.01	-.44*	.04	-.26	.01
	.653	.936	.048	.851	.258	.964
SPS	.48*	.41	.49*	.34	.54*	.39
	.029	.066	.028	.132	.013	.085
STATE	-.25	-.27	-.76**	.02	-.32	-.16
	.273	.250	.000	.929	.157	.500
TRAIT	-.16	-.13	-.55*	.12	-.30	-.15
	.491	.565	.011	.597	.193	.508
NPI	.14	.06	.37	.06	.18	.08
	.539	.801	.105	.787	.439	.726
SAWS	1.0**	.85**	.68**	.86**	.90**	.81**
	.000	.000	.001	.000	.000	.000
HI	.53*	.48*	.59*	.41	.54*	.30
	.015	.030	.006	.071	.013	.185
HI Other	.41	.36	.37	.27	.38	.42
	.070	.109	.107	.245	.090	.064
HI Syst	.58**	.52*	.45*	.52*	.51*	.36
	.007	.017	.042	.018	.019	.110
HI Need	.28	.07	.01	.22	.11	.15
	.216	.752	.945	.340	.626	.519

	SAWS	SAWS Exp	SAWS Emoti onal	SAWS Remin /Refl	SAWS Humor	SAWS Open
HI Accept.	.10	.25	.31	.60**	.01	.35
	.670	.281	.172	.005	.942	.125
BFI EXTR	.44	.66**	.23	.23	.47*	.36
	.051	.001	.314	.314	.034	.118
BFI AGRE	.15	.11	.27	.10	.24	.03
	.508	.633	.248	.648	.303	.874
BFI CONS	.25	.23	.59**	.16	.25	-.01
	.288	.319	.006	.500	.287	.968
BFI NEUR	-.10	-.14	-.45*	.09	-.22	.02
	.669	.533	.043	.688	.338	.911
BFI OPEN	.65**	.63**	.52*	.49*	.49*	.66**
v	.002	.003	.017	.028	.027	.001
WUSCT	-.00	-.12	.28	-.04	.02	-.01
	.982	.608	.226	.853	.911	.944

*Note.*  $n = 20$ . MAAS = Mindful Attention Awareness Scale; SWLS = Satisfaction With Life Scale; LGS = Loyola Generativity Scale; PSS = Perceived Stress Scale; SPS = Spiritual Perspective Scale; STATE = State-Trait Anxiety Inventory State Scale; TRAIT = State-Trait Anxiety Inventory Trait Scale; NPI = Narcissistic Personality Inventory-16; SAWS = Self Assessed Wisdom Scale; HI = Humility Inventory; HI Other = Humility Inventory subscale Other Esteem; HI Systemic = Humility Inventory subscale Systemic Perspective; HI Need: Humility Inventory subscale Need for Recognition; HI Acceptance: Humility Inventory Need for Acceptance; BFI EXTR = Big Five Inventory Extraversion; BFI AGRE = Big Five Inventory Agreeableness; BFI CONS = Big Five Inventory Conscientiousness; BFI NEUR = Big Five Inventory Neuroticism; BFI OPEN = Big Five Inventory Openness; WUSCT = Washington University Sentence Completion Test; SAWS Exp = Self Assessed Wisdom Scale Experience; SAWS Emotional = Self Assessed Wisdom Scale Emotional; SAWS REMIN = Self Assessed Wisdom Scale Reminiscence and Reflectiveness; SAWS Humor = Self Assessed Wisdom Scale Humor; SAWS Open = Self Assessed Wisdom Scale Openness.

\*  $p < .05$ . \*\* $p < .01$ .

*Section 6: Exemplar Wisdom-Related Qualities and Characteristics*

One qualitative finding of the study was exploratory and addressed the research area:

*What are exemplars' wisdom-related qualities?* Nominator narratives, the Foundational Value Scale, and Exemplar interviews were analyzed to answer this question.

*Nominator Narratives*

Six core qualities that were found in the nominator narratives about exemplars: honesty, compassion, spiritual, integrated, understanding, and openness. The qualitative analysis was based on intensity, density, and frequency. Quotations were taken from the interviews to illustrate themes. Due to length constraints and the amount of reported data in this dissertation, multiple examples within each theme are ordered from greatest intensity and clarity to least. Some details have been edited to protect co-participant confidentiality, and the following elaborates on these findings.

*Honesty.* Three of 15 nominators (20%) reported honesty as descriptive of their exemplar.

They shared these words:

He is brutally honest about himself and about life. (N 9)

Regardless of a commonly held opinion, she speaks the truth as she sees it, whether in social circles or in matters of faith. (N 13)

He acknowledges his own human-ness and will talk about the places where he works with challenges in his life, so he is a very genuine person. (N 5)

*Compassion.* Five of 15 nominators (33%) reported compassion as descriptive of the exemplars. Below are four examples:

More than anything else he touches people with his compassion. (N 12)

His gracious and loving heart, and his profound compassion for the world at large are essential components of his wisdom. (N 10)

He combines a great clarity of mind and wisdom with a non-judgmental compassionate mind. He has always been loving, compassionate, clear and present for people. (N 5)

He embodies high levels of empathy and compassion. (N 14)

*Spiritual.* Seven (47%) of 15 nominators reported spiritually related descriptions of the exemplars. Some examples include:

She is a genuine spiritual seeker who not only speaks of spirituality but tries to live from her spiritual center on an ongoing basis. She is also mature psychologically and has attained sufficient spiritual realization to act from a truly transpersonal rather than only personal perspective. That is rare, even with all the current interest in “spirituality.” (N 8)

I have no doubt that God is increasingly at the center of her life . . . She has a deep and natural instinct for the spiritual in the midst of daily life. (N 13)

He sees the spiritual as a natural part of things. (N 7)

One aspect of his wisdom that he imparted to me many years ago is his belief that each person’s deepest and truest vocation is to fully be the person whom God has created them to be. (N 4)

*Integration.* Four of 15 nominators (27%) reported integration as an exemplar descriptor.

Three described it this way:

He is capable of making incredible connections between inner and outer life. His ability to integrate what he hears, reads, experiences and make sense of it is amazing to me. Nothing in people, in what they say or are doing, is disconnected to him. (N 1)

I experience him as being very much in the present and integrated. (N 2)

He’s achieved an integration and balance of social, personal, professional life that’s quite rare. (N 14)

*Brings understanding.* Five of 15 nominators (33%) reported bringing understanding as descriptive of the exemplar. Below are three examples:

He is insightful, is very connected to his unconscious and that of others, and this enables him to understand at a very deep level. (N 1)

She is understanding when you talk to her about difficult situations. (N 16)

He is wise in the mature, sensitive way he understands life and meets its many challenges. (N 9)

*Openness.* Six of 15 (40%) of nominators reported openness-related descriptions of the exemplar. It was written this way by 4 participants:

He is very open and receptive. (N 1)

She exemplifies openness. (N 8)

Another source of my mother's wisdom is her openness to the new. She reads good literature and remains informed about current affairs. She ponders new ideas and is desirous of understanding the generation today. She has a deep passion for growth. She has given herself to the process of refining what is important and letting go of goals and values that no longer have a hold on her. (N 13)

An even, open nature. (N 7)

*Exemplar Wisdom Related Qualities: The Foundational Value Scale (FVS)*

For the purpose of supplying nominators with indices to rate exemplars' characteristics, the Foundational Value Scale (FVS) was employed (Orwoll & Perlmutter, 1990). The FVS was developed by Jason et al. (2001) to measure the construct and dimensions of wisdom. It includes five factors and 23 items thought to be descriptive of wisdom-related qualities.

The overall average scale score for exemplars was a 4.53 out of a possible 5, ( $SD = .26$ ), meaning that the qualities rated in the scale, on average, and according to the anchors, were seen as "definitely" descriptors of exemplars as chosen by the nominators. This does not mean that the qualities represented in the scale are necessarily the most reflective of what wisdom actually is, but rather that nominators found a high degree of resonance overall between their assessment of exemplar qualities and this scale. The quality on the scale most highly chosen as descriptive of exemplars was Intelligence ( $M = 4.95$ ,  $SD = .213$ ) and the lowest Genius ( $M = 3.65$ ,  $SD = .875$ ) with a resulting range of 1.35. The highest scoring factor was Harmony ( $M = 4.69$ ,  $SD = .304$ ) and the lowest was Nature ( $M = 4.24$ ,  $SD = .476$ ).

Results of the five factors and the highest and lowest scoring single items are summarized in Table 12.

Table 12

*Foundational Value Scale Results: Five Factors and Highest and Lowest Item Scores*

5 Factors	Mean	SD	Highest Items	Mean	SD	Lowest Items	Mean	SD
Harmony	4.6	.30	Intelligence	4.9	.21	Genius	3.6	.87
Spirituality	4.6	.48	Meaning/Purpose	4.9	.29	Animation	3.6	.81
Intelligence	4.4	.41	Good Judgment	4.8	.50	Environment	4.1	.72
Warmth	4.4	.41	Spiritual Life	4.8	.51	Flow	4.1	.74
Nature	4.2	.47	Openness	4.7	.52	Rev Nature	4.3	.58

*Note.* Mean scores out of possible 5.0.

*Exemplar Wisdom-Related Qualities: Semi-Structured Interviews*

Exemplars demonstrated four robust personal qualities: (a) telling the truth, (b) being able to tolerate uncertainty, (c) having gratefulness and appreciation, and (d) being funny and lighthearted. The researcher's goal was to use quotations that allow the reader to feel the qualities put forth in the interviews.

*Truth telling.* Ten of 20 (50%) exemplars explicitly expressed valuing telling the truth, both to others and to themselves. Below are three examples:

Well, I would say that I've always been on a path of truthfulness or truth. I don't lie. I mean actually never lie. And I made that decision when I was 11 . . . I just said to myself I don't ever want to lie again because it makes me too confused. It makes me forget who I am. And I'm never going to do that again . . . And I think what that does in my experience of it, is that your mind, the mind, my mind or anybody's mind, gets clearer and clearer when you don't lie. It's sort of like karmic, positive karma. Is that when you don't lie, you don't confuse yourself, and then the less and less confused you are, the clearer [laughter] and clearer you get. So I experience myself as getting more intelligent with age. To say something or to say it even just to myself truthfully, which is often the

case, I mean, it's often the case that saying it to someone else is not useful. But to be so honest with myself about something that it cuts through all the bullshit. (EX 20)

Honesty—being in truth matters to me. Being direct matters to me, even when it's hard, especially when it's hard. I value—I don't know how to put this—you know, if guidance shows up or direction shows up to do something, even—especially if it's hard. So there's the real level of truth-telling and confrontation when, you know, somebody's willing to say, “You're out of your fucking mind. Are you crazy?” (laughter). (EX 6)

I think most of us go through our lives with a few sayings that are important, and one of my important sayings is from Mark Twain, and he said, “I always tell the truth, and that way I don't have to remember what I said.” So the older I get, the more I believe that I just say . . . what's true for me at the moment. That's kind of all I need. (EX 13)

*Uncertainty and not knowing.* Nine of 20 (45%) of exemplars (explicitly) expressed uncertainty and not knowing as central components of their life. Flashes of realizing it was OK to not know, seeing life as an unfolding mystery, and valuing not knowing as an anecdote to nervousness and complacency are some of the sentiments of the 5 exemplars below:

I don't know if I'm even certain about anything. (EX 1)

There was kind of a moment, flash, of realizing that it was OK not to know and that I'd know when I know. I didn't have to know. And just that really had a big change in my life because I think we're often fearful of the apparent insecurity of not knowing. I have just found it's much more easeful to be OK with not knowing, and then one way or another a decision will be made, either because we'll know or because the time will run out and the option for doing one of them is no longer there. Something will happen, and we don't have to drive ourselves crazy figuring it out before we actually do know. The ease in not knowing is analogous to the pause. It's just waiting and seeing. (EX 15)

It is an ever-unfolding mystery. You know, I live a lot not knowing anything. Most everything I really thought I knew, I found out I didn't know. It's not what I thought it was. I'm not what I thought I was. And children—nothing is what I thought it was. What does “know” mean anyway? I can directly experience what's here in this moment, but to give it a name and call it something isn't it. So I can't say I know I'm feeling happy. I'm having an experience, but the minute I name it as, “I know it. I'm feeling happy,” or this or that, it's not the truth any—that's not it. So it's more what I don't know that's more interesting to me. (EX 6)

I don't know anything for certain [pauses] . . . Now that sounds like a self-contradiction but that's only a self-contradiction if you think language is the only self-referential. If you think language points out, then it makes sense. Seeking is a process and living is also a process but the things that are for certain, like analytic systems like mathematics, are certain but they have nothing to do with the world. (EX 2)



The other thing I know that's true for me, anyway, is that if I knew much farther than one step ahead, I might get too nervous or too complacent. And so I think part of the essence of faith for me is knowing that I really only have to know the next piece. And even if I don't know that, I'll still be OK. And so that's been something I've settled into much more over the last few years. (EX 13)

*Gratitude, appreciation, grace, blessings.* Fourteen of 20 (70%) exemplars expressed deep appreciation for life, love, their own journey, health, and nature. Words from 6 exemplars are below:

I'm one of the most blessed men. My life is a miracle . . . that's all I can say. I focus on that devotionally every day. The life that's in my heart and within my lungs and the capacity to love and to experience being loved—I mean, all of that. Oh, my God. I thank God dozens of times a day. That's the way I see my life. (EX 7)

I enter the day with a sense of gratefulness and thankfulness, a bow of gratitude for this day. It's such an elemental thing that we have to come to terms with. We did not generate our life. That life was given to us. And, we forget that our place in life is simply honoring the gift that's been given to us and having a strong sense of stewardship of all the life and living that's around us, whether it's nature, another person, an institution, or whatever it is. It goes back to something I said earlier, that we honestly don't possess anything . . . We're just given a lot of stuff to take care of. (EX 11)

I feel a huge amount of gratefulness for my own journey, and when you're coming from gratefulness, you tap into the field. It's a very powerful place. So I'm always thanking people all the time. Why wouldn't I be thanking them? (EX 8)

I love my life. I absolutely love my life. I miss my husband, needless to say. I miss him terribly, but I love my children and my grandchildren and I have a lot of activities. I have a very full life and I'm very grateful. Each day I wake up I'm very grateful to be, to the good Lord for another day and the fact that I'm upright. Let me do the best I can with it. That's who I am. (EX 18)

I'm almost overwhelmed with gratitude for the privilege of good health, you know. I feel so indebted to grace, to the grace of God that manifests itself in so many ways, and I'm sure there'll be opportunity for me to share some more of these moments with you. I'm so grateful that I want to share my life, my time, my money, whatever the case might be. (EX 3)

(I think right) at this moment I'm experiencing gratitude. I'm enjoying having a little time to breathe, and enjoying being here in this day. I was out to see the trees before you came. (EX 13)

*Humor and lightness.* Thirteen of 20 (65%) exemplars expressed humor and lightness, both in the moment with me and as reflective of their lives and interactions with others. They tended to laugh at themselves, make light of being considered wise, see laughing as reflective of being comfortable, and use it in moments of deep pain.

Below are the words of 6 exemplars:

My family came from all over, and friends came to say goodbye to me. And I asked for ice cream every time I was really conscious, and my wife could not refuse the request of a dying man. Phew. And I, I, I played that as long as I could . . . [laughter] And that is my style a lot to approach life with, with a lot of humor. My coworkers were always kind of amazed that so much laughter came from my counseling room . . . and my wife and I, when we met we started laughing and we haven't quit. (EX 7)

(Answers the door for the interview in a purple wizard's hat). I'm amused that you were amused by my robe and staff and my wizard's hat. That's a pleasure. I like to be able to see what the future is. The crystal ball is always at hand. I should have been carrying a crystal ball. Oh, why didn't I think of that? Drew: You should have been floating. Well, yes. I'll try that next time [laughter]. (EX 14)

I was simultaneously a management and a labor negotiator. I negotiated for the management of the city and for the teachers as a labor negotiator, for 6 years I did that on alternate nights, almost. Which is a very—people sometimes ask me how I did it and I say, “Because I have no character” [loud laughter]. (EX 2)

Oh, God. [laughter] Really? The thing that they always ask every priest. I hate this question. “What is your spiritual discipline?” And usually I make up something. [laughter] I mean, people say, “Well, I do morning prayer every day and I do” [laughter]. Oh, I go work on my sports car [laughter]. Then I go drink a glass of wine. No, I tell you. I don't think it makes any difference. (EX 5)

Humor is a part of it. In fact a humorless wise person would be awful [laughter]. (EX 3)

You know, I always felt more or less self-confident. A lot of it I came to understand had a defensive quality to it. But I think people all my life, from very young, would describe me as fairly self-confident. Some would say cocky . . . maybe arrogant [laughs] . . . We won't count them. (EX 12)

### *Exemplar Wisdom-Related Qualities: Section Summary*

The quantitative findings are confirmatory and addressed multiple hypotheses related to assessing exemplar's wisdom-related qualities and characteristics:

1. As predicted, the average exemplar score on the Self-Assessed Wisdom Scale exceeded the cutoff considered to be wise
2. As predicted, exemplars' average scores exceeded the norm on the importance of spirituality (SPS), generativity (LGS), mindfulness (MAAS), satisfaction with life (SWLS), and openness to experience (BFI) by at least 10%.
3. As predicted, exemplars average scores were lower than the norm on perceived stress (PSS-10) and state anxiety (STAI) by at least 10%.
4. Inconsistent with the prediction, exemplars' average scores on the Narcissistic Personality Inventory (NPI-16) and STAI Trait-Anxiety (STAI) did not fall below the mean normative scores of each measure by at least 10%.
5. As predicted, exemplars' average score on the Washington University Sentence Completion Test (WUSCT) exceeded the highest conventional stage of adult development, the Achiever, 4.0.
6. As predicted, there were found to be statistically significant positive correlations between the Self-Assessed Wisdom Scale (SAWS) and: BFI Openness to Experience, Spiritual Perspective Scale (SPS), and Humility Inventory (HI), consistent with the prediction.
7. Inconsistent with prediction, there were found to be positive, but not significant correlations between the Self-Assessed Wisdom Scale (SAWS) and: Mindful Attention Awareness Scale (MAAS) and Loyola Generativity Scale (LGS).

One qualitative finding of the study was exploratory and addressed the research area:

*What are exemplars' wisdom-related qualities?*

Nominators reported on six core qualities of exemplars: honesty, compassion, spiritual, integrated, understanding, and openness.

1. Nominators ranked intelligence, harmony, and spirituality highest on the Foundational Value Scale; genius and animation lowest.
2. Four core qualities came from the exemplar semi-structured interviews: (a) telling the truth, (b) being able to tolerate uncertainty, (c) having gratefulness and appreciation, and (d) being funny and lighthearted.

### *Section 7: Exemplars' Lives*

A second qualitative finding of the study was exploratory and addressed the research area: *What are exemplars' lives like?* The exploration of exemplars' lives was grounded in nominator narratives and exemplar interviews. Nominators chiefly characterized exemplars as deeply engaged in life and relationships. The most significant findings in the interviews were exemplars' intimate relationships with mentors, loved ones, and themselves; valuing spirituality; and being impactful guides in the world.

In reporting, the researcher will give an overview and introduction of the theme and subthemes, followed by multiple direct quotations and supporting evidence. Due to length constraints and the amount of reported data in this dissertation, the most salient exemplar quotes within each theme are ordered from greatest intensity and clarity to least. Some details have been edited to protect co-participant confidentiality. A summary will follow this section.

#### *Exemplars' Lives: Nominator Narratives*

##### *Engaged in Life and Relationships*

Nominators described exemplars as deeply engaged in life and meaningful relationships. This finding was evidenced by exemplars' personal impact on the nominators, endurance of

painful life experiences, valuation of helping others, being sought out for counsel, validation of peers, and observance of their own experiences. Subthemes are elaborated on below.

### *Significant Personal Impact and Inspiration*

Five of 15 nominators (33%) reported being personally impacted and inspired by their exemplar. The following written excerpts are four examples:

I feel valued and respected and indeed loved by him. I have been inspired by him to live my life more fully and with more aliveness. He helped me to see myself through his loving, accepting eyes. This human to human relationship has been both healing and growth inspiring. I see him as a mentor and guide because he believes in me. He sees the best in me. When I feel seen and accepted like that I feel unhooked from the small self and better prepared to transcend my limited view and experience of how things are, how I am. He has certainly touched my life in a profound way. (N 12)

Many times, when dealing directly with very challenging, very difficult or painful experiences, he clearly saw me, saw what was going on and knew precisely what I needed to hear and what I needed to do in the situation. (N 5)

He is and continues to be the model for the kind of person I want to be. (N 10)

He is an inspiration to me and many other people. (N 3)

### *Endurance of Painful Life Experiences and Resilience*

Four of 15 nominators (27%) reported painful life experiences and resilience as reflective of their exemplars' lives. Three described it this way:

Several years ago, he was struck by a severe and debilitating illness that left him bedridden, completely paralyzed, and unable to speak for an entire year. His mind remained clear and alert, but he was unable to move or to speak. Eventually, additional health complications took him to the door of death and he was given only a couple of days to live. Not only was his life force not extinguished at that time, but he survived, has made a near complete recovery, and is able to be fully active with only minimal symptoms. This journey through the agony of illness and coming face to face with death has taken his spiritual wisdom to even greater contemplative depths. (N 4)

He demonstrated extraordinary servitude in the decades-long care of his late wife, who had severe, crippling arthritis for as long as I can recall. He tended to her in a consistently loving manner. Likewise, he also was caregiver to their late son, who was born with a hydrocephalic condition. His son lived into his college years with the cheering of his father (and mother) for his continued progress. He demonstrated a great deal of emotional maturity and integrity at a critical juncture in his ministry. As campus pastor during the

Vietnam War, he provided support and a forum for students protesting the war. As a result, some powerful members of the congregation complained to the then-bishop who ordered him to relocate. His predicament in moving was that both his wife and his son required extensive medical care and had well-established relationships with the local medical community. It would have been potentially life threatening to move. So, he withdrew from campus ministry and became dean of students at the then brand new community college. This is where he finished his professional career. Despite this, he did not become bitter. (N 10)

While she may find a situation painful, unbelievably demanding, or even frightening, she summons up the courage and fidelity to stay with it. She has weathered a number of crises in her life with balance, honesty, emotional intelligence, and tremendous courage and steadfastness. (N 13)

### *Values Giving of Themselves to Others*

Five of 15 nominators (33%) reported sharing life experiences and supporting others as descriptive of their exemplar. Below are three illustrations:

She generously shares her knowledge and experience of life and the world . . . especially how to be an empowered, present woman in a patriarchy. She mentors and guides people without being paid. (N 3)

She has a natural ability to work with people and she uses it generously and with great joy. (N 13)

He has helped countless people through sharing his own wisdom- attained through his own inner and outer journey and research and by helping people access their own truths and “sing their song.” He shares time-tested truths of wisdom from the ages and helps people connect this truth to their own lives. (N 3)

### *Sought Out for Counsel*

Five of 15 nominators (33%) reported being sought out for counsel as descriptions of the exemplars. Some examples include:

He is a good friend and sought out by many for wise counsel. (N 12)

Extremely wise people have sought her out and gone to therapy with her. (N 15)

### *Peer Validation and Significant Impact on Chosen Field*

Four of 15 nominators (27%) reported peer validation and significant impact on chosen field as an exemplar descriptor. Below are two examples:

He is referred to as the shaman's shaman by people who are respected healers and visionaries. (N 3)

She has been a pioneer and has influenced the entire field of mental health with her work. She has been president of multiple professional organizations and has also been very much in the world. (N 15)

### *Observant of Their Own Experience*

Four of 15 nominators (27%) reported exemplars' observance of their own experience as a descriptor. It was explained in the following way:

He is able to own negative feelings and yet is able to transcend them and shift into a positive, hopeful perspective without resorting to denial. (N 10)

He is a keen observer of his own experience and his experience with others. (N 2)

I have always marveled at her self-possession and self-knowledge. She knows who she is. (N 13)

I experience him as being very much in the present, mindful. (EC)

### *Exemplars' Lives: Major Themes From Interviews With the Exemplar Group*

Three overarching themes captured the core of the exemplars' lives. First, exemplars are intimately connected to loved ones and mentors, and are observant of their own moment-to-moment experiences. Second, spirituality is important, and is reflected in their understanding of the unity of spirituality and life, meditation practices, retreat attendance, and reflective articulation process. Third, exemplars have an impact on others' lives as luminaries, transformational agents, and teachers. These findings are explained below.

### *Exemplars' Lives: Intimate Relationships and Connections*

In the semi-structured interviews, exemplars reported deeply meaningful encounters and relationships with mentors, themselves, and loved ones.

*A Deeply Meaningful Relationship With a Mentor Figure That Offered Healing*

Thirteen of 20 (65%) exemplars expressed a deeply meaningful relationship with a mentor figure. Therapists, spiritual teachers, and grandmothers are among the formative figures mentioned in the five examples below:

There was a woman that I had as a therapist, and I was really desperate. And, I remember one time looking at her in the therapy and said to her, would it make any difference to you if I didn't make it? You know, if I took my own life? And, she didn't say a word. She didn't say a word. She just looked at me. And I could see the pain in her eyes that I would have to ask that kind of question. And the pain that she felt my pain that I was in such a place that I wouldn't know. And, it was very, very wise—she was young, you know. I was 50 and she was like 35. And, but she was there with her heart. And one time in desperation, she just reached over and held me. I went over on the floor and, and, and just, just her presence. And, and I could feel, I could feel her heart, that she actually really cared. (EX 17)

I sat with him many years ago . . . a pretty fierce Zen master. And you had to go in four times a day to see him, very formal. And he teaches like the Zen koan method . . . you have to go in and give some response. And everything's very highly pressured—It's a very highly disciplined format. So I would go in and give the answer to my koan. And mostly his responses to me were, "Very stupid." Or in a good interview he might say, "OK, but not Zen." So basically he had disparaging remarks about everything that I was saying and I was getting more and more uptight. So finally one time I went in and I think he took some pity on me and gave me an easier koan. He said, "How do you manifest the Buddha while chanting the sutra?" We had been doing chanting through the sesshin, so the response was obvious to me, but it also triggered this very deep conditioning in me where, going back to my third grade singing teacher who said, "I just mouthed the words" [laughter]. So there was this huge inhibition about singing, chanting, so this is a very public thing. Anyway, I go back in, say the koan, and I just messed the whole thing up. I was a complete mess. I got the words all wrong, got the melody all wrong, everything, and I felt awful. I just felt like completely exposed and raw. And in that moment, he just looked at me, and he said, "Oh. Very good." And it was such an incredible moment. So in that moment, he was manifesting just kind of the utmost compassion and kindness and love. And because I was so vulnerable, kind of, that really just went totally right to my heart. So, you know, before that he had been this amazingly fierce, disparaging, you know [laughter], you jerk or what are all these stupid answers. But then when he saw that I was open in that very vulnerable way, he changed; it was a completely different response. And I think this is the gift of wisdom, you know, that he really knows, knows what's appropriate in a moment. (EX 15)

One of the greatest gifts I got out of therapy, with a wonderful guy, Jim Bugenthal, totally changed my life. Absolutely the most transforming experience of my life. I went into therapy with him and came out of there totally turned around. One of the greatest gifts I got was learning that a mind was trustworthy; that given the appropriate awareness



attention, the mind is this self-healing, self-actualizing, self-transcending, self-awakening instrument. (EX 16)

As I look back on my life, I realize that my grandmother was probably the person who taught me about reflection and prayer. Not because she taught me to pray. But because she took me into her garden, and she explained life to me in terms of the cycle of the garden. And so I realized looking back on it, that my truly dedicated Christian grandmother was the person who taught me to be a Pagan. And how grateful I am that she taught me about cycles happening on their own accord. (EX 13)

I learned a lot from one of my teachers, Milton Erickson, and what I experienced was him trusting in what he called the unconscious, what we might call the true self, the greater self, or transpersonal self for me—but he saw the unconscious as having resources that the conscious mind did not have. And so, the way he would put it to me was that he created the circumstance in which the person could improve their thinking, feeling, and acting for the better. And he probably told somebody else something entirely different—Erickson. (EX 14)

### *Self-Contact and Self-Awareness*

Twelve of 20 (60%) exemplars said they valued abiding self awareness. Exemplars reported tracking sensations, creating spaciousness around emotions, witnessing thoughts, and staying in touch with moment-to-moment arisings. Seven exemplars described self-contact and awareness this way:

The other thing that's meaningful for me is just trying to stay in contact with what's happening to me. What am I experiencing? Kind of trying to refer back to that and check in with it. Then also just allowing myself time to process whatever's going on [pauses], and to try to give it some spaciousness [pauses], and see what's really going on, because often when trivial things catch me, it's usually more than the trivial thing itself. It's usually connected to some deeper stuff for me, or aspects of the situation I really haven't wanted to look at. (EX 12)

Well, I'm experiencing everything from the pressure of one leg on another, to a background feeling of pleasure, to pure awareness witnessing the same, witnessing it. And everything in between. It's interesting. I'm just watching the mental process of responding to this. It's like there's a boundless array of perspectives and possibilities. So it's a process of either selecting for any number of reasons one particular perspective or sitting back and allowing some aphoristic response, almost poetic response to attempt to encapsulate the many dimensions so. What's my life like? Beyond description. (EX 16)

Well, I think it's the gradual strengthening of the faculty of awareness, you know, and self-awareness so that just over the years I've become kind of increasingly mindful of just the different patterns that are going on in my mind in thoughts and emotions. And

through the seeing of them more clearly, it becomes easier to, at least a good part of the time, certainly not all the time, but a good part of the time, choosing to act on those that bring about well being and letting those go that seem to bring about suffering. So it all comes out of awareness and self-awareness.

Really what's most meaningful is awakenings and seeing all the places in the mind or forces in the mind that hinder that. I mean, that's really the—that is the basic kind of thread of my life. That could be the line running through my life, and could see things as either fostering a greater and greater “awakeness” or those things which tend to hinder it. (EX 15)

And so learning to trust that it's all right. The main thing I have to do is be there. And simply in the fact of being there we can engage and encounter. But then beginning to trust what begins to happen simply by being and reflective. We've got thoughts and structure and all that kind of stuff. But underneath it has more to do with how I engage. And so it's—that experience and being able to do that moves it beyond self-confidence. And it's not a matter of having confidence in myself. It's more of a matter of being accessible to myself in that situation. And that's enough. (EX 11)

Years ago, I learned to be present for clients, but it's really only lately that I'm learning more to be present for myself. I used to be able to do it in fits and starts, but now I'm starting to think of it as something you might be able to do. (EX 13)

### *Love, Intimacy, and Connection*

Thirteen of 20 (65%) exemplars spoke about expressing love, intimacy, and connection with others. In particular, exemplars loved and appreciated their partners, long-time friends, and meaningful peer groups. Five exemplars spoke about it this way:

Most of the relationships in these last few years, the predominant experience is this deep, deep, heart/soul connection where love is expressed freely. There's a good deal of authenticity, people not being afraid, me not being afraid to say what I really think or feel, to allow myself and other people to show up as they want, not as I need them to show up or I'm expected to show up. The quality about them is they can change, can morph. I've got people that we've danced in different ways and somewhat easily, in many cases, have been able to let go of a certain way and come into another but still knowing there's this thread of fated connection for that time which brings a sacredness and a very deep value to these relationships. And truly, it just fills me with a level of love that I can't even (crying), I have to breathe to fully let in. And just a lot of gratitude and just sheer amazement at the beings that are in my life, just to know them. (EX 4)

Just taking moments, like every day of just holding my wife, looking in her eyes, and breathing, and ahhh, taking in—she's this marvelous, marvelous gift. You know, you can do all the work in the world, Drew; that doesn't mean you're going to find a love or someone to love you. (EX 17)

My husband and I have been married for 37 years, so we've known each other for 42 years. It's utterly incredible to know somebody that long. And to be able to love them. I find that incredibly meaningful. I also have a women's group that I've been part of for 25 years. We meet every other Friday morning, and they're extremely meaningful to me because there's six of us, and five of them I would not know in any other way. One was a very close friend, and still is. But because I grew up as an only child, getting to know these women deeply . . . has been a huge coming to the place of understanding that to be a woman means we all go through the same things, just in very different ways. And so their stories have so enriched me. As I'm the youngest one in the group, I always hear all these stories before I get to them [laughs]. So that's really helpful for me. (EX 13)

I have a partner in my life now, and that's been quite amazing and beautiful and loving and—so I guess my life is pretty blessed. I have this incredible community . . . that are students, and amazing friends—deep interaction—some people I've been on the journey with for like almost 30 years—that's very enlivening. I'm in touch with a lot of amazing beings who are very deeply committed to consciousness, to being awake day to day. I've been gifted with amazing people in my life, and so much love. (EX 6)

I have a close inner circle of friends, people I know that I love that I'm going to know all my life. I have two friends that I've known since grammar school that I'm still very much in contact with. Love dearly. I know they'll go to my funeral—or I'll go to their funeral. (EX 12)

### *Exemplars' Lives: Valuing the Spiritual*

In addition to intimate relationships with mentors, themselves, and loved ones, exemplars valued spirituality in their lives. This finding was evidenced by exemplars' view that spirituality and life are not separate and that spiritual paths each contain partial truth. They also attended retreats, valued meditation, and have a reflective articulation process that informs them. Examples are given below that expand on this theme.

#### *Oneness, Being a Part of the Whole, and Being a Part of Larger Creation*

Thirteen of 20 (65%) exemplars expressed a connection to oneness, being a part of the whole, of larger creation. For most exemplars, being part of the whole seemed to manifest as an abiding knowing that often began with a moment of recognition. Seven exemplars spoke about the following way:

I just went into another whole level of recognition of my true nature I guess you would say. And it was like consciousness simply letting go of everything I am. And merging with everything that is. And I don't know. It was like a recognition of truth that I couldn't possibly ever deny again. That it was just so completely absorbing. And I guess within that process I just felt like there's no way I could search anymore for anything. It just ended it. It ended the whole thing. And I have no more interest in spiritual practices, I mean, except sitting sometimes. But I'm not looking for anything. What it does is it ends the seeker when you recognize the truth. It just eliminates that. You realize you're not there. There's nobody really there. There's only a set of experiences. And that you are this—that what I am and what you are, there's absolutely no difference at the core. Every living thing is the same thing. It also eliminates any tendency to think that you're different than anyone else because everyone else is this too. It's just totally obvious. And so it just kind of ends the journey. And that's about all I can say about it. (EX 9)

Just before I left Thailand—I really had a really profoundly transformative experience as a friend of mine was reading from a Tibetan text. My mind happened to be very concentrated as he was reading. And, I mean, this gets more to in a, you might call it, a more mystical side or transcendental side. Anyway, he was reading the text and he was talking about the nature of the mind being, you know, unformed and without shape and without color, and then uses the phrase “the mind as being unborn.” My mind was in a very, very concentrated, still open space. And just in hearing that word, the unborn, it's like something happened. You know, it was a bit like a bolt of lightning. And so it had that intuitive opening to what could be called the unborn. And the result of that moment was kind of a very classic Buddhist insight into the selfless nature of phenomena. You know, the whole notion of self is an illusion. And so, just after that moment, I came out, and I was really in an altered, an altered state. And I remember saying to myself, “There's no me. There's no me.” And in the moment it wasn't that that was particularly blissful or, you know, it wasn't like going into some great blissful state. It was more like [laughter] the floor of self, the ground of self had fallen away. And it took me quite a while to kind of figure out both what had happened. But, I mean, this came totally out of the blue. It was very unexpected. What was striking about it was the understanding of the selfless nature of everything. The limitation of how we usually think of a sense of self as being the particular body we inhabit, you know, and being limited to that frame. That boundary fell away just afterwards. And it was just, there was more a, just a totality of experience rather than any one part of it being me. Yeah. But the intensity of that perspective didn't last. And so there was a process then kind of, you could say, coming back into the normal sense of the body, you know, as distinct from things outside the body. (EX 15)

It was maybe another year or so of coming out here, sitting with Gangaji, where at every single satsang I would just get so enraged because my mind was trying to get what it couldn't get. And finally it snapped, you know. So that was the end of looking, seeking, in some way . . . I mean, there isn't a spiritual and something else. It's all the same thing in a certain sense—sitting here, making chocolate mousse, or making love, or sitting with students, or making art. I'd say it's the all of everything. Nothing is left out. Even the horror. (EX 6)

We're all connected. I know that. I know that death is really nothing. I mean, it's nothing. That's the only thing that makes sense about this whole thing of life, you know, is that death just really—we're going to find out it means nothing . . . The idea is that we really are part of this universe . . . And so you come to understand that our connectedness, that we are all, and all we are . . . is energy. I mean, that's enough, but that's what we are. And we ought to take advantage of it and take care of each other. (EX 5)

Everything is all connected and so I'm just one of the many aspects of nature. It's an inner truth that vibrates. It's a vibration. I know I'm part of something bigger than me. (EX 8)

From my spiritual perspective, the whole world is a manifestation of the goddess, and it is the goddess, not just a manifestation. It is creation. (EX 13)

Oh, my other prayer is simply, you know, to provide, you know, the inner strength, and courage, and gratitude to receive whatever comes into my life today, whatever it is. That's about the only prayer I have. So I don't pay a lot of attention to God anymore. I just pay attention to what life brings. And if I have to articulate an image of God these days it's simply life. Yeah, simply life. And that life itself has its own way of being. And it is that way of being of our life that is the sacred ground. And we don't have to symbolize or image it in any other way to define it. Even under the tremendous transitional, difficult, suffering conditions and deprivations and possibilities that the current time brings to us, underneath that is this profound awareness that whatever comes from this is going to be all right. Life has its own agenda [laughs]. And regardless of our fantasy of how much we control life, I mean, life controls us, you see. Life itself has its own way of being. That's as close to God as I can get. That being itself. And that spirituality isn't something that we suddenly get baptized with from out there somewhere. We were born with it [speaks very low]. It's the definition of the human being. And, you know, temptation in a culture like this one is to separate spiritually out, spirituality from the rest of life and not see the integral dimensions. (EX 11)

### *Different Spiritual Paths Are Each a Facet of the Jewel*

Twelve of 20 (60%) exemplars expressed that Truth can come through multiple religious/spiritual traditions as facets of the same jewel, and that not one tradition alone has exclusive claim on the Truth. Exemplars also spoke about lessening dogmatic stances and etiologies, updating cosmology, and increasing the capacity taking multiple perspectives. Some examples are given below:

My spiritual perspective is somewhat like a landscape. I imagine I'm up on a hill looking out over land, and over here, there's some mesas and mountains, and here, there's a river running through, and there's a desert here, and there's some other geographical feature there and a town over here. So it's not any one particular spiritual trajectory. (EX 14)

I honor the church and all of this crap because it's a way I got here. And, you know, I love the church, but I think we're called to stand on their shoulders and not to walk in their footsteps. And I think we're supposed to do for the modern age what Paul did for the, for the gentiles and the Romans. We're supposed to interpret Jesus in the light of our cosmology, and we're not doing it. Can you pour new wine into old wineskins? Can you patch an old pair of jeans with new cloth? Well, I don't know. I don't know. That my beloved church is becoming more and more and more irrelevant to the modern age, and I don't see many signs that they're getting it. If anything, there's a kind of a retrenchment. And that don't just mean the Methodist Church though that, that one is, but all of them are, you know, are losing sight of Jesus. And, oh God, I get so upset about that if I think about it. (EX 7)

Different religions, different spiritual paths focus on a particular facet of the, of the jewel of crystal through which consciousness expresses itself in love, wisdom, compassion; and [God knew of] us. Authentic spiritual traditions; ones which are both an expression of and a means to awakening to that source, or at least to facets of it. And ideally they are as Joseph Campbell said, transparent to the transcendent. Religions institutions, there are two kinds of religions; one, which basically represent different developmental stages. Conventional religion is narrative centered, and salvation is believed to come from belief in the narrative. Transconventional religion is consistent psycho technology for using the states of mind and realization of qualities and capacities that the founders discovered. Spiritual qualities can be initially cultivated and then unveiled through effective spiritual practices. Doing so is among the most, is potentially among the most satisfying of all pursuits and the most valuable. So that's both an ethic and an aesthetic. What else? (EX 16)

So I would use a Ninian Smarts' idea. I would say, think of religious traditions as an eight-sided Chinese lantern and in the middle, there's a candle. You don't know where the light comes from but the light is filtered through those various colors of glass. All those colors of glass, all those pieces of glass are manmade. They distort the light. Now, there are a few that are more transparent than others. Like for example, I would say the Zen Buddhism and perhaps even Quakerism is less distorted than others. But all major religions are just like those glass in the lantern. What's the light? You don't know what it is. That's where you come to your mystery again. But you are perfectly free to assess any human construction of any kind once you know about it, once you learn about it. But you have to learn about all of the glass, not just the one. You see? (EX 2)

I don't think Jesus owns a corner of the spiritual market. I like Jesus because to me it's just the best, it's just the best way. It makes more sense to me. It's the only, you know, Jesus is the only personal God of all the gods and really cares about people. I mean, that's his whole thing. And that's what I like. But I really get informed. I like the Vedic scriptures. I love them. And I've got all that stuff, and Vedanta. I have a lady who is a Vedanta practitioner. She comes in to see me every week, and we just talk about philosophy and so forth. She has all these ancient scriptures, and I've got stuff around that I try—and I've got, if you come in our house, I've got Buddhist shit all over the place. Like this stuff [laughter]. I mean, whoop. Like see—I got that in Tibet [laughter]. Half this stuff—I just have stuff all over. (EX 5)

My spiritual perspectives are . . . they're grounded in Christianity. I was raised Episcopalian and then ever since I was an undergraduate, I was interested in comparative religions and that interest has just deepened and grown so that over the years I really studied and practiced a number of different religious traditions. I really have a—since probably one of my mentors was Huston Smith and his perspective on religions is one which I really have appreciated. It's that there's truth in all the different traditions. They take different forms and there are important differences between the different traditions, but at the esoteric level, the innermost secret level they all have certain values. For example, the golden rule is one of them, love is another one that is embedded in there in all the traditions. Again, it's different doorways, different doorways into a connection with the divine, with the great mystery, with the experience of all that—of who and what we are. So it's kind of a really—to appreciate every tradition has, gives us a map or a pathway if we're willing to go deep. And so I really feel as I [unintelligible] article on special intelligence that spirituality exists in the hearts and minds of men and women everywhere, both within religious traditions and outside of religious traditions and that spirituality is just a natural part of who we are. And I guess another thing is being non-dogmatic. I think being dogmatic about anything would—doesn't strike me as very wise. (EX 10)

You know, that there's no one path and that each person find his or her passion or reason for living and do it well. Do it fully. Live it out. Have a good time. And don't spend a lot of time on the rules. And the rules are OK. There's nothing wrong with most of the rules. [Unintelligible] religious and spiritual rules are fine. You know, they're all, you know, don't lie, don't embezzle people [laughter], don't commit adultery. All those things are fine. You know, don't kill people. I mean all of that is just fine. But it's not about the rules. It's about living freely and compassionately and really fully just finding yourself and living that, with all its mistakes and challenges. And really go for it. You only got once chance. It's right now. And don't be afraid to make mistakes. There are no real mistakes. They're all just experiences. I mean it sounds trite, but it's true. (EX 20)

### *Reflective Articulation Process*

Thirteen of 20 (65%) exemplars expressed having a reflective articulation process in which they have access to an intuition/awareness out of which come creative and spontaneous images, words, and concepts relevant to the context. The responses below were often prompted by the question, “What is your phenomenology of knowing?”, “How do you know that you know?” or “Where did you ‘go’ to answer this question?” Below are nine examples:

Out of the void. At this stage, using that concept loosely, just to assume that after 30 years of meditation and practice that if this mind has turned to a particular question, the mind will, will just create an often valuable response of some kind. So I would say it's a kind of feeling intuition, which manifests as a—it's feeling intuition and out of that come words and concepts. And when the awareness is sharp, it's really clear that it's not that

the illusion of a me doing that or creating that is, is something [alluding]. Basically there's awareness, and somehow out of that springs some creative response to the question. (EX 16)

The way I've come to understand about my own way of working is that my primary access to knowing is intuitive, not cognitive. And therefore cognition is a result of intuitive awareness. And that's why on the Meyers Briggs . . . intellect, thinking, was my weakest function. And that really surprised me. I was kind of insulted because I always thought I was a pretty good thinker [laughs]. But it began to make more and more sense as I got a hold of the rest of the picture, which is that my core characteristics are intuitive and feeling.] And that's my entrée into myself, my entrée into another person, entrée into the world around me, which then it makes sense, you know, that reflective process is the way I think. Which is a lot different from other people. Other people lead into the world through their head. And I really lead into the world through my gut. It took me a long time to really become aware of that, because I always kicked myself around because it was such an effort to think. And like I wasn't supposed to be that way. I really was supposed to be much more analytic. My point is that I think it leads into kind of the core way that I live with myself. (EX 11)

It's as though there's a pool or a palpable inside plasma, sort of like the inside of the sun, but without the agitation and the—with that texture, and just talking about the texture, not fire or anything. So there is that feeling just outside of my immediate consciousness, and I pause and something emerges out of that, comes out of that, like teaching. So, once I know what the topic is, I can talk about it. I don't have to think about what I'm saying. And your presence is very, very supportive of that kind of experience, that kind of sourcing. Sometimes if I'm stuck for words, I will say mentally, "I need a word for this. I need to know what's going on." You know, I will send out a message. But this is very different. This is an altered state [kind of sense]. Then it's an altered state when I'm doing hypnosis and when I'm teaching. (EX 14)

I guess it feels mostly to me like listening. Kind of listening to myself. Or listening for something to come up from the belly kind of. Kind of asking myself what's true. I don't know. And listening. And seeing what emerges. I think that things arise for me that way both as sometimes like an image, and sometimes in words. (EX 9)

It's extremely intuitive. And this is really how I work with students on retreat also, in the interviews. I've really come to trust the space of mind out of which things come. And this has happened over many years, and I really trust it a lot. So it's almost like the question drops into space, and then something comes. And so it seems a very unpremeditated—you know, it's just what comes out of the mix of my understanding and experience. So it's one of the reasons I very much enjoy, in teaching venues, I very much enjoy just open question/answer discussions where I don't know—it's like I'm not giving a prepared talk or anything. It's just, you know, there could be several hundred people, and people are just asking questions. And I love that because I don't know what's coming, and I love to see what my response is. It's like it's as interesting to me to see how I respond as what the question is because it has that feeling of just being very intuitive and spontaneous . . . There are times when it really comes immediately, and sometimes I do wait. I've



been known for my long pauses [laughter]. And I'm extremely comfortable with them. Because it's just a very interesting space for me. It's just like resting in the space and waiting to see what comes. Yeah. They're usually not too long, [laughter] but noticeable. There's often a noticeable pause and just let something sink into the space and then see what arises. Yeah. (EX 15)

It's not—what it is will be experienced as this almost body experience of myself and my spirit of a rightness. And I probably can't even describe fully what that experience is. But I know it when I have it. And a lot of times I have to wait for that to show. I can't speed it up. It has its own rhythm of this, of kind of being. I'm doing my homework, which is I'm noticing and discerning and opening and receiving. But then there will be this point of there. The other thing is that increasingly, I mean, to the point that it started to be almost kind of slightly scary for me because it's happening so much. The knowing will occur in the dream world. And I will wake up and then have this experience of knowing what the rightness or the not rightness is. The path will play in the dream, and I'll get to experience it there [laughter]. (EX 4)

I always go to my body first. I always start with body and—and feel my body. As I was answering the last question, I was trying . . . to check in with . . . where my body was and what I was doing with my hands and things like that. And just feel the body. That seems to me to be a good way to start. And then see what arises. See what feelings and thoughts I'm aware of after checking in with my body. And also to kind of try and take into account data, you know, how, you know, what's happening with the other person, or with the situation. But feel the body is my starting point. And then also try to stay open to no answer. Just—you know, I'm doing this process . . . but it'll work or it won't work, and trying to be with that. Of course, you know, when there's a lot of feelings involved it's much harder to do that. But at least remind myself, “OK. I may not know what's really happening.” Being—being OK with don't know. I mean, the real data is direct sense experience. And just feeling like that has its own value, and to take it as such. Then there's another secondary process . . . That is, you know, trying to make sense of that. And it's kind of inevitable, you know. This is the real source of my wisdom right there. (EX 12)

### *Attends Retreats*

Eleven of 20 (55%) exemplars said retreats were important in, and of benefit to, their lives. Exemplars reflected on the significant impact of what they discovered on retreat, exemplified below:

That big shift, that transformative shift really happened when I did the 30-Day Ignition Retreat, which was 11 years ago, but it's still as fresh as can be. I really move back into those states, although I've moved way beyond who I was at that point. But It really had to do with that awareness that came to me during that retreat; that all this “driven-ness” to make my life meaningful kind of got spoken to by an inner voice that emerged of saying, “Remember, J, that I gave you your meaning at your birth.” And that awareness was so

transformative that it just lifted that anxiety burden of driving myself to make myself meaningful to either myself or the people around me. And allowed me to relax a bit. And it recontextualized my life in terms of the “driven-ness” to be somebody, rather than simply internally affirm the being that I am. And I think that transition not only brought a lot of relief but, you know, reframed a sense of myself, but then also began to reframe how I experience things in the world, how I experienced other people. You know, so much of my work now is encouraging people simply to be who they are rather than striving so hard to be somebody else. (EX 11)

When I was in my late 30, I was in a retreat for 5 days just with myself in silence in a house over the ocean in Big Sur. I guess the story I would relate that could kind of help you or anyone kind of understand in words what happened, because it’s very difficult for me, is you hear people talking about some sort of moment or experience, mystical experience, where they feel reborn. Where you have this, it’s almost like a wiping out of who you were, and an emergence of someone that even to yourself, you’re like, “I didn’t used to be like this.” And it happens very fast, within moments of something very profound that you experience. I spent many hours of that retreat laying on a towel in the grass staring up at the sun—just like when I was a little kid—outside of this house in Big Sur. That was a common link with being as a child as I was, I was down in the grass connected to the Earth and looking up at the sun and experiencing that kind of energy of nature. So that experience, I literally, it was like somebody reset my soul. (EX 4)

I just spent a month in retreat; went back and did some practices for cultivating love and compassion. Was very weird. I had always assumed that the more one practiced, the more whatever practices you did came increasingly easy and went deeper and deeper. And this was not the case for the first time. This felt like it wasn’t as deep, wasn’t as [ecstatic], it felt like tension, [traction]. And what I realized was that at this stage, it feels inappropriate to be trying to make things happen with the mind, with disallowing the mind to be and dissolve, and just resting in awareness. (EX 16)

What I found is that it’s necessary for me to take periods of time, extended periods of time each year to be doing intensive meditation practice, to be on retreat. Because those are the times when I feel like I’m the most disciplined.

At other times, I’ll still be doing daily practice and teaching and doing a lot of different things, but also with a lot of time doing less helpful things [laughter]. (EX 15)

### *Meditation, Meditators, Meditative*

Twelve of 20 (60%) exemplars said meditation is an essential (significant) component of their lives. Recall, of the 12 exemplars that reported meditation as one of their spiritual practices, eight have practiced for 25 years or more. Below are excerpts from 7 exemplars:

I was going through a divorce and had been a meditator for 20 some years, and doing what I did at that time in practice. The divorce time was pretty painful and my mind was going crazy. But this one day, I’ll never forget it. I sat to do my usual meditation and I

was directed—my attention was directed to the heart, and to stay in the heart. And then I was doing that daily, it just started opening a door. And I was watching my own—all the emotions around the divorce stuff burning off. (EX 6)

Well, one's whole life leads to this place. But I would say the predominant influence (that has really shaped who I am) has been the meditation practice. And that includes both my own intensive practice and teaching. (EX 15)

I have a spiritual practice and I spend a fair bit of time, especially in the mornings, in meditation. It's just the way to focus and enjoy that time in the morning in a very special way. But, I have particular things that I do, but I'm looser and looser about it all the time, actually. (EX 20)

Well, certainly the practice of meditation has been very useful. I've been meditating since the [19]70s, so it's been 30, 40 years. (EX 10)

The way I begin to experience through meditative practice, the Buddhist practices is just that. You know, it's evolving a structured practice that increasingly gives you deeper access to lots of inner processes, inner spiritual processes. (EX 11)

My baseline is, you know, up to 30 plus years of meditation is by conventional standards, pretty calm. But I'm certainly can still get hooked by any number of things. (EX 16)

For me, meditation has been really critical, really important. (EX 9)

### *Exemplars' Lives: Impactful Presence (Guides)*

In addition to having intimate relationships and valuing spirituality, exemplars are guides that have an impactful presence on others and the world as luminaries, transformational catalysts, and teachers with technologies or techniques for sharing with others. Examples are given below that expand on the overarching theme of impactful presence.

#### *Luminaries*

Ten of 20 (50%) exemplars spoke about being out ahead of normative cultural thinking in service of the healing and well-being of others in their capacities as trustees, founders, advocates, and educators. The following are 8 examples:

In midlife it just hit me like a ton of bricks again, and I began to say to my congregation, "We have to begin including female images for God." It's in the Bible, and it's in my heart. And I started rewriting hymns and singing songs of Pierre Teilhard de Chardin, and God, we had a good time. Part of my reasoning in entering the ministry was, you know,

how can I make the best use of my life? And it made sense to me that letting people know about the love of God was the most important thing I could do with my life. But you know, in our denomination, after seven years the Bishop said move. And I said, “Well, it’s in my heart to start a new congregation.” And they said, “Well, it’s not in our plans for you.” (EX 7)

There are nine of us trustees, and it has a large endowment that supports research and education and service, particularly in the area of how do we cultivate love and forgiveness. How do people learn to be more loving and forgiving? What are compassionate communities? How do we support the development of compassionate communities both within religious traditions and outside of religious traditions? So that it’s not a particular religious orientation, but it really looks at what is the process of transformation. How do we facilitate it and who are the people that are doing cutting edge work in these areas? It’s also part of how do we connect the inner life of mind and spirit with the outer life of work in the world, not just for oneself, but from a wider number of people in the world and they do have a more of a global reach. (EX 10)

In the work with the feminine in women and starting my nonprofit, and the work we’re doing with that to help women find what I believe is our capacities in ways of being and expressions that many women and most women have. But because of our culture and because of the stories and because of fear and because of true abuse and violence, that we’re not able to fully express, to fully express ourselves as beings. Basically helping do whatever I’m called to do to help that voice come forward, those things that aren’t spoken to be spoken. (EX 4)

The Dalai Lama was in town several years ago, and some of us were invited to a interfaith workshop. I mean there were hundreds, there were the Roman Catholic bishop, the Dalai Lama, a Muslim imam, a Jewish rabbi, and a very progressive Methodist pastor, and the theme was, in their experience—is there any connection between meditation and social action, social justice? It was beautiful. (EX 3)

I do a whole bunch of activities related to meditation. I go into prison about once a week, and I have been for about 8 years now. I’m one of the founders of the Prison Meditation Project. And that I find really fulfilling. Tremendously worthwhile for my own development. And very rewarding for me in terms of my own practice. And—I’ll probably do that as long as I can drive down there and walk around with, you know, without being a danger to others. (EX 12)

In 1972, I was at “B” College of Medicine, and I helped do some of the basic research. They were trying to come up with this diagnosis called ADD . . . and back in the [19]60s and [19]70s, I worked with Cameron and Virginia Satir. I was in part of that group. And we were doing a thing called an uncommon therapy, you know, that we would—what you do is you set up—oh just, but, I mean, it’s risky. It’s really risky [laughter]. It almost always works though [laughter]. So it does take courage to say, “Well, OK, am I really—is that just me talking? Or is it?” And I deal with that in the book there is how do you know when it’s you and how do you know when it’s really an external spiritual force in ourselves . . . Honestly, we’re here to learn to love each other and to share and help each

other along. I guess that's, I guess that's it. When I was with Desmond Tutu one time, I said, "Desmond, you only have one sermon." I said, "I can't believe a guy as famous as you, why you couldn't come up with more than one sermon." And he says, "I know it, Jim . . . and my sermon is God loves you. That's all it is" [laughter]. Well, mine's worse. I've only got one sermon, and that is that we ought to help each other, help take care of each other. (EX 5)

So that was why I ended up studying this for my dissertation work. And because I kept talking to other people and finding out that those, a lot of people who had these awakenings were having a great difficult time with it. And I got curious about what was the difference? Why wasn't that so for me? And could I help people who were caught in a negative experience because of it? And so that kind of set the whole direction for my whole professional life for the next 20 years. Which was really a blessing that I was in a school where I could do that, because otherwise I don't think I could have focused on anything else. And it would have really split me. It would have divided me. But it just carried me. And that really impacted my life greatly. I started an organization and I wrote a book and did a lot of things related. That whole period though, it was as if that energy was carrying me. It wasn't like I was doing it. It was like something else was just moving me. It was an amazing time of my life. (EX 9)

### *Transformational Agent (Change Agent)*

Eleven of 20 (55%) of exemplars seem to influence the lives of others in transformative ways. Reflective questioning, seeing into others, facilitating deep self-acceptance, and healing relationships are all ways exemplars are impactful (influential). These examples elaborate:

You know, so much of my work now is encouraging people simply to be who they are rather than striving so hard to be somebody else. And that who they are is sufficient, period. Whether they're conflicted with psychological difficulties, or they're way out in left field spiritually, or they're so conflicted with their partner or their other people, but simply allowing them to really confirm kind of who they are. You know, you're part of creation. That element is already existing inside of you. So let's kind of bring that forward. And it's so hard for people to really affirm their own internal existence as it is, because until we're able to do that we can't move ahead into, into new territory. You know, and we spend all our time fighting that battle. But you can't go somewhere until you know where you begin. But you know what, the depth of me for this that really arouses almost uncontrollable emotion is seeing people or things coming to some kind of fruition, some kind of fulfillment. A good example of that is what I find both in my teaching therapy and supervision is that being part of the experience of another person who really begins to experience the depth of satisfaction of their own life and fulfillment of their "beingness." (EX 11)

I don't feel like I can know for someone else what they need to do to have an experience that they would call spiritual within themselves or in a relationship to something else, to existence. What's more true is that in my life as I have connected to what I experience in

what we call spiritual, that people have shown up in my life who are struggling and searching, who in very unplanned, unintentional conversation we exchange information that then helps them find this within themselves. And so my experience of myself somehow attracts other people in a very unconscious, unintentional way. I don't find these people and say, "Hey, let me tell you about how this happened because this can help you find your spirituality." That through relationship, simple friendship—some of it has been business colleagues, some of it has been through just friends connecting or intimate relationships—especially the women who have come into my life that they, I tell about myself and what I'm experiencing, and that somehow creates their own experience of spirituality for themselves. And I don't even know how that happens, but that's more true because I would never recommend it. It would have to show up to receive. And it's not even an intentional. That probably just sounds—I don't even know if that makes sense to myself, but anyway that's what it is. (EX 4)

I would say being what comes up in the moment as a, as a feeling is being helpful to people, especially in helping people to wake up. I do seem to be graced at this stage with capacity to be able to see into people and be of help to them. And somehow that, and see people's presuppositions and so forth. I just assume that with most people, if I sit down with a person in trouble, if they're willing to just open up that there'll be something useful that comes out of that. I notice that in the last three years or so, a number of people started describing me as wise. So for what that's worth, on the other side of things, our cultural baseline is pretty low. So to be called wise in this culture is not necessarily saying a great deal. (EX 16)

What I've done in my life's work as a psychotherapist has partly been asking the kinds of questions that lead people to more reflective consideration of what they're doing in their lives and how they can take responsibility so they move. Usually in the process that I see happening is that people move from feeling like a victim to feeling like an adversary when they're willing to take a stand and say, "No more," to whatever it is that they're feeling victimized by. They have to move through that before they get to a place of being a co-creator and recognize that they are co-creating their lives. It's not just about being against the things you don't like. I mean there's an awful lot of social activists that come from a place of anger and being against and it's a lot harder to be creative or to recognize that we have to work with, not just work against anything that we are—feel we don't like or that it's a mistake or whatever. But in a certain sense mistakes are for correction rather than condemnation and the challenge is how do we contribute, in some way, to the process of development and education and conscious evolution. And that everybody does it differently. There's no single way and my way happened to be that I was drawn into the study of psychology and how the mind works and appreciating how much unnecessary suffering there is in the world. And there is a lot of inevitable suffering because we all experience loss and we all experience the reality of impermanence and yet there's also a huge amount of unnecessary emotional suffering that can be alleviated and so that is partly what I feel is, our job is to learn and teach as best we can. (EX 10)

## *Teachers*

Ten of 20 (50%) exemplars spoke about being teachers, and there seemed to be an appreciation both of the position of teaching and the impact of positively influencing others.

The following are five examples:

You know, when I teach the death and dying course one of the things that I try to really affirm and help the students recognize is that you're not dead until you're dead. You know that piece, as long as there's any breath left you can embrace that. And to live out as fully as possible what life is still present inside of you. And, you know, so many people don't really comprehend it. (EX 11)

Part of the reason that I went there as an adjunct to teach a class, and I've taught at many places as an adjunct, was that I found these students who were not just there because they wanted to sort of do this thing, but they wanted to impact the world. And I was just charmed by that. That was one piece. The other piece was that I realized the school was running a specific program without teachers trained in the program they were running. And I thought, "No, we need to fix that." I deeply value Systems Theory and it's something I feel that I must keep teaching as long as I can. (EX 13)

I've always been a teacher. In high school, I would do things like do presentations. I wrote sort of a play or a dialogue on Lao Tzu on Daoism when I was a sophomore in high school. All my classmates read it, you know, as sort of a little play. And I remember my dad said, "I think you probably would be really good as a college professor. That's something that you would be very suited for," and I said, "Oh, probably so." So there was that, and my academic work—my undergraduate work and graduate work—was always with the idea of being a teacher. So, since I'm in a spiritual ambience, I can say that I think teaching is a spiritual practice because it serves to relieve suffering, remove obstacles, help people move in directions that empower them. So that's another thread (in my life)—being a teacher. (EX 14)

Well [laughter], I think that just having, continuing one's own practice and then—well, continuing my own practice—and then sharing it, you know, which I do through teaching and writing, I think is the best thing I can be doing. Because really, I've become clearer through further practice. The whole teaching is about coming to the end of suffering. You know, that's what the Buddhism enlightenment is about. And so to the degree that we have some even small understanding of that and can help other people in that, it's the basic service. I mean, basically people do harmful things in the world because they don't understand their minds. And so to be able to help people, you know, free their minds from forces which cause suffering, like greed and hatred and fear, I think that is, that is in the service of the greatest good. (EX 15)

I taught high school kids for years, you know, for 36 years in two different places and I very seldom ran into kids between 15 and 18 who were really fixed. I love teaching that age because there was an openness that you don't get, even in college. (EX 2)

*Technology (Strategies)*

Thirteen of 20 (65%) exemplars talked about particular methods they use to teach others. Giving one concept at a time, being willing to look at what there is to learn, understanding how we know what is true for ourselves, following something to the extreme, attending to underlying motivations, resting as awareness, and dispelling ignorance are some examples of technologies in the transcripts below:

What I try to do when I teach is to give a person one or two concepts at a time. And then to give them a way to apply it themselves. And then to ask them to evaluate it. Because I think people can't learn what they know . . . if they don't have something to work on. But it's what they know about what they worked on . . . that will stay with them. Not what I know about it. And so wisdom is what you know about what you've done. (EX 13)

Life doesn't necessarily live up to our expectations or whatever we planned isn't usually how it turns out, so whatever turning points show up in people's lives can be transformative if we're willing to look at what there is to learn about any experience that we have to go through in this life. And particularly I think a close encounter with death, either one's own death or the death of a loved one or a loss, sometimes a divorce or something like that, things that happen in life that precipitate a radical re-evaluation of our assumptions and our beliefs. Those are the stepping stones to transformation. (EX 10)

How do you know when something is true for you? And people always show you [laughter]. They do. Like, you looked down and to the right. So that tells me that, to you, it's a feeling. And it is for many people. But people need to know how they know, and that's the thing that I try to get people working on when I first meet. How do you know when something is right or true or good? It's probably the best thing you can know about yourself. (EX 5)

I've heard this is in tantra, and so it's a good metaphor, is that you follow something to the extreme. And when you do so, you develop everything else along with it. And so truthfulness has led me to compassion, which leads me to the experience of the pervasiveness of suffering in human experience, which leads me to one thing after another. (EX 20)

To really pay attention to the motivation behind speech, just that would be a huge opening to the patterns of our minds. There are so many applications that we could pay attention to . . . the frequency of the judging mind. Watching afflictive emotions as they arise and then to really investigate: How am I getting caught here? Another thing I like to do, especially in more complex decisions, is hear various points of view. Because very often I'll just be seeing things one way, and it's very helpful to speak to people who see things another way and then to kind of sort it out. So that seems really helpful as well. (EX 15)



I'm just increasingly liking the do-nothing practice where you just sit as awareness—be awareness, even if it's for 10 seconds. There's something that opens in that practice—and I don't even know that it's a practice, but just having attention nowhere. Offers the capacity to engage direct experience. (EX 6)

I used the dispelling of ignorance is gaining knowledge and that's where my life as a teacher was. I would try to raise the consciousness of my students. With freshman boys, it was constructing a situation whereby they would have to figure out how to use a prepositional phrase in a sentence. And one time—I never taught it. I said, you must learn how to use an adverbial prepositional phrase at least four times in your essay and I would give certain definitions. As I watched a group of four kids in the back of my room—I have computers in the room—they were discussing the prepositional phrase on their own. These are, you know, 14- to 15- year-old boys. I looked at them and I said, "I could never get a discussion like that going." But they had to employ the concept in a living challenge and they sat back there for 30 minutes working out how to do it. Their consciousness was raised at least to the level of a prepositional phrase. It's like any practice. (EX 2)

### *Exemplars' Lives Summary*

A second qualitative finding of the study was exploratory and addressed the research area: *What are exemplars' lives like?*

First, nominators described exemplars most centrally as deeply engaged in life and meaningful relationships, as evidenced by:

1. Exemplars' personal impact on the nominators, enduring painful life experiences, valuing helping others, being sought out for counsel, the validation of peers, and remaining in contact with themselves.

Second, in the semi-structured interviews, three overarching themes captured the core of exemplars' lives:

2. Exemplars are intimately connected to loved ones, mentors, and their own moment-to-moment experiences.
3. Spirituality is important, as reflected in exemplars' beliefs and practices, including a union of spirituality and life; the practicing meditation, attending retreats, and being engaged in a reflective articulation process.

4. Exemplars are impactful in the lives of others as luminaries, transformational agents, and teachers with particular technologies.

*Section 8: Exemplars' Opinions of Wisdom: Core Themes From Interviews*

*With the Exemplar Group*

A third qualitative finding of the study was exploratory and addressed the research area:

*What are exemplars' opinions of wisdom?*

Exemplars defined wisdom most significantly as arising from the unknown and as practical. They offered multiple technologies for the cultivation of wisdom-related processes, primarily the relationship with a mentor, although there was disagreement about whether wisdom as itself was teachable. Examples of wise behavior included contacting/connecting with another human being, restraining action, and making an important life decision without knowing why. Exemplars seemed to think that people are wise about different things and nominated predominantly spiritual and religious figures as wise. The following expands on these findings, and a summary will follow this section.

*Exemplars' Opinions of Wisdom: Defining Wisdom Arises From Not Knowing, Uncertainty*

Seven of 20 (35%) exemplars defined wisdom as arising from another source through not knowing and uncertainty. Surrender, spontaneousness, unconditioning, coming from another source, and the small, still voice in the wind are all descriptors within this thematic definition.

Five examples elaborate below:

Wisdom arises out of a pregnant emptiness. It's a surrender of everything that you think you know . . . it's accepting your heart and your helplessness. When you're no longer engaged in a solution or in a goal with what has to happen or what you think should happen, no longer protecting yourself against whatever the outcome is, there comes a gentle wisdom from the heart that expresses the meaning of the moment without attempt to change it, or control it, or influence it. (EX 17)

For me it's what arises when I admit that I really don't know anything. It's like something that comes spontaneously from being willing to sit in the not knowing. And having no personal agenda. So that whatever movement happens is happening almost through you rather than from you. It's being willing not to be attached to your ideas. It doesn't mean that what you know or you've learned or you've experienced isn't useful, because in a way that, for me, that integrates with this other kind of intuitive knowing. But it's sort of like letting the flow arise rather than going at it from an analytical perspective or a memory perspective. I don't know. I guess I think of wisdom as kind of a universal quality that pops up once in awhile in anybody. And it's coming from some other source in a way. So it plays through us when we're not overly involved in our concerns. (EX 9)

Wisdom. I don't know. I'm hearing the word pure, unconditioned truth. It feels very simple and unadorned. Something that's here and accessible to any of us from the not knowing. I think not knowing is probably a key to opening that door to wisdom. Spacious . . . it's egoless. When wisdom is being spoken, it's egoless, or wisdom is being demonstrated, there's nobody there intruding, in that sense. But there is a way somehow—and it may be different moment to moment. But I think when it shows up that there's a feeling. There's a sense of presence that something bigger than what's human is on board and it needs to be honored or listened to, or be servants to that. (EX 6)

Wisdom is not always—despite what I say about reasoning and thinking—wisdom is not always accessed by your thinking and feeling, and sometimes it's the still, small voice in the wind, or waking up in the morning and knowing the answer to something that you went to bed with the night before. (EX 14)

There isn't such a thing as a wise man or wise person. There are people in whom the dynamics of wisdom reside. And they've incorporated that and they've found a way to live it out very simple unassuming terms. The thing to fear is when somebody claims to be wise. You know they don't have it. Because we don't create wisdom. You simply learn how to be connected with it, be alert to it and incorporate it, and find that way of living it out in our life itself. That'd be as close as I could come to a definition. Again, it has more to do with the process of living than absorbing a lot of content. (EX 11)

### *What Works, Is Practical, and Can Be Applied*

Seven of 20 (35%) exemplars defined wisdom as what works, is practical, and can be applied. Accumulated knowledge and experience, discernment, contextual relevance, answering questions, and sharing with others all reflect the core of this theme. Six exemplars elaborate below:

I just think of it as the application of accumulated knowledge and experience. I don't know that wisdom is any good if it isn't—or what it's for if it's not applied, if it's not a living kind of thing. Was it Chaucer's criticism that the driest scholar who reads

everything, knows everything and it's just all contained within him and her. So it's the application side that I think manifests whether it's wisdom or not. (EX 19)

Wisdom. I guess, to know when to do something and when not to do something, when to cut your losses. I think it's different from say intelligence. Intelligence is the ability to solve puzzles, learn words. I think wisdom is the ability to put things together in a way that maybe is more effective or more productive. And using good judgment. Some people who are very smart can be very self-destructive. (EX 1)

Wisdom is an impersonal knowing of the most helpful response in the moment. It is not based on bias or self-interest. It functions best when there is a positive regard for life and a willingness to be impartial. It is unselfish. It may draw on what we have learned from others but it is not based only on prior knowledge but rather on a willingness to be present to the whole truth of a situation, and the ability to impartially assess what is needed. (EX 9)

At heart is what works. At heart, I think, is what makes sense. At heart, I think, it's trying to go along with or cooperate with how the world is put together instead of fighting it. And I think the world is put together with love and by a God who's working to heal, to reconcile, to make whole, to build up, to bring shalom into the hearts, relationships, communities of the world. And what works to promote that is holy wisdom. You know? It's how things are put together, suggested by Genesis 1 because it is the spirit, the female spirit of God who actually hovers over the face of the deep, the chaos, and begins to bring order out of chaos. So essentially, wisdom is what promotes that and whatever don't, ain't, that's the way I see it. And I really think that the human race is gradually learning mainly because what isn't wisdom fails in the long run. It destroys, it tears down, it just doesn't work. (EX 7)

Wisdom consists of knowing what is the case, what it means, how it relates to you, how you should relate to it, in whatever situations arise; being able to separate yourself from conditionings when necessary; knowing when to use reasoning and when to use intuition, when to let go of reasoning and use intuition, when to let your feelings guide you and when to put the feelings aside. Wisdom, in another way is what provides or enables you to know the answers to questions that emerge in your life. (EX 14)

Wisdom to me isn't wisdom without sharing. It seems to imply some sort of relationship even within the self, parts of the self. That there's a desire for creating something new or creating something that furthers existence in some way. I almost want to say that it has a life-supporting or life-enhancing quality to it for me, a hope for continued existence. (EX 4)

### *Suffering, Pain, Grieving*

Three of 20 (15%) exemplars defined wisdom as life experience that includes suffering, pain, grieving, and the potential for learning. Three examples are given here:

Wisdom also comes out of a mourning of a pregnant emptiness, the mourning. By that, wisdom seems to come out of grief, out of a deep, deep sadness of acceptance of pain, of limitation; which is another way of saying of surrendering one's thoughts or power to the moment. And I think that gurus, you know, who are so-called wise, they really, what they do is that they have, they have known suffering and have stayed with their humanity. And so they have nothing that they have to try to control or necessarily even teach. So you come to them, and you look at them, and you bring your problem; and they smile [chuckling]. (EX 17)

Wisdom is sometimes imposed upon one by life, like ouch, that hurts. I'm not going to do that one again. And so the application there is just the simple thing of remembering what to do or not to do. (EX 19)

I think you could only come upon wisdom after having lived some years, I think, and have come through some, a lot of experiences, good and bad, because that's life, I think—setbacks as well as accomplishments. And to try to be level enough to see it for what it is. And I think with each thing you go through or whatever, I think I'm sure you must gain a little wisdom. You think, gee, I wouldn't do it that way again. Oh, that's why, or whatever. (EX 18)

### *Self-Knowing*

Three of 20 (15%) exemplars defined wisdom as self-knowing and learning how we know what is true for us. Two exemplars elaborate below:

Wisdom—self-knowing would be wisdom. It's not something you learn outside. Wisdom is an inner knowing. (EX 8)

I think your own wisdom is learning how you know when something is true for you. I mean, and I ask people that question all the time. How do you know when something is true for you? And they always show you [laughter]. They do. Like, you looked down and to the right. So that tells me that, to you, it's a feeling. And it is for many people. But people need to know how they know, and that's the thing that I try to get people working on when I first meet. How do you know when something is right or true or good. It's probably the best thing you can know about yourself, and that's based on a lot of things. I mean, it's based on experience, trial and error, that kind of thing. (EX 5)

### *Being Part of the Whole, Connected*

Four of 20 (20%) exemplars define wisdom as the recognition of, and abiding connection to, being part of the wholeness of life. Exemplars spoke about it this way:

I define it as non-discrimination. Being able to see everything connected and part of a whole. And to stay with—be able to stay with that and live with that. That's, that's real wisdom. (EX 20)

Wisdom has certain characteristics like spiritual maturity or open-mindedness or an attitude of compassion and caring and a sense of connection to the world, not only to people but to all creatures and to the environment, to recognize that we're part of a living organism. The universe is alive and that we find no matter how much we know, there's always more mystery. Wisdom is "how do we relate to the great mystery and the unknown?" (EX 10)

*Exemplars' Opinions of Wisdom: Core Themes of Wisdom Technology (Strategies)*

*Mentors and Teachers*

Ten of 20 (50%) exemplars spoke about (acquiring wisdom) wisdom-related acquisitions through mentors and teachers. Exemplars identified as important: role modeling and watching how mentors and teachers live, practicing what they are practicing, the consistency of relating, being helped to find your own way within, and cultivating deeper accessibility. Below are some examples:

The best way to learn it is to hang out with wise people . . . You become wise when you spend time with somebody who has some wisdom. And just that consistency of relating for a period of time, you get to know how people think and how they respond and so forth. So that I think that it's a matter of finding the people that you admire and that you want to hang out with or work with. So that's how you pick it up. (EX 10)

I guess I would say that to some extent wisdom is teachable. It's probably more likely to be taught by people who model it, like anything that's really important, you know, piano playing or research or whatever it is. You need somebody to kind of catch your own genius with, you know. See it in them and then—You don't copy what they do. But somehow they inspire you in such a way that you can find your own way of doing it, sort of catch it by being in their presence. That's how I've learned anything that's really important to me. Anyway, the books are fine. There's nothing wrong with reading books or going to lectures or whatever. But that's not really where you learn how to live or how to be a great thinker or researcher or baritone or whatever it is. You learn that by enormous amount of practice and hanging out with people who do it well. (EX 20)

For me with my teachers, I would say it was a twofold process. One was kind of, in practicing what they were teaching, I began to see what they saw. And so I could appreciate the wisdom in them from the wisdom that was growing in me because they showed me how to see in a certain way. And then I realized, oh, that's how they're seeing. So that was, I think, one powerful appreciation of their wisdom. And the other was just in watching how they lived. You know, and it's not to say, I mean, in many of my teachers it's not that I didn't see at certain times, you know, certain faults of things that I thought were not that skillful, but overall, I could really appreciate the wisdom of

how they lived just in basically leading good lives, basically wise and compassionate lives. (EX 15)

I mean, it's probably—it's almost like in Tibet, the way the Tibet teachers argue, which is you have to get it from a teacher, a living human teacher. A book is not enough. (EX 19)

I think that a way wisdom is passed on is people find their path, or somehow discover their path, and there's someone ahead of them that can see them on the path. And they say, "No, no, no, no. You're getting a little too far to the right. No, no, no, no. You're going too—a little too far to the left." And that appears to be helpful . . . Then they're doing whatever they're doing . . . with—in their life with all the exigencies and suffering that they face. And through that combination wisdom can result. Not necessarily will, but can. (EX 20)

I don't think you can teach wisdom, but I've witnessed people cultivating accessibility to wisdom, and I think that can be taught. I know that can be taught. I see it all the time. It's cultivating people's access. And, again, it's sort of saying, "Just turn left and look here. There is the door." Kind of that, it's accessible to all of us. And imagine a world where everybody knew how to access that. (EX 6)

I think role-modeling certainly, that's probably the best form of education anyhow. Like any good mentor, you show by example or stay connected, support the other person developing their own way of doing things. (EX 1)

I really do strongly believe that truly seeing somebody . . . believing them and mirroring it back . . . is the way people learn about their own presence, and what they want to keep, and what they want to move away from. (EX 13)

I think you have to listen to people who have lived longer and more widely than you have. Just listen to what they have to say. I think listening is very important. (EX 18)

What you really need to teach/learn through mentors is how to access that within yourself . . . How to access that within you. (EX 5)

### *Let Arise From a Larger Source*

Eight of 20 (40%) exemplars talked about learning wisdom as a letting go, surrendering, and experiencing an incarnation from something larger than the individual. Six examples that illustrate the theme are offered below:

And that—and I guess that's another argument for saying that wisdom is very much something that happens through you because so is love. It's like when you can let yourself be completely open and let go of your own biases and your own conditioning and your own need to hold yourself together, then both of those qualities can spontaneously emerge. And I think the true gift of spiritual awakening is the emergence of both of those qualities, when they're needed, or when there's, you know, it's not like

you go around all the time feeling wise and loving. It's just that life responds to as needed with those qualities spontaneously . . . Then beginning to trust what arises spontaneously. (EX 9)

No, I don't think so. I think that simply the heart or spirit, if you want to use the Jungian term, the self in the larger "S." has a wisdom. It's amazing to me when I give up and let go what information comes to me; what direction I find to go. Say, a wise heart or movement inside of me that I have to constantly return to who, that gives me that. I don't think you can teach it; it comes out of the, it comes out of the experience of surrender. But that's a lifetime. (EX 17)

Being able to surrender is the number one attribute. Can you let go and get out of the way and surrender to something that's bigger than you? (EX 8)

And, in fact, the study we did was, in a way, teaching people to access wisdom, showing them a way that their consciousness could come up with an answer. (EX 14)

The disciplines of how one responds to and takes in, you know, the phenomenon of wisdom can be pointed to and taught and so forth. But it's like can you really teach people to be wise? Can you really teach people to have a deeper inner sense of themselves? Can you really teach them that? And I don't think you can. I think it's a matter of learning how to open one's self up to that. But you can teach the way to be aware and absorb, you know, the honoring of life and its wisdom. But it's not a commodity. I guess that's what I'm trying to say. It's not a commodity you can teach. It's something by the grace of life itself that can be incorporated but it's not an achievement . . . It's an incarnation. Not dissimilar from the Christian sense of incarnation of God and Jesus. So I really think it has a much broader metaphysical quality to it other than just the human accomplishment. And teach, I think, how one can receive it, but you can't teach wisdom. Nobody ever truly has fully incorporated wisdom. It's much bigger than the individual. (EX 11)

Could being wise be taught? Or having this experience of wisdom—I guess what would be more true for me would be the process, the cognitive and non-cognitive. So all the other ones, somatic and intuitive and, you know, getting information from other sources: emotional, body, psychic. The processes that would lead to that experience, the experience of wisdom, and then the subsequent urge to share. I think those can be cultivated, definitely. (EX 4)

Sometimes it is wise to trust how life is unfolding even when we do not a clue about what to do, or why we responded the way we did. Some movement wiser than us may be in charge. (EX 17)

This may go back to one of the things that I really trust and believe—that there is an unfolding wisdom that enfolds us beyond what we can create for ourselves. That life is beneficial to us in spite of all the anxieties and difficulties and frustrations and deprivations and all that stuff. And honoring both the consolations and the desolations,



because they're both meaningful. They both have their own way of evolving your life. (EX 11)

*Getting Mind Out of the Way, Decentering From Primary Identity as Thinking*

Six of 20 exemplars (30%) spoke about learning wisdom-related processes as facilitated by decentering from a primary self-identification with the thinking mind and cognitive processes.

All six examples are provided below:

A reduction in cognitive processes, so that you're not totally in your head, and more access to feelings and education of feelings. (EX 8)

Another aspect is facilitating empathy and getting the conscious mind, not just thinking, not just sense—getting the conscious mind out of the way and providing quiet time. It's the same sorts of things that you would think of in some kind of meditation or spiritual practice where you are getting the conditioned automatic reactions out of the way, out of the dominant way, so that any of those that are appropriate may be used, rather than ones that are overly conditioned. (EX 14)

You can only point. You can only point to a way of holding something that's bigger than the mind. When you stop paying attention to your mind it stops being such a bother. When you stop taking it so seriously. When a thought comes through and you just look at it and say, whoa, that's interesting. Wonder where that one came from. But you don't buy into it and create a big story around it. Pretty soon that function stops functioning in the way it does when you really believe you are your thoughts. I think that most of the time we humans think we are our thoughts. (EX 9)

Certainly, not conceptually. (EX 20)

Also there are a myriad number of specific techniques and strategies from gently helping people recognize presuppositions; and then recognize them as presuppositions rather than as facts . . . then encouraging people to test those presuppositions. (EX 16)

Let go. Get out of your head. Being in the head is a total detriment, a total detriment. Remember the mind is always looking for answers the soul already knows. (EX 8)

*Learn From Experience/Reflection*

Four of 20 exemplars (20%) spoke about acquiring wisdom as learning from experience and reflection, a kind of iteration process. Below are four illustrations:

One acquires wisdom, in large part, by reflecting on experience. And so to teach wisdom involves helping people reflect on their experience. For many people, that means helping get in touch with their experience in the first place. Also there are a myriad number of

specific techniques and strategies from gently helping people recognize presuppositions; and then recognize them as presuppositions rather than as facts . . . then encouraging people to test those presuppositions. (EX 16)

There's a reflection component, there is an iteration of looking at something. Whether it's practical or spiritual within the self or outside the self, there is a reflection and an action and a refinement and a reflection and an action and, from what I know, it's called, you know, double-loop, triple-loop learning when you're going over and over. And then finally comes out something that is helping you overcome an obstacle, reach more joy in your life, solve a problem, practically create something that's going to help your entire tribe survive. That level of internal processing has to be in place. (EX 4)

When I think about the people I've known through my life who are wise, I think I would conclude that they had a lot of life experience. It just didn't arrive with them in their genes. (EX 19)

I think a person's ability to learn from experience. (EX 5)

#### *Motivation/Commitment/Investment and Doing the Work Ourselves*

Five of 20 (25%) exemplars spoke about the relationship between motivation, commitment, and doing the work oneself as integral to the potential to learn wisdom-related processes. Five exemplars spoke about it this way:

One of the most important things of all for learning wisdom is a commitment to doing so, the commitment to learning and understanding. (EX 16)

A strong motivation. You can sit quietly for an hour and nothing happens, but if you go in with a motivation to say, "I want an answer to this. I want to know what's right for me," if you set an intention—and that's the word that we're using now—set an intention, then wisdom tends to be pulled into that magnetic direction. (EX 14)

I think there are a few things. One of the things that has been my prime motivator over all these years is the quality of interest, just being interested in the mind, in suffering, in what causes it. And so in some ways, the truest meaning of the word philosophy, you know, kind of lover of wisdom, it's just that real interest in understanding I think is a very powerful force. What can motivate that interest can be different things. (EX 15)

In order to make it a real living wisdom, then it has to be a methodology of training attention so that we can see things clearly for ourselves. And that is the whole methodology of the path. So it can be taught, but people need to do the work themselves. It can't be given. There's a famous line in the text about how the Buddhas only point the way, and everybody needs to walk the path for themselves. So the way can be pointed

out, and the path of practice can be pointed out, but real wisdom develops only when we actually do the work. And it's the work of paying attention. (EX 15)

And the thing that worried me the most about that is if somebody else knows and somebody else tells you, then you're always a receiver and you're never an actor. We really only learn through the things we do. (EX 13)

*Exemplar's Opinions of Wisdom: Acting Wisely*

In addition to defining wisdom and offering multiple technologies for wisdom-related cultivation, some examples of wisdom-related behavior included making an important life decision without knowing why, contacting or connecting with another human being, restraining one's action, and recognizing an important relationship. The following expands on these findings.

*Acting on Not Knowing*

Five of 20 exemplars (25%) exemplars spoke about wise action as making a significant life decision while acting on guidance, but without knowing exactly why. Trusting not knowing, letting information arise through intuitive channels, tolerating fear, letting go of preconceived plans, and allowing the mind to second guess without being swayed are all components within this theme. The following five excerpts are taken from exemplars:

What is it to act wisely? If it's to act on guidance when you don't know what the hell you're doing and have no clue what's going on, I can say I've done that a lot, and had no clue. Certainly didn't have the thought, "Well, this is wise," or "This is a wise decision." I usually wondered, "What the hell am I doing? I don't know what this is." So if my definition is acting out of not knowing and following the guidance, I could say I've done it a lot [laughter]. I don't ever know when I do something, you know. If I'm attentive and I'm listening and I'm trusting, you know, and I've come to trust where things come from. My mind might be saying, "This is so fucking weird." You know, "What are you do—this is crazy," or—you know, I don't listen to that anymore. The mind will still chatter that way, but I think I guess I've had enough experience over the years to trust what comes, that there's an "organicity" to it, and it feels so embodied. Again, the body piece is important to me. When it feels that embodied, I really trust—as bizarre as it may look or sound or seem, or whatever—or whatever even my mind might judge about it. (EX 6)

Knowing when it was time to let go of being a stockbroker despite a huge promotion. Knowing that my future was out here in California, not where I was, and trusting that

there something else I was supposed to be doing. These were, at the time, scary decisions but they all turned out to be correct. So part of me just knowing my future . . . I just knew in some deep, intuitive level, I knew this was not what I really wanted and I trusted that. So it really comes down to what Shakespeare said: “To thine own self be true and it shall follow the night to day though can't not be false to any man.” Part of me has always believed in myself. At some points in my life, not quite that much but just enough to make the right decision. The right decision. And having the courage to listen. My journey is that I have listened and responded. (EX 14)

When I came to where I'm teaching now, I think that there was a wisdom in realizing that that was a place that I needed to stay, although I wasn't planning to have that kind of a career. Again, that listening to what I knew was happening for me that I knew that they needed me and I needed them. Which, I think, is a wise way to create any kind of relationship. (EX 13)

I was teaching at “S” very successfully, but I realized that I was—looking back on it, I realized that I was kind of getting settled. I wasn't learning anything new. The field I was in was beginning to pale. But S was a prestigious university. I was getting paid a salary. I enjoyed the teaching. Students were interesting and appreciative. And then S decided that they didn't want a graduate department in the area that was my area. And so my contract wouldn't be renewed. So the decision to get out of the field, and out of academia per se, led to me being in a totally different kind of field, and one that has been wonderful to me. And a year after this new school started, another school set up a program of great interest to me. So, I was able to make enough money by teaching in both of those programs. So, it was a really life-changing decision that simply made itself evident to me. It fits with what I was saying about circumstances kind of pointing the direction for me. (EX 14)

There was one situation where I had the opportunity to make a very, a very big gift of something. And this was like—it was a huge amount. And the thought came to do this, and I was just kind of watching my mind. Should I?—because it was like many orders of magnitude more than what I would usually do or even feel that I could do. And then just in watching my mind and deciding, no, this is the right thing to do and feeling really happy about it, of having done it is when I think about it now, so I really feel like that was a moment of wisdom coming in instead of second guessing myself and saying, “No. That's too much, da, da, da, da, da,” all the reasons one could give. It was wisdom that came and no, no, this is good. So that's kind of on that side. (EX 15)

### *Contacting Another Person*

Five of 20 exemplars (25%) spoke about acting wisely as contacting or connecting with another person in a way that was meaningful. Sitting and listening, persistent availability, letting go and being with one's own pain, and staying connected despite adversity are some of the examples below:

What concrete incident comes to mind right now is something that's just happened. I'd been working with this young woman for 10 years and she had such an ingrained, deep, incorporated, un-mitigating, and untouchable dimension of belief that everything she wants she shouldn't have. And I stuck with her and keep pointing this out and addressing it in many different forms, and carrying inside of me a recognition of hope and possible change through circumstances in her life that she could receive the good things that are happening. Well, lo and behold, you know, the depth of what she had been wanting, which is a significant relationship with a man, is now in seminal form beginning to emerge. And it seems to be coming into fruition. And it's not that I have given her all kinds of wise advice, which I haven't done. It's that in the sense of my own inner wisdom I've stuck with her in the hope that, and the support of the emergence of another part of herself that she has so suppressed. And it's coming to fruition. The thought about my wise intervention has more to do with sticking with it. The persistence of my availability and accessibility and intervention and helping her focus her life in a way that potentially can do that, get there, but just absolutely invents every possible way to deprive herself of her own inner senses about life. (EX 11)

What comes to mind is, is counseling people, just sitting and listening. And trying to hear the presuppositions which are causing them suffering. And somebody questioning those. That's what comes to mind. (EX 16)

Yes. Yeah, I think there was one that was really was a changing place in my life. In that moment I was with a client, and she, she wanted me to work with her, but not in bioenergetics; that is, not through the physical dynamic. She'd already gone through that. She wanted me to work with her in a little different way, which more kind of a self-psychology way. And, and I, I learned that. And I was with her. But anyway, one day as he was quite in pain, a lot of pain, and she, and I have this in my book. And she, I knew what to do or what I thought I knew what to do from my orientation, from the orientation of my training and what I did best, in how to contact somebody in this state. But anytime I would attempt to do that, she would, like an intrusive mother to her. And I realize that, you know, I was helpless in this state about how to help her, and yet I cared for her. So I said to her, it sounds like you're asking me to sit here and watch you drown. Is that right? And she said, yes, can you do that? And I just closed my eyes for a moment and went in. And felt all the pain in my heart of feeling for her in this desperate place. Had all the ways that I had learned over all the years to contact people here and to help them. And I realized that all of my form and structure of how I did therapy was to avoid my own pain; the pain of just staying with my, with my heart, and my helplessness. And as she was asking me to do now with her what I had been asking her to be able to do; to let go and just be with that pain and let me be with her. But I also felt true at that moment, if I let go of all of these ways that I have of helping people, what is left; and of what value is it? For me just to be there with my own pain, see. And I could feel some of the shame, some of the very deep hidden shame about being not really worthy. Or what I, what I, who I am would not be enough. But I stayed with it because I said, I have to do this. She, she needs this from me. She needs this from me. So something gave me the courage just to stay there. And I cried [unintelligible]. And I opened my eyes and she had totally changed; her countenance had changed, a smile had come. And she reached out and made contact with me. And she said at that moment that she saw my struggle to stay in my heart to be with

her, and what a gift that was to her. And that was a turning point for her therapy. And it was a moment of wisdom that just happened. I didn't do it because this is the wise thing; but I happen to be able to know that I needed to do that. Out of that came a connection. So that was a moment of acting wisely without acting wisely [chuckling]. It has no ego to it. (EX 17)

Might have acted wisely. I think when my son was a teenager, he was going through some stormy periods, and I managed to stay connected. Helped him stay connected to me, kind of just through some tough times. I apologized to him for my . . . my part in what happened. Then he was in despair and I said to him that I wasn't going to let him fail, we were in this together. (EX 1)

### *Exercising Restraint*

Three of 20 exemplars (15%) spoke about acting wisely as exercising restraint. Knowing “when to keep their mouth shut,” recognizing something as not a good thing to do, and realizing that the desired action could cause harm to others and themselves are components of the following exemplar excerpts:

What occurs to me is that there were times when I kept my mouth shut [laughter] instead of saying what I thought. I think really that I wanted to say something or I was mad about something and, you know, tell somebody off or something like that, but I didn't. I think it even saved my life one time when I was with a real crazy guy. You know, because being a shrink can be a dangerous thing. And you've got to be a thrill seeker [laughter] in a way. You know? When I think of times I've been wise, it's just really times when I shut up or knew when to shut up. I can't say that I came up with anything. (EX 5)

Sometimes it's on the side of restraint. I've been in situations where I might have had a strong desire for something that really wasn't that wholesome, but being really caught in the desire and then moments when wisdom comes in. And [laughter] sometimes it took a while; it took many moments of wisdom to allow me to unhook and say, “No. That's not a good thing to do. Don't do that.” And I'm really grateful for that. So it can play out in many ways. (EX 15)

You know, it's interesting because I think a lot of what I would describe as something maybe that was wise acts was what I didn't do. How I restrained myself from acting. When I have actually been able to do that, I've thought, that was probably the wise thing to do, in retrospect, and be OK with that. So most of it's what I haven't done, you know, when I've really been pissed off and not said something or done something. And those happen on a fairly frequent basis over time, over a life. I was just realizing that I'll do harm. Do harm to whoever it's directed at, harm to myself. Seeing that as clearly as possible. That's usually what I would say is behind it. (EX 12)

### *Recognizing an Important Relationship*

Three of 20 exemplars (15%) spoke about acting wisely as trusting the recognition of an important relationship and allowing it to unfold. Below are three examples:

Well, first of all, I'm a little bit daunted by having anybody call me wise, because that seems a little silly. But having had periods of wisdom, yes. I think I was very wise when I met my husband and I was 17 years old and I knew that I was out of sync, but nevertheless it was the most important thing. So that was very wise to listen. And I think that's one of the times I learned that I really had to pay attention to what was happening inside of me . . . and that no matter how wise the people around me were, I had to listen to myself. (EX 13)

Letting myself have the relationship that I had with Adyashanti, that was really wise. Recognizing him and trusting him, even though he's young enough to be my son. And just trusting the feelings that were arising and the connection that was arising. Just really going with it. That was really wise, because it made a huge difference in me. (EX 9)

One was when I was going with my wife, and the relationship was at a crisis, and I came to the decision that we should—that I would marry her. It wasn't that we should get married in that sense, but more a decision to get married. I think that was very wise, and it went against all of my tendencies to be self-sufficient, to let go of a lot of my identity, and be a part of the relationship. That was very successful and we had many difficulties all the way through until mostly finished, mostly gone. But it was certainly the productive thing to do, and worthwhile emotionally, relationship-wise. (EX 14)

#### *Exemplar's Opinions of Wisdom: Wise Persons*

Exemplars seemed to think that people are wise about different things and nominated predominantly spiritual and religious figures as wise. The following section elaborates on these findings.

#### *People Are Wise About Different Things*

Seven of 20 (35%) exemplars mentioned that they believe people are wise about different things. Professions, personalities, and life roles are just some of the variables in the following seven examples:

I guess you'd have to say people are wise about different things . . . I think my daughter's really wise in many ways with her children. She's just so present with them. I think some people are wise about money. They're practical and manage well. And some people are wise about relationships with people, you're always really comfortable with. I don't

know. I guess I think of wisdom as kind of a universal quality that pops up once in awhile in anybody. And it's coming from some other source in a way. So it plays through us when we're not overly involved in our concerns. (EX 9)

The trouble I have is the people I'm thinking about, they're wise in some ways, and they're not wise in other ways. So it kind of clouding up my channels here. Because they can be wise in one part of their life and not wise in other parts of their lives. And so it's not unequivocally wise. I don't even think people like Mother Teresa were wise. They were completely unbalanced. And yet they were wise in one little way, she was. And a lot of people are wise in those little ways. But who has it all together in terms of living a balanced life? Oh, my goodness. Well, my wife is very wise. I think my wife is very wise. I think my children are fairly wise. Not, not all the way. (EX 7)

I think of exemplars of wisdom, I think that they're a variety of different personalities that can be wise. And the other thing is I think people may be wise in different ways in different areas. Some people can be very wise in one area and not so wise in other areas. It's like I don't expect that somebody, just because they're a teacher, for example, spiritual teacher, they may have a lot of wisdom in one area and none at all in other areas. And I think that that can be so disillusioning when somebody puts a teacher up on a pedestal and then they turn out to be less than perfect. And they always do, because we're all just human. So I wouldn't hang it on any particular quality except the sense of caring and respect. (EX 10)

Well, most of my teachers are/were wise. And also they are wise in different ways because wisdom shows itself through the prism of many different personalities. And so I think it's a mistake actually, and I've made this mistake myself, to judge a person on their personality. You know, maybe somebody whose personality is not that appealing to us but who actually may be very wise, and so I've had a few lessons in that. Not rushing to judgment and dropping beneath the personality level to really see what a person does understand. So I think that's an important piece because for the most part we tend to get hooked in on the personality level in terms of our assessments of people. But I don't think that's really the best assessment. Yeah. I mean, I've had some remarkable teachers who really were very wise. I just don't think wisdom shows itself in any one particular way in terms of either personality or lifestyle. (EX 15)

I think the biggest misunderstanding about wisdom is that like somebody is either wise or they aren't [laughs]. I think wisdom comes and goes for all of us. You know? And that it's important not to put labels on things. (EX 13)

I had one teacher, a mentor. I thought he was pretty astute. I think my father in some way was kind of wise, although in some ways he was kind of stupid, but I think he had some innate instincts that were pretty good, helpful. Yeah, he was a survivor, and he was a provider, you know, a protector. I think emotionally he didn't understand things too well, but that's the best he could do, looking back on it. (EX 1)

I think my recognition of wisdom in others is really measured by the kind of impact and timely impact that they had upon me and my own involvement. And whether they're wise



or not, they provided a very wise intervention in my own involvement in life, you see, as part of that process. And whether it was intentional or just kind of that's the way it is, or whether they were or were not functioning with a self-awareness of being wise, it just provided some wise perception, perspective for me. I think it has more to do with not who's the wise person, but is that person able to function with me or with others out of the wealth of wise, of the wisdom. And so, even the Dalai Lama, he'd be the last to claim wisdom or being wise, I think. But there is an awareness that there is a flow through that person that is very wise and just kind of integrative or moving, helping you move along the pathway. So I'd be hard pressed, you know, to really say well that a person exemplifies wisdom. (EX 11)

*People Whom Exemplars Named as Wise*

As can be seen in Table 13, there were 7 people exemplars nominated multiple times as wise and 24 people exemplars nominated once as wise. The majority of nominees were spiritual and religious figures, followed by family members, political figures, psychologists, philosophers, scientists, and others.

Table 13

*People Who Exemplars Named as Wise*


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Multiple Nominations	Single Nominations
Dali Lama (3)	Carl Jung
Jack Kornfield (2)	Eckhart Tolle
Adyashanti (2)	Barack Obama
Desmond Tutu (2)	Albert North Whitehead
Pierre Teilhard de Chardin (2)	Joseph Goldstein
Einstein (2)	Frances Vaughan
Grandmother (2)	Ken Wilber
	Stanislav Grof
	Martin Luther King
	Jesus
	Huston Smith
	Barbara Quinn
	Irene de Castillejo
	Malcolm X
	Trudy Goodman
	Ram Dass
	My father
	My husband
	My children
	My students
	My uncle
	My grandfather
	My teacher
	My nextdoor neighbor

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*Exemplars Opinions of Wisdom: Section Summary*

A third qualitative finding of the study was exploratory and addressed the research area:

*What are exemplars' opinions of wisdom?*

Exemplars defined wisdom most significantly as arising from the unknown and as practical. They offered multiple technologies for the cultivation of wisdom-related processes, primarily the relationship with a mentor, although there was disagreement about whether wisdom itself was teachable. Some examples of wise behavior included contacting or connecting with another human being, restraining action, and making an important life decision without knowing why. Exemplars seemed to think that people are wise about different things and nominated predominantly spiritual and religious figures as wise.

## Chapter 5: Discussion

The purpose of this chapter is interpreting and discussing the qualitative and quantitative findings in the context of the study's confirmatory hypotheses and exploratory research areas. With consideration of previous research, current findings, and some subjective experiences, this will be accomplished by highlighting particularly significant threads through the wisdom-related qualities, lives, and opinions of exemplars.

Lyster (1996) reminds us, "Given wisdom's long history and complexity, any empirical attempt to investigate wisdom is an ambitious undertaking which is bound to fall short of adequately defining and exploring the meaning of the construct" (p. 171). Accordingly, the following perspectives are partial, and wider conversation and reflections beyond the scope of this dissertation are intended. The researcher is left with more questions than answers, more uncertainty than certainty, and more invitations for reflection than wise reflections.

The chapter is organized into eight sections:

1. The first section provides a concise summary of the findings.
2. The second section examines and interprets confirmatory hypotheses.
3. The third section discusses exploratory research areas with a consideration of confirmatory hypotheses.
4. The fourth section discusses exploratory research with a focus on exemplars lives and the importance of spirituality.
5. The fifth section integrates the findings.
6. The sixth section offers final thoughts, summarizes key learning's, and provides study implications.
7. The seventh section lists suggestions for future research.

8. The eighth section provides limitations and delimitations of the study.

### *Section 1: Summary of Findings*

The study was comprised of two samples, the exemplar group ( $n = 20$ ) and nominator group ( $n = 15$ ) group. Exemplars' average age was 69.5 years, approximately 10 years greater than the average nominator age. Nominators knew exemplars on average 25 years in multiple contexts, most often having exemplars as their colleagues and teachers. Exemplars were predominantly Caucasian, very well educated, and most were married or had a significant other. Nearly all reported having a current religious or spiritual tradition and practice.

#### *Exemplars' Wisdom-Related Qualities and Characteristics*

*Self-report measures.* The average exemplar score on the Self-Assessed Wisdom Scale exceeded the cutoff considered to be wise 201.6, consistent with the prediction. Exemplars' average scores on the Loyola Generativity Scale (LGS), Mindful Attention Awareness Scale (MAAS), Satisfaction With Life Scale (SWLS), Big Five Inventory (BFI) Openness to Experience, and Spiritual Perspective Scale (SPS) exceeded the normative mean scores for each measure by at least 10%, consistent with the prediction.

Exemplars' average scores on the State Trait Anxiety Inventory (STAI) and Perceived Stress Scale (PSS-10) fell below the mean normative scores of each measure by at least 10%, consistent with the prediction. Exemplars' average scores on the Narcissistic Personality Inventory (NPI-16) and STAI Trait-Anxiety did not fall below the mean normative scores of each measure by at least 10%, inconsistent with the prediction. Exemplars' average score on the WUSCT exceeded the highest conventional stage of adult development, the Achiever, 4.0, consistent with the prediction.

*Pearson product-moment correlation coefficient.* There were found to be statistically significant positive correlations between the Self-Assessed Wisdom Scale (SAWS) and: BFI Openness to Experience, Spiritual Perspective Scale (SPS), and Humility Inventory (HI), consistent with the prediction. There were found to be positive, but not significant correlations between the Self-Assessed Wisdom Scale (SAWS) and: Mindful Attention Awareness Scale (MAAS) and Loyola Generativity Scale (LGS), inconsistent with the prediction. These results suggest that higher levels of wisdom were correlated with increases in openness, humility, and the importance of spirituality.

#### *Qualitative Exemplar Wisdom-Related Qualities and Characteristics*

*Nominator narratives and exemplar interviews.* Six significant personal qualities were found in the nominator narratives about exemplars: honesty, compassion, spirituality, integration, understanding, and openness. Four core personal qualities were found in the semi-structured exemplar interviews: they tell the truth, are able to tolerate uncertainty, are grateful and appreciative, and are funny and lighthearted.

*Foundational Value Scale.* Exemplar qualities rated most highly by nominators on the Foundational Value Scale (FVS) were intelligence, having a sense of meaning and purpose, harmoniousness, and spirituality. The lowest scoring qualities were genius and being animated.

#### *Exemplars' Lives*

*Nominator narratives.* Overall, nominators described exemplars as deeply engaged in life and meaningful relationships. This finding was evidenced by exemplars' personal impact on the nominators, painful life experiences, valuing helping others, being sought out for counsel, the validation of peers, and remaining in contact with their own experience.

*Semi-structured interviews.* Three core themes were uncovered through analysis in the semi-structured interviews about exemplars lives. First, exemplars reported deeply meaningful encounters and intimate connections with mentors and loved ones. Second, spirituality is important, as reflected in exemplars' beliefs and practices, including the unity of spirituality and life, practicing meditation, attending retreats, and having access to a reflective articulation process. Finally, exemplars are guides for others and have an impactful presence as luminaries, transformational catalysts, and teachers with specific means of sharing with others.

#### *Exemplars' Opinions of Wisdom*

Exemplars defined wisdom as arising from the unknown and as practical. They offered multiple strategies for the cultivation of wisdom-related processes, primarily the relationship with a mentor, although there was disagreement about whether wisdom itself was teachable. Some examples of wise behavior included connecting with another human being, restraining action, and making an important life decision without knowing why. Exemplars thought that people are wise about different things and nominated predominantly spiritual and religious figures as wise.

### *Section 2: Confirmatory Hypotheses*

Confirmatory hypotheses are related to assessing exemplar's wisdom-related qualities and characteristics. They will be concisely interpreted and discussed throughout the study in relationship to the exploratory research.

#### *Hypothesis 1*

Exemplars' average score on the Self-Assessed Wisdom Scale would exceed the cutoff score considered to be wise, 201.6. The findings support the first hypothesis that exemplars would exceed the cutoff score considered to be wise.

One explanation for this finding was that wisdom, as defined by the SAWS factors, seemed to resonate with a majority of exemplars. Internal validity for the SAWS averaged .828 as scale factors correlated positively and significantly with the overall score. Exploratory findings supported the SAWS dimensions on the whole, and will be discussed later in the chapter.

It was also significant that nearly twice the percentage of exemplars (55%) scored wisely in the present study than participants in the normative SAWS study 25.9% (Webster, 2003). That 55% of exemplars achieved the wise score of 84.4% (201.6) was also significant compared to the study most similar, in which the highest scores were only 51% of the total possible wisdom score (Lyster, 1996). Exemplars were, on average, older and significantly more educated than either comparison sample; however, education and age in the present study were not significantly correlated with any self-report measures. Lyster (1996) also adapted the Berlin scoring protocol and measured different dimensions of wisdom than the SAWS, meaning that drawing conclusions based on a comparison of wise scores might be invalid.

Notably, the Self-Assessed Wisdom Scale was one of the only wisdom conceptions to include humor, which was the most correlated SAWS factor with the composite SAWS score. This means that exemplars related humor more with wisdom than any other SAWS dimensions. Humor and lightness were also significant personal qualities analyzed in the exemplar interviews.

Webster (2007) cites Damon (2000), Erikson (1963), Frecknall (1994), Taranto (1989), and Vaillant (2000) in conceptualizing humor as the rare ability in wise persons to reflect fearlessly on the strange institutions and customs man uses to find self-realization. The wise person is able to use humor for irony, social bonding, stress



reduction, and as a reminder to not take themselves too seriously. Webster contends that it provides an emotional anecdote to the subjective distress of critical life events and reinforces openness.

One example of exemplars' sense of humor was Exemplar 14 opening the door to his home for the study interview wearing a purple wizard's hat, and smiling:

I'm amused that you were amused by my robe and staff and my wizard's hat. That's a pleasure. I like to be able to see what the future is. The crystal ball is always at hand. I should have been carrying a crystal ball. Oh, why didn't I think of that? [laughter].  
(EX 14)

### *Hypothesis 2*

Exemplars' average scores on the Loyola Generativity Scale (LGS), Mindful Attention Awareness Scale (MAAS), Satisfaction With Life Scale (SWLS), Big Five Inventory (BFI) Openness to Experience, and Spiritual Perspective Scale (SPS) would exceed the normative mean scores for each measure by at least 10%. The findings support the second hypothesis that exemplars average scores on the LGS, MAAS, BFI, SWS, and SPS would exceed the mean normative scores of each measure by 10%.

On average, 86% of exemplars exceeded comparative mean norm scores by an average of 13.4 %. This finding suggests that generativity, mindfulness, openness, satisfaction with life, and spirituality were more present qualities in the majority of exemplars than the norm. The exemplar sample, however, was far from normative, as exemplars were older and more educated than the normative samples for all comparative measures, weakening the findings.

The BFI Openness to experience result was most expected, as openness is considered a prerequisite for wisdom (Lyster, 1996). Exemplars' scores on the Mindful Attention Awareness Scale (MAAS) and Spiritual Perspective Scale (SPS), although expected, were newer explorations into wisdom that will be expanded on in light of the exploratory findings.

That exemplars scored nearly 20% higher than the norm on the Satisfaction with Life Scale (SWLS) could have been attributed to many things: loving relationships with mentors, spouses, and friends; a tolerance of uncertainty, profound spiritual connections, a sense meaning and purpose, high harmoniousness scores, high levels of education, socioeconomic stability, believing their lives have been impactful, being physically healthy, profound gratitude and appreciation, low perceived stress, little to no state or trait anxiety, and a high capacity for emotional regulation. Exemplars' highest scoring item was, "So far I have got the important things I want in life."

Seventy-five percent of exemplars showed above-average generativity on the LGS. This finding is not surprising, and will be further interpreted in relationship to the explorative findings. Specifically, generativity will be related to the importance of mentoring, exemplars' professions oriented to the human condition, high prevalence of exemplars' spiritual and religious traditions, and exemplars' definitions of practical wisdom.

### *Hypothesis 3*

Exemplars' average scores on the State Trait Anxiety Inventory (STAI), Perceived Stress Scale (PSS-10), and Narcissistic Personality Inventory (NPI-16) would fall below the mean normative scores of each measure by at least 10%. State Trait Anxiety Inventory (STAI) and Perceived Stress Scale (PSS-10) fell below the mean normative scores of each measure by at least 10%, consistent with the prediction. Exemplars' average scores on the Narcissistic Personality Inventory (NPI-16) and STAI Trait-Anxiety did not fall below the mean normative scores of each measure by at least 10%, inconsistent with the prediction. The STAI, PSS-10, and NPI-16 were all new ventures into wisdom-related research.

Despite exemplars scoring, on average, 8.8% below the norm in Trait Anxiety, which was inconsistent with the prediction of 10%, exemplars rated themselves with almost no state or trait anxiety. State-Anxiety and Trait-Anxiety scores of 20 indicate no measurable anxiety or a desire to “fake good” (Spielberger, 1983, p. 6). Anxiety prone participants, though, could have self-selected themselves out of the study. The STAI was also designed for clinical levels of anxiety, not subtle measurement of a high functioning group. Relatively, the item reflective of the most anxiousness for exemplars on the State-Anxiety scale was, “I feel strained,” which was likely related to their completing the researcher’s measure. Many exemplars noted that the overall survey was strenuous and too long.

Perhaps one significant outcome of exemplars’ low state and trait anxiety was their openness to themselves and others, a critical part of their intimate relationships. According to Ardel (2000a), the emotional dimension of wisdom involves a complex blend of the range of human affect and an exquisite sensitivity to subtle nuances and gross distinctions. Webster (2007) writes, “Recognizing, embracing, and employing emotions in a constructive and creative way is a benchmark of wisdom” (p. 166).

Exemplars’ high mindfulness scores combined with low state and trait anxiety might suggest that exemplars can be present with anxiety as it arises. Exemplars may still experience anxiety, but not be anxious about being anxious. Perhaps this is why anxiousness was not significantly negatively correlated with the overall SAWS wisdom score.

The Perceived Stress Scale (PSS-10) is one of the few instruments that sought to measure both the degree to which life events are perceived as stressful as well measure stress as a result of recent daily experiences (Treadgold, 1999). Exemplars having both a low perception of stress and low stress related to recent daily experiences could be related to their tolerance of

uncertainty, especially when perceived stress is defined by the PSS-10 as unpredictable, uncontrollable, and overloading. Exemplars also responded most highly, or *never to almost never* to this item: “In the last month, have often have you been upset about something that happened unexpectedly?”

Exemplars’ higher than normative scores on openness to experience, valuation of tolerating uncertainty, and lower than normative state and trait anxiety scores would all also seem to be related to not perceiving life stressfully. Exemplars lowest scoring item on the PSS-10, responding *never to almost never*, was: “In the last month, how often have you felt nervous or stressed?” Professional expertise and training in professions oriented to the human condition likely contributed to exemplars’ low perceived stress scores.

Exemplars higher than average scores on the NPI-16 were unexpected. Narcissism was defined as “an important complex of personality traits and processes that involve a grandiose yet fragile sense of self and entitlement as well as a preoccupation with success and demands for admiration” (Ames et al., 2006, p. 441).

Exemplars scored highest on the NPI-16 stem, “I am an extraordinary person,” which might be related to their self-esteem rather than thinking themselves better than another person. There *did* seem to be something extra-ordinary about each exemplar, but not because it seemed like they were trying to get recognition. Exemplars relatively disagreed most with the Humility Inventory statement “I feel slighted when I don’t get the attention that I should,” and scored lowest on the Humility Inventory subscale Need for Recognition.

Many exemplars commented that the NPI-16 was troublesome to complete, explicitly stating that “neither forced choice really seemed to reflect what was true for me” (EX 11). The NPI-16 required exemplars to choose between two statements that were supposed to describe

their feelings and beliefs about themselves, picking one, even if neither statement described them well.

#### *Hypothesis 4*

Exemplars' average score on the WUSCT would exceed the highest conventional stage of adult development, the Achiever, 4.0. Exemplars average score on the WUSCT was 4.2. This finding means that exemplars average score technically exceeded the Achiever stage of adult development, consistent with the prediction.

The professional scorer, Terri O' Fallon, was uniquely qualified for this study because of her personal interest and ongoing research in late stage development, specifically the late-fifth person perspective (5/6) and the late-sixth person perspective (6+). When the researcher mentioned surprise at exemplars' predominantly conventional scores (60%), she replied:

At first when I was doing the scoring, I was also so struck by this and didn't want to believe the scores I was getting. I did inter-rater reliability scoring with other people and they just didn't turn out very late for any of us. (T. O' Fallon, personal communication, December 4, 2009)

Cook-Greuter (1985) points out that highly developed individuals may score lower than their level of development. This problem stems from the fact that what Cook-Greuter calls the post conventional stages, 5-6, are post linguistic, while the WUSCT is based on language. This means that the WUSCT, effectively, is trying to evaluate the presence of higher-developmental stages with methods—those being language and writing—that are more commonly associated with lower-level developmental stages. To this point, O' Fallon writes “People at these later two levels not only need an abundance of responses, but they also need to have a variety of responses to different categories. It is very complex” (personal communication, December 4, 2009).

Reviewing exemplar scores on the STAI, which preceded the WUSCT, exemplars were already “feeling strained,” their highest State-Anxiety score, and “unrested,” their highest Trait-

Anxiety score. It is possible, therefore, that they did not say enough to score higher on the WUSCT due to feeling strained and tired, or tended to conceal their levels of development by giving short, simple answers to save time and energy. Comments from several exemplars at the end of the survey offered support to this perspective. However, O' Fallon reflects, "We cannot guess what people mean . . . they have to delineate what they mean" (personal communication, December 4, 2009). More will be said about exemplars' development throughout the chapter.

### *Hypothesis 5*

There would be statistically significant ( $p = .05$ ) positive correlations between the Self-Assessed Wisdom Scale (SAWS) and: BFI Openness to Experience, Spiritual Perspective Scale (SPS), Mindful Attention Awareness Scale (MAAS), Humility Inventory (HI) and Loyola Generativity Scale (LGS). There were found to be statistically significant positive correlations between the Self-Assessed Wisdom Scale (SAWS) and: BFI Openness to Experience, Spiritual Perspective Scale (SPS), and Humility Inventory (HI), consistent with the prediction. There were found to be positive, but not significant correlations between the Self-Assessed Wisdom Scale (SAWS) and: Mindful Attention Awareness Scale (MAAS) and Loyola Generativity Scale (LGS), inconsistent with prediction. These results suggest that higher levels of wisdom were correlated with increases in openness, humility, and the importance of spirituality.

BFI Openness to Experience being the most positively and significantly correlated variable with the SAWS composite score was the most expected finding in this hypothesis. More will be said about the importance and relevance of openness to experience in relation to the exploratory research.

The Humility Inventory (HI) was the third most positively and significantly correlated variable with wisdom (SAWS). Seventy-five percent of exemplars *agreed to strongly agreed*

with scale items as self-descriptive, and 25% of exemplars showed *neutral to agreement* with the scale items as self-descriptive. Some prudence is justified, however, in interpreting results, as the Humility Inventory is untested in other psychological research. Humility was found to be important in the study of Levitt (1999).

Emmons (1999) suggests that humility involves accuracy, self-acceptance, keeping one's talents and accomplishments in perspective, understanding one's imperfections, and freedom from both low self-esteem and arrogance. In her list of key features of humility, Tangney (2000, 2002) includes an accurate sense of one's abilities and achievements, the ability to acknowledge one's mistakes, gaps in knowledge, imperfections, and limitations (often with reference to a Higher Power), openness to new ideas, contradictory information, and advice, and an ability to keep one's abilities and accomplishments in perspective. According to Landrum (2002), humility involves a willingness to admit mistakes, seeking advice with an open-minded attitude, and having a desire to learn.

Considering the spiritual practices and religious traditions of exemplars, humility could be deeply valued by exemplars. Humility is not humiliation, but profound confession, particularly when combined with exemplars' valuation of truth telling.

Perhaps humility combined with exemplars' higher than normative openness to experience promoted their abilities to let others and life in. Exemplars' high resonance with the Humility Inventory combined with lower than normative state and trait anxiety could have contributed to exemplars being contacted and affected by others. Perhaps humility embodied or internalized by exemplars was reflected in their deep gratitude and appreciation, and humility externalized was their compassionate truth telling.

Humility as the longing to be no more and no less than one is also seems to fit for exemplars, and could be related to their higher than normative scores on narcissism (NPI-16). This means that humility could include exemplars' awareness of the positive ways in which they see themselves in the world, and in relationship to others.

Ninety percent of exemplars showed above average mindfulness, yet the MAAS was correlated positively, but not significantly, with the SAWS. More will be said about the MAAS and its relationship to wisdom throughout the chapter.

### *Section 3: Exploratory Research: Are Exemplars Wise?*

#### *Profession*

The greatest predictive factor for wisdom in previous psychological wisdom-related research has been found to be a profession in fields such as clinical psychology and pastoral and ministerial counseling (Trowbridge, 2005). Baltes et al. (1995) spoke of the wisdom enhancement effect of professions oriented toward the human condition, and Baltes and Smith (1998) found the greatest predictor of wisdom to be within the field oriented to the human condition, particularly advisory professions of ministry, mental health, and education.

Exemplars' professions were predominantly oriented towards the human condition, and most were advisory professions. Writers, psychotherapists, spiritual professions, and educators accounted for nearly all of exemplar professions, and many exemplars have careers in multiple professions oriented towards the human condition. This finding means that exemplar professions are resonant with the findings of previous research.

Another consideration regarding exemplar validity is the effect of exemplars' wisdom-enhancing professions throughout their lives—the “age-by-experience criteria” (Baltes & Staudinger, 1993, p. 7). Having had greater exposure to “wisdom-facilitative” experiences over



time than the average person, exemplars—like nominators—are thought to be more capable of articulating the nature of their wisdom and identifying it in others (Trowbridge, 2005).

This association is not a correlation of exemplar wisdom and age, which was found, consistent with previous research, to be unrelated (Baltes et al., 1995; Smith & Baltes, 1990; Smith, Staudinger, & Baltes, 1994; Staudinger et al., 1998; Staudinger et al., 1992; Webster, 2003, 2007), but rather that exemplars are thought to have had more engagement with wisdom-related contexts and experiences than younger people in professions unrelated to the human condition. Seventy-five percent of exemplars were between the ages of 64 to 85 years old, 45% between 65 to 74 years old, and 30% between 75 to 84 years old.

The age-by-experience reflection regarding exemplars is made more significant by the finding that exemplars had deeply impactful relationships with mentors, the most-cited exemplar criteria for learning wisdom-related material. Moreover, exemplars themselves offered many tools for wisdom-related acquisitions. Learning to surrender, “decentering” from the thinking mind, and learning from experience were all practices that were potentially implemented across their lifetimes. Like Robins (1998), the point here might be that wisdom-related processes, if practiced earlier in life—either intentionally, or as part of a career related to the human condition—could enhance the potential development of, and access to, wisdom. More will be said about this later in the chapter.

Exemplars’ professional training and work, spiritual aptitude, and being nominated as wise is also significant, because the empirical wisdom-related literature of the past 35 years has studied these qualities in separate populations, but never together: spiritual development and ordination (e.g., Levitt, 1999), wise nominees (Baltes et al., 1995), and professions oriented to the human condition (Montgomery, Barber, & McKee, 2002).

### *Nominator Considerations*

Regarding the nomination process and its relationship to exemplars' purported wisdom, nominators have known exemplars on average 25 years in multiple contexts, most often having exemplars as their colleagues and teachers. Nominators, having known exemplars for decades in teaching-type relationships—while working wisdom-enhancing professions themselves—seems to add credence to nominators' wisdom-related capacities to know something about what wisdom is, and is consistent with other study findings regarding the importance of mentoring-related relationships for wisdom-related acquisitions (Baltes & Staudinger, 2000; Levitt, 1999; Montgomery, Barber, & Mckee, 2002). At the very least, nominators would seem to have had, on average, ample time to make an educated appraisal of exemplars throughout the course of their relationship.

Nonetheless, nominators having had exemplars as teachers, colleagues, and mentors could potentially contribute to nominator inability to accurately judge. It seems unlikely though, that exemplars would need their mentees, students, and colleagues to think highly of them, as exemplars scored highly on humility, mindfulness, and generativity, although their narcissism scores were higher than the norm. Perhaps exemplars' qualities of humility, generativity, and mindfulness were not reflective of their development 25 years ago, meaning that they might have needed the affirmation of their mentees and students. Overall, nominators have described exemplars as honest, open, compassionate, integrated, understanding, and spiritual, and it seems more likely that nominators felt the significant impact of exemplars in their lives:

I feel valued and respected and indeed loved by him. I have been inspired by him to live my life more fully and with more aliveness. He helped me to see myself through his loving, accepting eyes. (N 12)

Still, nominators could have chosen exemplars for reasons of professional affiliation or convenience, having had preexisting relationships in these worlds.

Regarding descriptive exemplar qualities rated by nominators on the Foundational Value Scale (FVS), intelligence was the most highly rated exemplar quality. Perhaps nominators appraised exemplars as predominantly intelligent rather than wise. One explanation for this finding could be that nominators themselves valued intelligence, as, on average, they were more educated than exemplars. Maybe the educational contexts in which they know exemplars made them particularly adept at assessing for intelligence.

Meaning in life was the second-highest-rated quality chosen by nominators to describe exemplars. Perhaps the importance of intelligence and extensive exemplar education reflected exemplars' investment in and resonance with what is meaningful to them, rather than just cognitive capacity:

And so that kind of set the whole direction for my whole professional life for the next 20 years. Which was really a blessing that I was in a school where I could do that, because otherwise I don't think I could have focused on anything else. And it would have really split me. It would have divided me. But it just carried me. And that really impacted my life greatly. I started an organization and I wrote a book and did a lot of things related. (EX 9)

The psychological wisdom literature generally treats intelligence as necessary, but not sufficient, for wisdom (Ardelt, 2000a; Baltes et al., 1995; Stenberg, 1998). While exemplars' education is not necessarily reflective of their degree of intelligence, it is notable that education was not significantly correlated with other self-report measures. Perhaps the high score of intelligence was reflective of rich factual and procedural knowledge mentioned in the Max Planck wisdom conception (Baltes & Staudinger, 2000).

### *Openness to Experience*

A significant finding in the study was that openness to experience, as measured by the Big Five Inventory (BFI), was an important variable in the qualities and lives of exemplars. According to Kramer (2000), "Openness to experience is the most frequent predictor of wisdom"

(p. 83). Openness to experience was found to be significant in the findings of Lyster (1996), Staudinger et al. (1997) and Staudinger et al. (1998) as well.

BFI openness to experience was the most highly positively correlated variable with the overall exemplar wisdom score on the SAWS. Both the positive correlation to wisdom and the high openness scoring in relationship to the norm are significant because the BFI is thought to measure enduring personality traits in exemplars.

Present study findings regarding openness might have increased validity as the BFI, Openness to Experience, and the SAWS, Openness, were also significantly and positively correlated to each other and to the composite wisdom score (SAWS). Openness results also came from multiple sources: higher than normative exemplar scores on BFI openness to experience, descriptive nominator narratives, and significant positive correlations between openness to experience (BFI) and wisdom (SAWS). Thus, exemplar findings regarding openness resonate with a significant pattern in previous wisdom-related psychological literature: that openness to experience is an essential variable related to wisdom.

#### *Exemplars' Wisdom and the Self-Assessed Wisdom Scale (SAWS)*

The SAWS was employed to measure (personal) wisdom in exemplars. It was developed by Webster (2003, 2007) who put forward a multidimensional wisdom construct defined as “the *competence* in, *intention* to, and *application* of, *critical* life experiences to facilitate the *optimal* development of *self* and *others*” (2007, p. 164). Dimensions of wise persons include openness, the ability to regulate emotions, having a sense of humor, an ability to metabolize critical life experiences, and a capacity to be reflective.

Comparing the five SAWS factors to exemplar study results, the importance of openness in relationship to wisdom was supported, as evidenced by the higher than normal BFI scores and

the positive and significant correlation of the BFI to the overall SAWS wisdom score. Emotional regulation was positively and significantly correlated with other wisdom-related measures, as well as the overall wisdom score. Humor and lightness was a predominant theme in the exemplar semi-structured interviews, as well as being the most positively and significantly correlated SAWS factor to wisdom. Self-reflection, self-contact, and awareness was important as reflected in interview themes and higher than normative mindfulness scores. Exemplars also valued, and facilitated, reflective self-and-other-development, as evidenced by their roles as mentors, educators, counselors, therapists, and spiritual teachers, as well as reflected by their higher than normative generativity scores.

Exemplars' metabolizing of critical life experience was spoken about in two places: the nominator narratives about exemplars and in exemplar definitions of what relates to developing wisdom. Critical life experience could have been explored more intentionally in the exemplar semi-structured interviews, as what was written by nominators was rich with potential wisdom-related meaning. With this exception, the SAWS dimensions seem to be supported by the quantitative and qualitative exemplar findings.

The fact that the SAWS was self-assessed, with no measure of social desirability in the study, weakens the findings, as exemplars could have been exaggerating their self appraisal. However, mindfulness, humility, and telling the truth were highly valued qualities in the lives of exemplars, meaning it is reasonable to think they answered with some integrity and accuracy.

Perhaps, though, the high frequency of wise scoring exemplars means just that: they scored highly on whatever the SAWS measures. Empirical wisdom research experts Staudinger et al. (2005) write: "The convergent validity data indicate that the SAWS scale seems to measure something like personal wisdom" (p. 212), but the SAWS may have little to do with wisdom. It

is likely the SAWS reflects part of the methodologically well-lit path of wisdom mentioned by Robins (1998), as its five overlapping dimensions stemmed from Webster's (2003, 2007) review of the psychological wisdom-related literature.

Overall, previous research related to assessing exemplars' purported wisdom—namely, professions oriented towards the human condition and the importance of openness to experience—resonate with present study findings. Additionally, exemplar nominators, on average, had longstanding, mentor-type relationships with exemplars, offering increasing validity to their assessments beyond just their converging professions oriented to the human condition. Average exemplar scores on the SAWS exceeded the cutoff considered wise, and a higher percentage of exemplars scored wisely than in previous similar studies. Exemplars' gender, education, and age were also not significantly correlated with any measures.

While none of these findings are conclusive that exemplars are wise, it seems reasonable to deduce that their opinions, lives, and qualities might be more reflective of wisdom-related material than the average person. If we consider that nearly all previous studies regarding peoples' ideas of wisdom (implicit theories) are based on average persons' notions of wisdom (Trowbridge, 2008), support for exemplar validity is a potentially meaningful finding: “The ideas of people who may have never given a moment's thought to wisdom provide no help in understanding this most complex and rare ‘endpoint in the integrated development of knowledge and character’” (Trowbridge, 2011, p. 2, Staudinger 2008, p. 107).

#### *Section 4: Exploratory Research: Exemplars Lives and the Importance of Spirituality*

An explorative finding in exemplars lives was that spirituality was important. The importance of spirituality to exemplars was a relatively unusual finding in the psychological wisdom-related research, save for a few qualitative studies of spirituality (Helson & Srivasta,

2002; Le & Levenson, 2005; Le, 2008a; Wink & Dillon, 2003), and spiritually oriented people such as Buddhist monks (Levitt, 1999), Iranian Sufis (Ahmadi, 1998) and Native American Elders (Thomas, 1991). In general, spirituality is a less well-traversed domain in the psychological wisdom related research, and religious aspects of wisdom have been mainly ignored by psychologists (Trowbridge, 2005). Empirically, spirituality is almost non-existent in the literature, except for Jason et al. (2001) and Ardel (2003).

In the current study, the high prevalence of religious and spiritual traditions and practices reported by exemplars suggests the importance of spirituality in their lives. This does not mean, however, that exemplar spirituality is related to wisdom. Maybe nominators, all of whom reported spiritual lives and practices, valued spirituality, or valued spirituality in relationship to wisdom, and chose people they knew who were spiritual. The most highly rated nominator narrative regarding exemplars was spirituality, exemplified here:

She is a genuine spiritual seeker who not only speaks of spirituality but tries to live from her spiritual center on an ongoing basis. She is also mature psychologically and has attained sufficient spiritual realization to act from a truly transpersonal rather than only personal perspective. That is rare, even with all the current interest in “spirituality.” (N 8)

I have no doubt that God is increasingly at the center of her life . . . She has a deep and natural instinct for the spiritual in the midst of daily life. (N 13)

Assuming nominators’ assessments of exemplars are not projections, these statements offer some insight into what nominators mean about exemplars’ spiritual lives, beyond just a descriptive word on the FVS. These reflections also seem to support the intimate relationship which is thought to exist between nominators and exemplars mentioned earlier.

On the Foundational Value Scale (FVS), nominators rated spirituality as the second-highest factor and the fourth-highest quality of exemplars. Meaning in life was the second-highest-rated quality, which, depending on what spirituality actually means to exemplars, or

to nominators, could be resonant with Kramer's (1990) spiritual introspection: questioning life meaning, the nature of existence, and the contemplation and resolution of existential dilemmas (p. 288).

*Spiritual Perspective Scale.* On the Spiritual Perspective Scale (SPS), which is thought to measure the importance and salience of spirituality in one's life, exemplars scored 15.7% higher than the norm. "My spiritual views have had an important influence on my life" was their highest scoring stem. But the SPS was only 10 items, and seemed more oriented towards religion than to spirituality, employing stems like, "I frequently feel close to God or a "higher" power in prayer, during public worship, or at important moments in my daily life." Many exemplars had religious traditions and backgrounds, and about two thirds were Christian-related, so maybe scores were inflated because of this connection. Reed (1986, 1991) found that participants who have a religious background tend to score higher than those participants without a religious background.

The researcher adjusted the SPS scale weights, as was disclosed in the methods section, to allow the widest possible array of exemplar responses. Included was "more than" and "less than" to scale responses that arbitrarily named a specific number of spiritual practices per day, and "not applicable" to explicitly religious items. Maybe the SPS, or the adjustments that were made, altered what it really measures (its validity), or inflated or altered the scores.

Whatever the SPS measured, though, was positively and significantly correlated to the overall SAWS wisdom score. Critiques of the SAWS have been made extensively in Chapters 2, 3, and 5, and at best, it measures some wisdom-related dimensions. The SAWS wisdom-related dimensions, however, resonated with other exemplar findings, as was mentioned, and had a high degree of internal validity.



Overall, spirituality seems to be important to exemplars. This is a significant finding for at least two reasons: spiritual and religious concerns are essential for the serious treatment of wisdom (Trowbridge, 2009), and spirituality and religious considerations are absent from the vast majority of psychological wisdom research (Trowbridge, 2005).

*Exploratory Research: Exemplar Spiritual Perspectives*

*Spiritual Path*

An explorative question of exemplars lives was, “Is there a spiritual path that exemplars would recommend?” For several reasons, the answer was almost always no.

First, most exemplars felt they could not know, nor was it their place to know, what someone else needed spiritually without engaging them first:

I don't feel like I can know for someone else what they need to do to have an experience that they would call spiritual within themselves or in a relationship to something else, to existence. What's more true is that in my life as I have connected to what I experience in what we call spiritual, that people have shown up in my life who are struggling and searching, who in very unplanned, unintentional conversation we exchange information that then helps them find this within themselves. (EX 4)

Instead of advice giving, exemplars preferred active listening and responding, similar to the findings of Lyster (1996). Reflective questioning, seeing into others, and facilitating deep self-acceptance were ways exemplars described relating with others.

Second, exemplars would not recommend a specific spiritual or religious path because they felt no single tradition has exclusive claim on the Truth, but rather shared underlying values:

Different religions, different spiritual paths focus on a particular facet of the, of the jewel of crystal through which consciousness expresses itself in love, wisdom, compassion. (EX 16)

There's truth in all the different traditions. They take different forms and there are important differences between the different traditions, but at the esoteric level, the innermost secret level, they all have certain values. For example, the golden rule is one of them, love is another one that is embedded in there in all the traditions. Again, it's different doorways, different doorways into a connection with the divine, with the great

mystery, with the experience of all that—of who and what we are. So it's kind of a really —to appreciate every tradition has, gives us a map or a pathway if we're willing to go deep. (EX 10)

Spiritual introspection, an aspect of Kramer's (2000) wisdom model, is reflective of exemplars previously stated spiritual views:

An acknowledgement of the validity of plurality of contexts for religious worship and beliefs for oneself and others; and meeting others with considerations of cultural, religious, and developmental differences when relating and advising (Kramer, 2000, p. 49).

Reasons for exemplars' religious and spiritual plurality could be their extensive religious and spiritual educations and professional lives oriented towards being with others. The two highest single-item scores on the SAWS wisdom measure were "I've learned valuable life lessons from others," and "I have dealt with a great many different kinds of people during my lifetime." Openness to experience as a personality trait, humility, and the capacity to take multiple perspectives seems relevant and possibly related, too. All these qualities were positively and significantly correlated with wisdom.

Overall, exemplars' spiritual perspectives, if added to the current religious disagreements of our world, could be impactful, especially if adopted and translated developmentally and culturally. Said most simply:

1. Listen to others first instead of giving advice.
2. Ask reflective questions.
3. Consider that truth exists in multiple worldviews.
4. Assume there is a shared underlying truth.

Trowbridge (2008) writes, "God knows more practical wisdom among humans and their institutions is perhaps the greatest need today, if our world is to avert catastrophe and flourish as it can" (p. 47).

*Spiritual Perspective: Oneness, Being a Part of the Whole of Life, Being a Part of Larger Creation*

A third spiritual perspective found to be important in the lives of nearly two thirds of exemplars, was an insight into, or an abiding recognition of, being a part of the whole of life, being a part of larger creation, or both:

I just went into another whole level of recognition of my true nature I guess you would say. And it was like consciousness simply letting go of everything I am. And merging with everything that is. And I don't know. It was like a recognition of truth that I couldn't possibly ever deny again. (EX 9)

What was striking about it was the understanding of the selfless nature of everything. The limitation of how we usually think of a sense of self as being the particular body we inhabit, you know, and being limited to that frame. That boundary fell away just afterwards. And it was just, there was more a, just a totality of experience rather than any one part of it being me. (EX 15)

And finally it snapped you know . . . there isn't a spiritual and something else . . . It's the all of everything, nothing is left out. (EX 6)

Interestingly, the recognition of being part of larger creation was not just reflective of a small contingent of exemplars with Eastern religious and spiritual pedigree. Exemplars with Christian traditions and practices spoke similarly:

If I have to articulate an image of God these days it's simply life. Yeah, simply life. And that life itself has its own way of being. And it is that way of being of our life that is the sacred ground. And we don't have to symbolize or image it in any other way to define it. (EX 11)

The idea is that we really are part of this universe . . . And so you come to understand that our connectedness, that we are all, and all we are . . . is energy. I mean, that's enough, but that's what we are. (EX 5)

Each of the above exemplars is an ordained spiritual teacher, so they could just be expressing beliefs or ideas associated with their traditions. An argument could also be made that exemplars' spiritual appointments add credence to their words. Levitt (1999) found consistently religious perspectives in her study of Buddhist monks, as did Ahmadi (1998, 2000) in her study

of Sufis, which makes sense. Certainly, spiritual and religious perspectives are useful but they could be garnered from many sources, including sacred texts. Of more relevance is, were exemplars' words reflective of their lived reality, if only for a moment?

An honest assessment of exemplars' experiences of unity would likely require one's own capacity to see what is seen by exemplars. While the researcher makes no claims to a shared worldview, sitting and listening to exemplars offer their spiritual views felt like not just words and concepts but their own inner experiences. And being in their presence, for the most part, was opening in ways that were inspiring, motivating, and emotionally moving.

Obviously, the researcher's self-report does not validate exemplars' inner subjective life, nor does any of the measures in the study explicitly reflect it. Exemplars did score highly on humility and value truth telling; however. Le (2008a) also found that transcendent wisdom develops later in life than practical wisdom—and—developing transcendent wisdom later in life overlaps with exemplars average age, nearly 70. The significance of exemplars' spiritual insight warranted considering validity, because, if true, exemplars' recognition of being a part of the whole of life expands their identity beyond just humanness to life, selflessness, energy, true nature, and the all of everything.

The significance of identifying oneself as non-separate from life resonates with several wisdom conceptions. Mckee and Barber's (1999) notion of wisdom as "seeing through illusion" (p. 151) comes to mind, as does wisdom as insight based into the meaning of life (e.g., Ardel, 2000a; Kekes, 1995). Achenbaum (2004) writes: "the wise, utilizing their abilities to look upon the universe from several planes, seek insights about how their true nature evolves within themselves" (p. 46). Wisdom as "profound insight into reality" seems possible (Trowbridge, 2007, *Cultivating a Wisdom Perspective*, para. 3). The transcendent wisdom notion of Le

(2008b) also might apply: attainment of insight into reality. From Levitt's (1999) study of Buddhist monks: "Learning the true nature of reality is both a final goal and part of developing wisdom" (p. 104). Ahmadi (1998) points out that in her study of Sufis, the individual self is not in fact separated from other than self. Trowbridge's (2008) reference to the wisdom of the sages: To truly know yourself is to know all things. The point is, being one with all of creation is significant because it might be related to Sophia, "which is knowledge first of things, ultimate explanations and what follows from them, particularly in regard to human fulfillment" (Trowbridge, 2008, p. 44). Recognizing the communion of all life would certainly seem to be related to what follows regarding human fulfillment.

Multiple findings could possibly be related to exemplars' insight of being a part of all of creation. First, the high prevalence of the importance of spirituality in exemplars' lives—over their lifetime and as evidenced by the Spiritual Perspective Scale (SPS) scores and self-reports—seems relevant. Wink and Dillon (2003), who studied spirituality and wisdom across the lifespan, found that the association between spirituality and wisdom means that "highly spiritual individuals display a complex way of thinking and possess insight into the human condition" (p. 922). Le (2008b) postulated a connection between "mystical experiences and transcendent wisdom among adults" (p.402). Helson and Srivasta (2002) found that a career in spirituality added significantly to the prediction of wisdom.

Terri O' Fallon, expert WUSCT scorer, also commented on a connection between exemplars spiritual development, personal development, and wisdom:

Many people have a wonderful spiritual life that makes them very, very wise, but it doesn't mean that they are late developmentally. I have scored people that many have assumed were later level in their development and they tended mostly to be late in their state stages.

For example, they may not be able to see a long way out in time, or have a wide universal space field they live in. They may not be able to see general systems, and they

may not be able to see certain aspects of polar opposites. They may not be able to see the construction of reality, or certain kinds of projections in the moment. None of these things are needed to be seen as very wise.

I realized that development has little to do with intelligence and for the most part, wisdom. So I had to have a meaning-making scheme that helped me understand this, and developed this model:

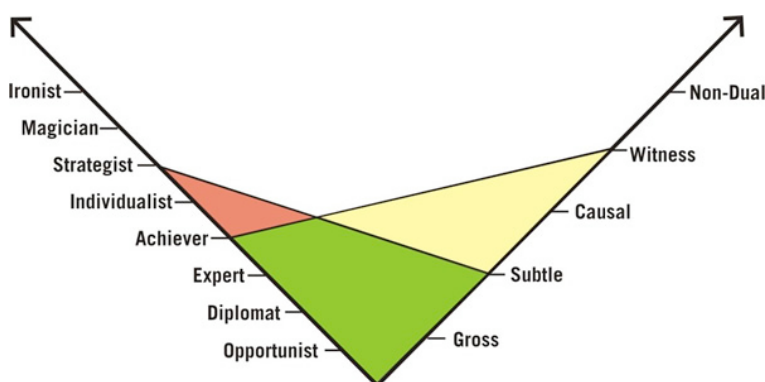


Figure 1. O'Fallon developmental model.

On the right side is the state stages in this V. On the left side are the developmental stages which I scored for you. If you draw a line from the developmental stage someone scores at, to the state (spiritual wisdom) stage they embody you can see that you can have an Achiever that has a triangular space (I call it “consciousness room to roam”) that is actually larger than the developmentally later Strategist, who has less wisdom!

I ran into this a number of times in the teaching I have been doing. Some people were incredibly wise even though they didn't have some of the developmental capacities of a later level. In this case, the Achiever has a yellow space to roam in that the Strategist doesn't have and the Strategist has the red space to roam in that the Achiever doesn't have.

(Ego) development doesn't necessarily measure wisdom. At the very latest stages wisdom does occur because you can't get there without later states but this isn't true for most levels. I hope this helps to explain the meaning I have made of this.

O' Fallon (See Figure 1) seems to be suggesting that state spiritual development eclipses personal development when it comes to accessing wisdom, but what about expressing wisdom? Perhaps wisdom comes through (permeates) the state side of development and is implemented through, or in, the context of the stage side of development, which might account for wisdom being defined by exemplars as from the unknown and yet practical. Perhaps this perspective could also account for varying expressions of “developmental” wisdom, although the source

from which wisdom arose was the same and was applied to the same context. In essence, individuals have wisdom, but they are not wisdom, and thus wisdom is theorized to develop through multiple constrained pathways that work together synergistically (Baltes & Staudinger, 2000).

O' Fallon's thinking that personal development is not necessarily related to wisdom is also congruent with the finding that exemplars are wise in different ways, and that their particular personalities are not shed completely for wisdom to be present. Nor are exemplars' relative life experiences and knowledge:

I think of exemplars of wisdom, I think that they're a variety of different personalities that can be wise. And the other thing is I think people may be wise in different ways in different areas. Some people can be very wise in one area and not so wise in other areas. I don't expect that somebody, just because they're a teacher, for example, spiritual teacher, they may have a lot of wisdom in one area and none at all in other areas. And I think that that can be so disillusioning when somebody puts a teacher up on a pedestal and then they turn out to be less than perfect. And they always do, because we're all just human. So I wouldn't hang it on any particular quality except the sense of caring and respect. (EX 10)

And yet exemplars said:

When wisdom is being spoken, it's egoless, or wisdom is being demonstrated, there's nobody there intruding, in that sense. But there is a way somehow—and it may be different moment to moment. But I think when it shows up that there's a feeling. There's a sense of presence that something bigger than what's human is on board and it needs to be honored or listened to, or be servants to that. (EX 6)

Of relevance is what Levitt (1999) highlighted in her study as the main difference between the Tibetan Buddhist process of self development and Western psychotherapeutic practices: the one puts forth the unreality of the individual self, and the other seeks a deeper understanding of this individual self—"Ego abandonment and ego strengthening" (p. 102). Trowbridge (2008) points out that Levitt (1999) suggests that psychotherapy and Buddhist philosophy "may be methods, grounded in the metaphysics of their cultures, to develop wisdom" (1999, p. 103).

In the psychological wisdom literature, ego strengthening and ego abandonment is generally separated as self-development and self-transcendence, respectively (Ardelt, 2003; Le, 2008b). Less spoken about, however, is the possibility of developing awareness of a self, conditioned or otherwise, that can then possibly be transcended.

One of the only theoretical and practical wisdom conceptions to consider a connection between developing a self and transcending the self is Robins (1998):

Wisdom is related not just to the expectations, beliefs and the consequent emotional reactions resulting from beliefs, but also to the cognitive, behavioral, physiological, interpersonal, familial and social components that originate from and contribute to beliefs, all of which intimately and dynamically interact and thus co-evolve together across our adult development. In addition to the development and treatment of the ego, and consistent with Buddhist Psychology (Epstein, 1995), Wisdom Therapy simultaneously aims to facilitate the transcendence of the ego. (Wisdom Therapy Institute, Goals, para. 1)

Importantly, a high percentage of exemplars in this study have Western psychotherapeutic training and experience, which is often concerned with self and other development. Many exemplars also have longstanding Eastern spiritual traditions and practices, often associated with self-transcendence. The relationship between self-awareness and self-transcendence is significant for many reasons, and will be explored briefly before returning to exemplars' relationship to larger creation.

#### *Self-Awareness and Self-Transcendence*

In the psychological wisdom-related literature, developing a capacity for self-awareness and self transcendence related to the reflective component of Ardel's (2004a) model of wisdom: self-awareness, self-insight, self-examination, and the capacity to take multiple perspectives of phenomena (Ardelt, 2004a). Ardel contends this self-reflection practice informs an undistorted comprehension of reality by facilitating an awareness and transcendence of one's projections and subjectivity.



Le (2008a) also spoke of wisdom as transcending the biases, subjectivity, and self-centeredness that are natural and pervasive in humans. She contends that wisdom is a developmental process that involves self-transcendence.

There are multiple findings in this study that relate to exemplars self-awareness and self-transcending capacities.

*Mindful Attention Awareness Scale (MAAS).* Exemplars' higher than normative mindfulness scores on the MAAS are supportive of self-awareness and self-transcendence. The MAAS assesses a core characteristic of dispositional mindfulness—namely, open or receptive awareness of and attention to what is taking place in the present. Kabat-Zinn (1990) claimed this kind of attention nurtures greater awareness, clarity, and acceptance of present-moment reality. This finding is significant for two reasons. First, it suggests exemplars strong valuation of receptive awareness to what is taking place in the present moment. And second, it seems that attending to what is actually happening in the present moment would precede the capacity to respond intimately to it, or to transcend it.

On the MAAS, however, high scores offer little insight into exemplars' subjectivity, especially because the stems are negatively worded. Mindfulness also has not been studied in the psychological wisdom-related research, so a degree of reservation in the researcher's meaning making is prudent.

*Valuation of self-awareness and self-contact.* Another finding supporting self-awareness and self-transcending capacities is exemplars' valuation of self-awareness and self-contact. Sixty percent of exemplars reported tracking sensations, creating spaciousness around emotions, witnessing thoughts, and staying in touch with moment-to-moment arisings. This finding offers

insight into exemplars' subjective notions of mindfulness, mentioned earlier, and is thought to contribute to a clearer view of subjectivity and the minimization of projection:

Well, I think it's the gradual strengthening of the faculty of awareness, you know, and self-awareness so that just over the years I've become kind of increasingly mindful of just the different patterns that are going on in my mind in thoughts and emotions. And through the seeing of them more clearly, it becomes easier to, at least a good part of the time, certainly not all the time, but a good part of the time, choosing to act on those that bring about well being and letting those go that seem to bring about suffering. So it all comes out of awareness and self-awareness. (EX 15)

I'm experiencing everything from the pressure of one leg on another, to a background feeling of pleasure, to pure awareness witnessing the same, witnessing it. And everything in between. It's interesting. I'm just watching the mental process of responding to this. It's like there's a boundless array of perspectives and possibilities. So it's a process of either selecting for any number of reasons one particular perspective or sitting back and allowing some aphoristic response, almost poetic response to attempt to encapsulate the many dimensions. (EX 16)

The other thing that's meaningful for me is just trying to stay in contact with what's happening to me. What am I experiencing? Kind of trying to refer back to that and check in with it. Then also just allowing myself time to process whatever's going on [pauses], and to try to give it some spaciousness [pauses], and see what's really going on. (EX 20)

*Self-observance.* A third finding supporting exemplars' self-awareness and self-transcending capacities is nominator descriptions of exemplars as self-observant. One example: "He is a keen observer of his own experience and his experience with others" (JE). However, this description is somewhat vague, and did not appear as frequently as spirituality or compassion to describe exemplars.

*Meditative practices.* A fourth related finding to exemplars' development of self-awareness and self-transcendence is the high prevalence and importance of exemplars' meditative practices. Twelve exemplars (60%) cited practicing various types of meditation, and within that group, eight practiced meditation for 25 years or more. Fifty percent of the total exemplar group also reported having multiple spiritual practices.

Without exemplars clearly defining what is meant by meditation, however, it is hard to speak uniformly to its effects. One exemplar said of meditation, “it increasingly gives you access to lots of inner processes, inner spiritual processes” (EX 11), while others commented on the value of meditation in their lives for focusing, as an awareness practice, and for emotional regulation. Other potential reasons for the high prevalence of meditation could be the age related overlap with a natural time of contemplation in life as well as exemplars’ religious and spiritual affiliations.

*Combined qualities.* A fifth finding potentially related to exemplars’ self-awareness and self-transcending capacities is their combined qualities of openness to experience, humility, and low state and trait anxiety. Recall that exemplars scored highly on openness to experience and humility, both of which were correlated significantly and positively with wisdom. Exemplars also scored lower than the norm on state and trait anxiety.

Openness to experience was defined, in part, as avoiding narrow-mindedness and self-deception (Webster, 2007). Humility was defined as a non-defensive willingness to see the self accurately, including strengths and limitations (Exline, 1999). The lowest-scoring item on the humility scale was, “I feel slighted when I don’t get the attention I should,” suggesting exemplars have some degree of freedom from other-oriented self-esteem, or at least value it. In relationship to others, exemplars’ freedom from needing to have their self-esteem enhanced by others is significant, as it allows the possibility of exemplars seeing beyond their own needs, and potentially being free to receive someone else.

Regarding state and trait anxiety, in situations where relationships are involved, self-esteem is challenged, or failure is experienced, people with high trait anxiety tend to react with higher levels of state anxiety. Implied in this previous reaction is that high trait-anxiety people

may have a fairly rigid internalized self-concept as compared to someone whose self-concept is supple/fluid enough to accommodate being inadequate, failing, or looking bad (Butlein, 2005). Perhaps exemplars' openness to experience, a humble, non-defensive willingness to see the self accurately, and low trait and state anxiety combined to allow a less guarded, more transparent or fluid self-concept, resulting in reduced self-centeredness and projection. The result is more presence and availability to themselves and others.

*Wisdom related strategies.* A sixth finding relating to exemplars' self-awareness and self-transcending capacities is exemplars' strategies, or technologies, for learning wisdom-related information. The third-most-reported theme for learning wisdom-related material, behind mentors and letting wisdom arise, was "decentering" attention from the thinking mind, suggesting a larger source than just the individual is responsible for the genesis of wisdom:

You can only point. You can only point to a way of holding something that's bigger than the mind. When you stop paying attention to your mind it stops being such a bother. When you stop taking it so seriously. When a thought comes through and you just look at it and say, whoa, that's interesting. Wonder where that one came from. But you don't buy into it and create a big story around it. Pretty soon that function stops functioning in the way it does when you really believe you are your thoughts. I think that most of the time we humans think we are our thoughts. (EX 9)

Overall, that exemplars could both develop awareness of a self and potentially transcend the developed self is significant. First, it gives exemplars access to their own relative development as human beings, including the influences of culture, family, and systems. Relative awareness is important in cultivating freedom from self-centeredness, projections, and subjectivity, offering increased presence to oneself, others, and the world.

Second, self awareness and self transcendence would seem to make more likely the capacity for exemplars to relatively embody, or live day to day, their arising insight of being one with the all of creation. In this way, perhaps exemplar's particular personalities and relative development are like a prism through which wisdom passes, potentially clarifying or muddling

wisdom's enactment in a context. By becoming aware of the relative interpretive lens of what is realized, exemplars can translate and impart the insight as clearly as possible into the world.

The relationship of self-awareness and self-transcendence to being one with all creation is further exemplified in exemplars words below about attending retreats.

*Returning to Exemplars' Connection to Oneness*

In addition to the importance of spirituality, a second finding supportive of the recognition of being a part of all creation is exemplars' attendance of retreats. Exemplars' retreat experiences were often imbued with profound insights into a greater connection with life:

That big shift, that transformative shift really happened when I did the 30-Day Ignition Retreat, which was 11 years ago, but it's still as fresh as can be. I really move back into those states, although I've moved way beyond who I was at that point. But It really had to do with that awareness that came to me during that retreat; that all this "driven-ness" to make my life meaningful kind of got spoken to by an inner voice that emerged of saying, "Remember, J, that I gave you your meaning at your birth." And that awareness was so transformative that it just lifted that anxiety burden of driving myself to make myself meaningful to either myself or the people around me. And allowed me to relax a bit. And it re-contextualized my life in terms of the "driven-ness" to be somebody, rather than simply internally affirm the being that I am. And I think that transition not only brought a lot of relief but, you know, reframed a sense of myself, but then also began to reframe how I experience things in the world, how I experienced other people. You know, so much of my work now is encouraging people simply to be who they are rather than striving so hard to be somebody else. (EX 11)

When I was in my late 30, I was in a retreat for 5 days just with myself in silence in a house over the ocean in Big Sur. I guess the story I would relate that could kind of help you or anyone kind of understand in words what happened, because it's very difficult for me, is you hear people talking about some sort of moment or experience, mystical experience, where they feel reborn. Where you have this, it's almost like a wiping out of who you were, and an emergence of someone that even to yourself, you're like, "I didn't used to be like this." And it happens very fast, within moments of something very profound that you experience. I spent many hours of that retreat laying on a towel in the grass staring up at the sun—just like when I was a little kid—outside of this house in Big Sur. That was a common link with being as a child as I was, I was down in the grass connected to the Earth and looking up at the sun and experiencing that kind of energy of nature. So that experience, I literally, it was like somebody reset my soul. (EX 4)

Retreats could certainly mean multiple things to exemplars: a time and place of respite and reprieve from interpersonal engagement, especially considering that exemplars are

generative, work in professions oriented to the human condition, are married, and most have children. Exemplars' highest trait anxiety item was being "tired," and one of their highest items on the Loyola Generativity Scale (LGS) was, "Other people say that I am a very productive person."

Retreats could also be a means by which exemplars revisit their vocations more deeply and specifically. Retreats could be places to have dedicated spiritual practice, as was mentioned by some exemplars (e.g., EX 11 and EX 16). They could be places to experience silence, or be near mentors and teachers.

A fourth finding supportive of exemplars' sense of connection with all creation is their meditative practices, with similar limitations as mentioned earlier, namely that what is meditative for exemplars is not uniform.

Fifth, exemplars' sense of connection with all creation could be related to higher than normative scores on the mindfulness scale, MAAS. Recall that high mindfulness scores on the MAAS are thought to reflect more receptive awareness of inner experiences and are more mindful of their overt behavior. In this study, the MAAS was used both to measure present moment awareness and to measure insight. Mindfulness was defined as the process of cultivating insight, (vipassana) which "is the understanding of the true nature of things" (Thera, 1975, p. 4) as they are from moment to moment. Mindfulness has been suggested to foster a greater connection with oneself, a greater connection with others, and with the greater whole (Shapiro & Schwartz, 2000).

A final finding potentially related to exemplars being part of larger creation was their second-most-frequently described method for learning wisdom: allowing wisdom to arise from a larger source, and learning access to that source:

And that—and I guess that’s another argument for saying that wisdom is very much something that happens through you because so is love. It’s like when you can let yourself be completely open and let go of your own biases and your own conditioning and your own need to hold yourself together, then both of those qualities can spontaneously emerge. And I think the true gift of spiritual awakening is the emergence of both of those qualities, when they’re needed, or when there’s, you know, it’s not like you go around all the time feeling wise and loving. It’s just that life responds to as needed with those qualities spontaneously . . . Then beginning to trust what arises spontaneously. (EX 9)

I think that simply the heart or spirit, if you want to use the Jungian term, the self in the larger “S,” has a wisdom. It’s amazing to me when I give up and let go what information comes to me; what direction I find to go. Say, a wise heart or movement inside of me that I have to constantly return to who, that gives me that. I don’t think you can teach it; it comes out of the, it comes out of the experience of surrender. But that’s a lifetime. (EX 17)

I think it’s a matter of learning how to open one’s self up to that. But you can teach the way to be aware and absorb, you know, the honoring of life and its wisdom. But it’s not a commodity. I guess that’s what I’m trying to say. It’s not a commodity you can teach. It’s something by the grace of life itself that can be incorporated but it’s not an achievement . . . It’s an incarnation. Not dissimilar from the Christian sense of incarnation of God and Jesus. So I really think it has a much broader metaphysical quality to it other than just the human accomplishment. (EX 11)

Perhaps then, exemplars’ speaking about a connection to oneness, or the whole of life, is suggestive of transcendent wisdom, although the psychological wisdom-related definitions of transcendent wisdom are, for the most part, not descriptive enough. What is meant by spiritual insight, or by perceiving reality? What does it mean that wisdom is potentially related to state spiritual development? Is wisdom its own particular line of development, like spirituality or intelligence, or the highest levels of multiple lines of development (Wilber, 2000)? Is self-development seemingly not necessary for access to wisdom, but is self-transcendence/awareness part of expressing wisdom cleanly? Perhaps state spirituality relates to perceiving reality, and self-development to interpreting and enacting what is realized in the world?

In general, the psychological wisdom-related research considers transcendent wisdom transpersonal and practical wisdom interpersonal. But what if transcendent and practical wisdom

were related? Certainly, it is one thing to perceive reality and quite another to act in accordance with that insight, or from that insight on a consistent basis. This potential connection between transcendent and practical wisdom will be explored later in the chapter, and with the exception of Aldwin (2009), is not spoken of in the psychological-wisdom related literature of the past 35 years.

*Exploratory Research: Exemplars Lives and Opinions of Wisdom: Practical Wisdom*

A significant finding in the lives of exemplars was that exemplars were “doing” something with wisdom, contributing in some way to the common good. This thought is resonant with Baltes’ statement that “for wisdom to be wise, it has to be used for a good goal, your own development or the welfare of others” (as cited by Kent, 1992, p. 15).

Exemplars agreed that applying wisdom for the good of others was important, defining wisdom partially as what works, is practical:

Wisdom to me isn’t wisdom without sharing. It seems to imply some sort of relationship even within the self, parts of the self. That there’s a desire for creating something new or creating something that furthers existence in some way. I almost want to say that it has a life-supporting or life-enhancing quality to it for me, a hope for continued existence.  
(EX 4)

I just think of it as the application of accumulated knowledge and experience. I don’t know that wisdom is any good if it isn’t—or what it’s for if it’s not applied, if it’s not a living kind of thing. Was it Chaucer’s criticism that the driest scholar who reads everything, knows everything and it’s just all contained within him and her. So it’s the application side that I think manifests whether it’s wisdom or not. (EX 19)

These exemplar wisdom definitions are similar to what the psychological wisdom literature considers practical wisdom. Practical wisdom is defined as skill and interest in the interpersonal domain (Wink & Helson, 1997), facilitating the optimal development of self and others (Webster, 2007), living a good life in society (Le, 2008a) and the ability to make good choices regarding human affairs (Trowbridge, 2008). Practical wisdom is a dimension of wisdom almost exclusively addressed by the psychological wisdom-related empirical literature of the last



35 years (Trowbridge, 2008), so exemplars valuation of giving of themselves to others is consistent with this research.

In the study, four main findings related to exemplars' contributions to the common good and development of others: generativity, mentoring, being teachers, and teaching technologies.

### *Generativity*

Concisely, generativity is defined as “passing on one’s knowledge to future generations” (Lyster, 1996, p. 25). It is also defined as an adult’s concern for, and commitment to, promoting the well-being of youth and future generations through involvement in parenting, teaching, mentoring, and other creative contributions that aim to leave a positive legacy of the self for the future (McAdams & Ed du St. Aubin, 1992).

An example of generativity in the psychological wisdom literature is Staudinger et al. (2005), who found that wise nominees and psychologists with higher wisdom-related performance scores are oriented towards the well-being of others and society rather than solely focused on their own pleasure. This example is significant as present exemplars are both wisdom nominees and many are psychologists. To measure generativity, the current study used the Loyola Generativity Scale (LGS).

*Loyola Generativity Scale.* The mean exemplar score for the Loyola Generativity Scale (LGS) suggested that exemplars rated themselves with above average generativity. Exemplars' highest scores on stems included, “I try to pass along the knowledge I have gained through my experiences,” “I feel as though I have made a difference to many people,” and “Other people say that I am a very productive person,” respectively. By contrast, exemplars scored lowest on the stem, “I feel as though I have done nothing of worth to contribute to others.”

In a study of wisdom across the lifespan, Wink and Dillon (2003) found that, in midlife, religiousness was correlated with generativity. Considering exemplars' religious pedigree, there is a possibility that generativity correlates with religiousness and not with wisdom. Exemplars' valuation of a spiritual perspective that transcends, but also includes, religion might offset this caveat, especially as Wink and Dillon (2003) also found that spirituality in later life was correlated with wisdom.

The LGS findings might also be weakened because there was no scale to determine social desirability. The norm sample for comparison also lacked resonant demographics. Additionally, generativity was correlated positively with the overall wisdom score, and nearly significantly at ( $r = .441, p = .052$ ). Perhaps the LGS conception of generativity is not wholly reflective of how exemplars understand generativity, or have lived generatively.

I would expand exemplar generativity to include the sentiments of Nominator 13, who said "Interest in current affairs, desirous of understanding the generation today, deep passion for growth, given to the process of refining what is important, and letting go of goals and values that no longer have a hold on them." Nominator 13's description has a cultural relevance that I think is more reflective of the generative contexts in which wisdom impacts life, rather than a source of wisdom itself.

According to the Berlin Group, "wisdom is the embodiment of the best subjective beliefs and laws of life that a culture and individuals have to offer" (Baltes & Staudinger, 2000, p. 134). Yet, it is not just that exemplars remain aware of the context of the present world that makes them wise, but also that they are able to impact the world with transcendent insight that is still relevant and applicable.

Recall that half of exemplars spoke about contributing to the culturally non-well defined, progressive, or cutting edge in service of the healing and well-being of others. Exemplars attended progressive interfaith councils, founded prison meditation programs, and offered themselves in other ways:

How do people learn to be more loving and forgiving? What are compassionate communities? How do we support the development of compassionate communities both within religious traditions and outside of religious traditions? So that it's not a particular religious orientation, but [it really looks at what is the process of transformation. How do we facilitate it and who are the people that are doing cutting edge work in these areas? It's also part of how do we connect the inner life of mind and spirit with the outer life of work in the world, not just for oneself, but from a wider number of people in the world and they do have a more of a global reach]. (EX 10)

That exemplars are bringing awareness to issues related to the betterment of oneself and others could be related to other findings. A systems perspective (HI) was the second-most positively and significantly correlated exemplar variable with wisdom (SAWS). Exemplars' spiritual and religious affiliations and belief systems would also inform motivation for the consideration of others.

### *Mentoring*

In addition to, or perhaps part of, generativity, was the second main finding that reflected exemplars' explicit contributions to the welfare of others: mentoring. Mentoring appears multiple times in the psychological wisdom-related literature of the past 35 years. Baltes and Staudinger (2000) included guidance by mentors or other wisdom-enhancing voices as a primary theoretical condition under which wisdom is likely to develop. All Buddhist monks who participated in Levitt's (1999) study reported spiritual teachers and mentors as essential to wisdom's development. The most frequent code in a study of six persons with wisdom facilitative backgrounds was guidance, which included components of mentoring and being mentored (Montgomery, Barber, & McKee, 2002).

Significant in the current study is that exemplars were mentors themselves, had mentors, and believed that wisdom was most often learned through mentoring. One nominator spoke of her exemplar this way:

I see him as a mentor and guide because he believes in me. He sees the best in me. When I feel seen and accepted like that I feel unhooked from the small self and better prepared to transcend my limited view and experience of how things are, how I am. He has certainly touched my life in a profound way. (N 12)

Feeling seen and accepted resonated with exemplars' experiences of their own mentors as well. Recall that nearly two-thirds of exemplars expressed a deeply meaningful relationship with a mentor figure:

I remember one time looking at her in the therapy and said to her, would it make any difference to you if I didn't make it? You know, if I took my own life? And, she didn't say a word. She didn't say a word. She just looked at me. And I could see the pain in her eyes that I would have to ask that kind of question. And the pain that she felt my pain that I was in such a place that I wouldn't know. And, it was very, very wise—she was young, you know. I was 50 and she was like 35. And, but she was there with her heart. And one time in desperation, she just reached over and held me. I went over on the floor and, and, and just, just her presence. And, and I could feel, I could feel her heart, that she actually really cared. (EX 17)

Anyway, I go back in, say the koan, and I just messed the whole thing up. I was a complete mess. I got the words all wrong, got the melody all wrong, everything, and I felt awful. I just felt like completely exposed and raw. And in that moment, he just looked at me, and he said, "Oh. Very good." And it was such an incredible moment. So in that moment, he was manifesting just kind of the utmost compassion and kindness and love. And because I was so vulnerable, kind of, that really just went totally right to my heart. So, you know, before that he had been this amazingly fierce, disparaging, you know [laughter], you jerk or what are all these stupid answers. But then when he saw that I was open in that very vulnerable way, he changed; it was a completely different response. And I think this is the gift of wisdom, you know, that he really knows, knows what's appropriate in a moment. (EX 15)

In addition to being seen and accepted by mentors, exemplars' experiences of deep pain and vulnerability were met with responsive attunement and conscious engagement. Important aspects of this mentor responsiveness were compassion and love, compassion being one of the most common nominator descriptions of exemplars:

His gracious and loving heart, and his profound compassion for the world at large are essential components of his wisdom. (N 12)

Loving relationships were also very important in the lives of nearly two-thirds of exemplars:

Most of the relationships in these last few years, the predominant experience is this deep, deep, heart/soul connection where love is expressed freely. There's a good deal of authenticity, people not being afraid, me not being afraid to say what I really think or feel, to allow myself and other people to show up as they want, not as I need them to show up or I'm expected to show up. The quality about them is they can change, can morph. I've got people that we've danced in different ways and somewhat easily, in many cases, have been able to let go of a certain way and come into another but still knowing there's this thread of fated connection for that time which brings a sacredness and a very deep value to these relationships. And truly, it just fills me with a level of love that I can't even (crying), I have to breathe to fully let in. And just a lot of gratitude and just sheer amazement at the beings that are in my life, just to know them. (EX 4)

Did exemplars being loved and shown compassion by mentors help them to develop these qualities in themselves? Are compassionate, loving relationships with others the fruits of what exemplars have gained, or deepened into, from their experiences with mentors? Are love and compassion related to developing wisdom, or reflective of it?

According to Ardel (2004a), the affective component of wisdom consists of a person's compassionate and sympathetic love for others (Ardel, 2004b). Compassionate relationships were also seen as supporting and reinforcing guidance in the study of six adults with wisdom facilitative backgrounds (Montgomery et al., 2002).

The present study findings also suggested that exemplars' experiences with mentors related to their ability to develop wisdom-related capacities. Recall the most frequent response exemplars offered regarding wisdom-related acquisitions was learning through mentors and teachers. The exemplar mentoring process is synthesized below based on exemplars' reflections:

1. The overall idea is that there's someone ahead of you that can see you on the path.

Begin with yourself. What is your motivation? Are you sincere? What do you want?

2. Find someone you admire, and consistently relate with them for a period of time.  
Watch how they live. Practice what they teach. Get to know how they think and how they respond.
3. Assess if you feel connected to and seen by them. If you do, allow them to impact you. But do not copy what they do.
4. Instead, attend to what is happening inside of you. If there is (conscious engagement) true mentoring happening, they will inspire you in such a way that you can find your own way, sort of catch it by being in their presence.
5. In essence, your mentor is helping to cultivate your access to wisdom. It is sort of like they are saying, “Just turn left and look here. There is the door.” And that this door to wisdom is accessible to all of us.
6. Now imagine a world where everybody knew how to access that.

Significant is that exemplars’ sense of mentoring served to cultivate an intimate, long-term relationship that allowed mentees to have embodied experience of themselves:

I really do strongly believe that truly seeing somebody . . . believing them and mirroring it back . . . is the way people learn about their own presence, and what they want to keep, and what they want to move away from. (EX 13)

Many times, when dealing directly with very challenging, very difficult or painful experiences, he clearly saw me, saw what was going on and knew precisely what I needed to hear and what I needed to do in the situation. (N 5)

The exemplar mentoring process of relationship is also resonant with an exemplar theme of acting wisely, connection with another human being:

I’d been working with this young woman for 10 years and she had such an ingrained, deep, incorporated, un-mitigating, and untouchable dimension of belief that everything she wants she shouldn’t have. And I stuck with her and keep pointing this out and addressing it in many different forms, and carrying inside of me a recognition of hope and possible change through circumstances in her life that she could receive the good things that are happening. Well, lo and behold, you know, the depth of what she had been wanting, which is a significant relationship with a man, is now in seminal form beginning

to emerge. And it seems to be coming into fruition. And it's not that I have given her all kinds of wise advice, which I haven't done. It's that in the sense of my own inner wisdom I've stuck with her in the hope that, and the support of the emergence of another part of herself that she has so suppressed. And it's coming to fruition. The thought about my wise intervention has more to do with sticking with it. The persistence of my availability and accessibility and intervention and helping her focus her life in a way that potentially can do that, get there, but just absolutely invents every possible way to deprive herself of her own inner senses about life. (EX 11)

So I said to her, it sounds like you're asking me to sit here and watch you drown. Is that right? And she said, "Yes, can you do that?" And I just closed my eyes for a moment and went in. And felt all the pain in my heart of feeling for her in this desperate place. Had all the ways that I had learned over all the years to contact people here and to help them. And I realized that all of my form and structure of how I did therapy was to avoid my own pain; the pain of just staying with my, with my heart, and my helplessness. And as she was asking me to do now with her what I had been asking her to be able to do; to let go and just be with that pain and let me be with her. But I also felt true at that moment, if I let go of all of these ways that I have of helping people, what is left; and of what value is it? For me just to be there with my own pain, see. And I could feel some of the shame, some of the very deep hidden shame about being not really worthy. Or what I, what I, who I am would not be enough. But I stayed with it because I said, I have to do this. She, she needs this from me. She needs this from me. So something gave me the courage just to stay there. And I cried [unintelligible]. And I opened my eyes and she had totally changed; her countenance had changed, a smile had come. And she reached out and made contact with me. And she said at that moment that she saw my struggle to stay in my heart to be with her, and what a gift that was to her. And that was a turning point for her therapy. And it was a moment of wisdom that just happened. I didn't do it because this is the wise thing; but I happen to be able to know that I needed to do that. Out of that came a connection. So that was a moment of acting wisely without acting wisely [chuckling]. It has no ego to it. (EX 17)

Overall, being seen compassionately by another human being in a moment of deep vulnerability was healing and integrating to exemplars. Exemplars' mentors' presence to them, and exemplars' valuation of mentoring as connected to learning wisdom, suggests a connection to what wisdom might be: Wisdom is alive, and is related to a way of receiving and responding to what is actually happening, within ourselves and others, rather than being prescriptive.

## *Teaching*

The third main finding related to exemplars' contributions to the common good and welfare of others was their teaching. For multiple reasons, exemplars seemed to appreciate both the position of teaching and the impact of positively influencing others.

Exemplars expressed that it felt natural for them to teach, and that bringing an end to suffering in others is deeply important: "I can say that I think teaching is a spiritual practice because it serves to relieve suffering, remove obstacles, help people move in directions that empower them" (EX 14).

Exemplars also taught because they became clearer themselves and were motivated by their students' desires to positively impact the world.

Exemplars taught as a means to bring life to others when it seemed that life is gone:

When I teach the death and dying course one of the things that I try to really affirm and help the students recognize is that you're not dead until you're dead. As long as there's any breath left you can embrace that. And to live out as fully as possible what life is still present inside of you. And, you know, so many people don't really comprehend it. (EX 11)

Exemplars taught because they thought it was in service of the greatest good, helping others more deeply free themselves from greed and hatred:

To the degree that we have some even small understanding of that and can help other people in that, it's the basic service. I mean, basically people do harmful things in the world because they don't understand their minds. And so to be able to help people free their minds from forces which cause suffering, like greed and hatred and fear, I think that is, that is in the service of the greatest good. (EX 15)

Overall, exemplars taught for many reasons, all of which included serving other people. That they taught is significant, as it reflects their generative, interpersonal offering to the world.



### *Teaching Technologies*

A fourth way exemplars gave themselves to others and the common good was through the particular methods they used to teach others. Exemplars' methods are distilled here:

1. Give one concept at a time. Give a way to apply it. Ask them to evaluate it.
2. Being willing to look at what there is to learn about any experience that we have to go through in this life.
3. Understand how we know what is true for ourselves.
4. Follow a healthy value to the extreme, and when you do, others will develop along with it.
5. Attend to the motivations behind speech and the frequency of the judging mind.
6. Hear various points of view. Speak to people who see things other ways.
7. Take time to rest as awareness. Having attention nowhere offers the capacity to engage direct experience.
8. Consider dispelling ignorance as a way of gaining knowledge.

Note that all of exemplars' teaching techniques are "live" practices, or learning methods geared towards increasing one's awareness through self-participation, self-reflection, self-evaluation, and self-validation. Exemplars made an explicit connection to learning wisdom-related information as seeing and participating for oneself:

In order to make it a real living wisdom, then it has to be a methodology of training attention so that we can see things clearly for ourselves. And that is the whole methodology of the path. So it can be taught, but people need to do the work themselves. It can't be given. There's a famous line in the text about how the Buddhas only point the way, and everybody needs to walk the path for themselves. So the way can be pointed out, and the path of practice can be pointed out, but real wisdom develops only when we actually do the work. And it's the work of paying attention. (EX 15)

From the development of attention and awareness for ourselves comes the possibility of more deeply meeting ourselves and others, as well as allowing the moment to elicit from us what might be needed, as exemplars' mentors did for them, and as exemplars did for others.

Overall, an important result of exemplars' influences on others seems to be the cultivation, and possible recovery, of one's internal teacher (Levitt, 1999), or the rediscovery of our own way:

He has helped countless people through sharing his own wisdom- attained through his own inner and outer journey and research—and by helping people access their own truths and “sing their song.” He shares time-tested truths of wisdom from the ages and helps people connect this truth to their own lives. (EX 4)

I would say being what comes up in the moment as a feeling is being helpful to people, especially in helping people to wake up. I do seem to be graced at this stage with capacity to be able to see into people and be of help to them. (EX 16)

### *Exploratory Research: Additional Significant Exemplar Qualities*

#### *Telling the Truth*

Valuing telling the truth was an important quality in exemplars' lives. Exemplars, for the most part, seemed to tell the relative truth and know the absolute truth, if even for a moment.

Some possible explanations for the importance of truth telling:

1. Telling the truth, when related to exemplars' high resonance with humility, could be construed as confessing reality, or what is as close to what they experience reality to be. Exemplars doing so while not protecting themselves, diminishing themselves, or enhancing themselves would seem to amplify the impact of the sharing on themselves and others.
2. Telling the truth, when related to exemplars' lower than normative state and trait anxiety, could have relived exemplars from needing or using certainty in multiple contexts for their own emotional regulation. Less anxiousness and telling the truth is

potentially liberating from the cultural imperative to overvalue knowledge as competence, and could allow exemplars the capacity, if not the actuality, of communicating their limitations.

3. Telling the truth could have been used as a catalyst from unconscious to conscious knowing in exemplars' self-development and self-transcendence. Telling the truth could have been reflective of exemplars' increasing freedom from conditioning and patterns of cultural expectation:

Your mind, the mind, my mind or anybody's mind, gets clearer and clearer when you don't lie. It's sort of like karmic, positive karma. Is that when you don't lie, you don't confuse yourself, and then the less and less confused you are, the clearer [laughter] and clearer you get. (EX 20)

4. Telling the truth, when related to exemplars' higher than normative mindfulness and valuation of self-awareness, would seem to orient exemplars to what is actually happening in the moment, as it seems to be unfolding in each moment. Telling the truth would allow exemplars to externalize their inner processes in relationship to others, particularly relevant in their professions oriented to the human condition.

### *Tolerance of Uncertainty*

Paraphrasing the words of one wise person nominated multiple times by the exemplars: Certainty is the killer of consciousness (Adyashanti, 2011). For exemplars, certainty might be likened to the killer of aliveness, of spontaneity, by the human imperative to conceptualize, to predict and defend against the uncertainty of unfolding life as it is. Recall that nearly a third of exemplars spoke about learning wisdom-related processes as facilitated by de-centering from a primary self-identification with the thinking mind and cognitive processes:

Another aspect is facilitating empathy and getting the conscious mind not just thinking, not just sense—getting the conscious mind out of the way and providing quiet time. It's

the same sorts of things that you would think of in some kind of meditation or spiritual practice where you are getting the conditioned automatic reactions out of the way, out of the dominant way, so that any of those that are appropriate may be used, rather than ones that are overly conditioned. (EX 14)

In exemplars' lives moments arose when a transformation from knowing to the acceptance of unknowing altered the way they lived:

There was kind of a moment, flash, of realizing that it was OK not to know and that I'd know when I know. I didn't have to know. And just that really had a big change in my life because I think we're often fearful of the apparent insecurity of not knowing. (EX 15)

Recall too that the most prevalent definition of wisdom, according to exemplars, comes from this place of unknowing:

Wisdom arises out of a pregnant emptiness. It's a surrender of everything that you think you know . . . it's accepting your heart and your helplessness. When you're no longer engaged in a solution or in a goal with what has to happen or what you think should happen, no longer protecting yourself against whatever the outcome is, there comes a gentle wisdom from the heart that expresses the meaning of the moment without attempt to change it, or control it, or influence it. (EX 17)

The tolerance of uncertainty, when combined with openness to experience, humility, lower than normative state and trait anxiety, and a sense of oneness with all life, could foster a creative capacity within exemplars and promote a deeper trust in the unfolding of life.

Exemplars' deepening trust contributes to their capacity to let go and allow wise action, or the light of wisdom, to shine through exemplars in unfamiliar contexts:

What is it to act wisely? If it's to act on guidance when you don't know what the hell you're doing and have no clue what's going on, I can say I've done that a lot, and had no clue. Certainly didn't have the thought, "Well, this is wise," or "This is a wise decision." I usually wondered, "What the hell am I doing? I don't know what this is." So if my definition is acting out of not knowing and following the guidance, I could say I've done it a lot. (laughter) I don't ever know when I do something, you know. If I'm attentive and I'm listening and I'm trusting, you know, and I've come to trust where things come from. My mind might be saying, "This is so fucking weird." You know, "What are you do—this is crazy," or—you know, I don't listen to that anymore. The mind will still chatter that way, but I think I guess I've had enough experience over the years to trust what comes, that there's an organicity to it, and it feels so embodied. (EX 6)

The tolerance of uncertainty, then, when combined with spiritual insight and self-awareness, is perhaps not just knowing what you know and don't know, but *how* you know and don't know, and *who is the knower* of what is known and unknown.

### *Reflective Articulation Process*

Exemplars transition from predominantly cognitive knowing to trusting embodied awareness resonates with the reflective articulation process. Sixty-five percent of exemplars expressed having a reflective articulation process in which their way of knowing, responding to others, and being in the world is initiated through an intuitive channel out of which come creative and spontaneous images, words, and concepts relevant to the context. Taranto (1989) points out the connection of intuition with wisdom and she mentions that Piaget claimed that intuition precedes logic (Trowbridge, 2005). Intuitive knowing is also resonant with the “a priori” notion of wisdom put forth by McKee and Barber (2002).

Often the responses below were prompted by the question: What is your phenomenology of knowing? How do you know that you know? or Where did you “go” to answer this question?

The way I've come to understand about my own way of working is that my primary access to knowing is intuitive, not cognitive. And, therefore, cognition is a result of intuitive awareness. And that's my entrée into myself, my entrée into another person, entrée into the world around me, which then it makes sense, you know, that reflective process is the way I think. Which is a lot different from other people. Other people lead into the world through their head. And I really lead into the world through my gut. (EX 11)

So there is that feeling just outside of my immediate consciousness, and I pause and something emerges out of that, comes out of that, like teaching. So, once I know what the topic is, I can talk about it. I don't have to think about what I'm saying. (EX 14)

I guess it feels mostly to me like listening. Kind of listening to myself. Or listening for something to come up from the belly kind of. Kind of asking myself what's true. I don't know. And listening. And seeing what emerges. I think that things arise for me that way both as sometimes like an image, and sometimes in words. (EX 9)

It's extremely intuitive. And this is really how I work with students on retreat also, in the interviews. I've really come to trust the space of mind out of which things come. And this has happened over many years, and I really trust it a lot. So it's almost like the question drops into space, and then something comes. And so it seems a very unpremeditated—you know, it's just what comes out of the mix of my understanding and experience. (EX 15)

The importance of the reflective articulation process is that it was not a prescription for action, but an in-vivo means of connecting exemplars' intuition with context. Said another way, the reflective articulation process allowed exemplars' non-conceptual knowing to inform interpersonal relationships.

### *Gratitude, Appreciation, and Life Satisfaction*

Exemplars scored nearly 20% higher than the norm on life satisfaction and also conveyed being extremely grateful and appreciative. As aforementioned, there are so many possible reasons for exemplars' high life satisfaction and deep gratitude: loving relationships with mentors, spouses, and friends; a tolerance of uncertainty, profound spiritual connections, a sense meaning and purpose, high harmoniousness scores, high levels of education, socioeconomic stability, believing their lives has been impactful, being physically healthy, profound gratitude and appreciation, low perceived stress, little to no state or trait anxiety, and a high capacity for emotional regulation. Exemplar's highest scoring item was, "So far I have got the important things I want in life."

Despite exemplars' experience of many of the important things in life they wanted, perhaps exemplars truest sense of life satisfaction and gratitude comes from their perception of reality, not just the shifting contexts and contents of their lives. In other words, perhaps satisfaction and gratitude also arise from how exemplars see what they are and what they have, not just having or not having:

I enter the day with a sense of gratefulness and thankfulness, a bow of gratitude for this day. It's such an elemental thing that we have to come to terms with. We did not generate our life. That life was given to us. And we forget that our place in life is simply honoring the gift that's been given to us and having a strong sense of stewardship of all the life and living that's around us, whether it's nature, another person, an institution, or whatever it is. We honestly don't possess anything . . . We're just given a lot of stuff to take care of. (EX 11)

### *Section 5: Findings Integration: The Lantern*

In the closing moments of the interview with Exemplar 2, he likened religious traditions to the Chinese lantern, a metaphor that has since become a (meta) perspective reflective of my understanding and discussion of wisdom exemplars:

Think of religious traditions as an eight-sided Chinese lantern and in the middle, there's a candle. You don't know where the light comes from but the light is filtered through those various colors of glass. All those colors of glass, all those pieces of glass are manmade. They distort the light. Now, there are a few that are more transparent than others . . . But all major religions are just like those glass in the lantern. What's the light? You don't know what it is. That's where you come to your mystery again. But you are perfectly free to assess any human construction of any kind once you know about it, once you learn about it. But you have to learn about all of the glass, not just the one. You see? (EX 2)

Perhaps exemplars are akin to the stained glass in the eight-sided lantern, and in the middle is the light of wisdom. For multiple reasons found in the study, exemplars are able to filter the light of wisdom through their humanity into the world with less distortion and more transparency than the average human being.

#### *Exemplar Connection to Source, Ground, or Spirit*

Like the inner sides of the glass, exemplars have cultivated, or have been graced with a (state based) receptivity to the source and radiance of wisdom, whatever wisdom is. Exemplars' longstanding practices of meditation, valuation of mindfulness, and attending retreats; relationships with mentors; and long term-experience with multiple religious traditions and spiritual practices are all thought to be related to this capacity to access wisdom.

Exemplars' notions of wisdom also support an ephemeral element of wisdom. Forty percent of exemplars talked about learning wisdom as a letting go, surrendering, and experiencing an incarnation from something larger than the individual. Wisdom was also defined by exemplars as coming from the unknown, and *access* to wisdom can be pointed to and cultivated:

Wisdom is something by the grace of life itself that can be incorporated but it's not an achievement . . . It's an incarnation. Not dissimilar from the Christian sense of incarnation of God and Jesus. So I really think it has a much broader metaphysical quality to it other than just the human accomplishment. And teach, I think, how one can receive it, but you can't teach wisdom. Nobody ever truly has fully incorporated wisdom. It's much bigger than the individual. (EX 11)

For me (wisdom) is what arises when I admit that I really don't know anything. It's like something that comes spontaneously from being willing to sit in the not knowing. And having no personal agenda. So that whatever movement happens is happening almost through you rather than from you. It's being willing not to be attached to your ideas. It doesn't mean that what you know or you've learned or you've experienced isn't useful, because in a way that, for me, that integrates with this other kind of intuitive knowing. But it's sort of like letting the flow arise rather than going at it from an analytical perspective or a memory perspective. I don't know. I guess I think of wisdom as kind of a universal quality that pops up once in awhile in anybody. And it's coming from some other source in a way. So it plays through us when we're not overly involved in our concerns. (EX 9)

Exemplars' recognition of wisdom as incarnational, or coming from another source, is similar to the notions of transcendent wisdom put forth in previous literature. Transcendent wisdom is associated with "interest and skill in the transpersonal domain" (Wink & Helson, 1997, p. 12) insight into reality (Le 2008b, Trowbridge (2008); seeing through illusion, wisdom as a priori, or derived from intuitive insight (Barber & Mckee, 1999); and transcending the personal, is insightful, and demonstrates spiritual depth (Wink & Dillon, 2002). Transcendent wisdom could also be part of what Trowbridge (2008) refers to in his sense of one's ability to perceive reality, reflected in Exemplar 9:



What it does is it ends the seeker when you recognize the truth. It just eliminates that. You realize you're not there. There's nobody really there. There's only a set of experiences. And that you are this—that what I am and what you are, there's absolutely no difference at the core. Every living thing is the same thing. It also eliminates any tendency to think that you're different than anyone else because everyone else is this too. It's just totally obvious. And so it just kind of ends the journey. (EX9)

Spirituality is thought to be related to this insight. Sixty-five percent of exemplars spoke about the spiritual as being inseparable from the wholeness of life, and the same percentage of exemplars expressed having a reflective articulation process through which they have access to an intuitive awareness out of which come creative and spontaneous images, words, and concepts relevant to their current context.

Almost all exemplars valued the importance of spirituality in their life as measured by the Spiritual Perspective Scale (SPS), which was also positively and significantly correlated with wisdom. The highest stem on the SPS was, "Spirituality has played an important role in my life." Eighty-five percent of exemplars reported having a current religious or spiritual tradition; 80% had spiritual practices; 50% have more than one spiritual practice; and 55% attended retreats.

#### *Relative, Reflective Self-Awareness*

The lantern glass itself is conceived of as exemplars' relative humanity and conditioned conceptual identity. Exemplars' valuation of, and capacity for, self-awareness and self-reflection is thought to relate to an awareness of their own self-knowledge and development. To varying degrees, exemplars are able to see and assess within themselves their own human, cultural, developmental obstacles to clear and continuous/ or abiding access to source. Metaphorically, this increasing self-transparency and permeability allows light to flow from the inside of the lantern out through the glass with minimal distortion.

This capacity for self-awareness is similar to the Le and Levenson (2005) conceptualization of self-transcendence, or "the ability to move beyond self-centered

consciousness and to see things as they are with clear awareness of human nature and human problems, and with a considerable measure of freedom from biological and social conditioning” (2005, p. 444).

The capacity of exemplars to witness their own development (moment-to-moment experiences) is also similar to the reflective component of Ardel’s (2004a) model of wisdom: self-awareness, self-insight, self-examination, and the capacity to take multiple perspectives of phenomena (Ardelt, 2004a). This self-reflection practice informs an undistorted comprehension of reality by facilitating an awareness and transcendence of one’s projections and subjectivity.

Related present study findings include: exemplars’ valuation of self-contact and self-awareness, higher than normative mindfulness scores; learning wisdom as decentering from thinking; technologies for learning wisdom as ego-deconstructive; high resonance with the Humility Inventory; and lower than normative state and trait anxiety. The fact that many exemplars are psychotherapists or counselors points to the direct engagement of exemplars with professions oriented to the human condition, many of which are related to developing self-knowledge.

### *Conscious Expression*

The outer edge of the lantern glass is conceived of as exemplars’ conscious relationship with others and with the world. Exemplars’ interpersonal relationships likely align with what the psychological wisdom literature considers practical wisdom. Practical wisdom was defined as skill and interest in the interpersonal domain (Wink & Helson, 1997), facilitating the optimal development of self and others (Webster, 2007), living a good life in society (Le, 2008b) and the ability to make good choices regarding human affairs (Trowbridge, 2008).

The high importance and prevalence of exemplars' loving relationships, valuation of truth-telling, higher than normative generativity scores, multiple avenues of generativity, deep connections with others, being sought out for counsel, and roles as educators, therapists, and spiritual teachers all are supportive findings.

*Fusing the Lantern Metaphor*

When there is some degree of development/accessibility for exemplars in all three areas—(a) spiritual insight (transcendent wisdom): or a deep receptive potential to or recognition as (and as) the unknown source of light; (b) self-awareness/ self-knowledge/ self-transcendence or an awareness of relative humanness; and (c) conscious engagement, or interpersonal accessibility in relationships/contexts (practical wisdom)—wisdom can flow through and permeate exemplars' humanness, responding to the arising contexts of life with minimal distortion.

Exemplars' reflective articulation process, acting in the world as luminaries and visionaries, making life decisions without rationally knowing why, and experiencing oneness with all of life seem reflective of this connection between transcendent and practical wisdom, embodied through exemplars, understood through the use of the lantern metaphor.

Ultimately, exemplars—momentarily, or, perhaps, in an abiding way—seem to become aware as, and of, both their immanence (humanity) and transcendence (divinity), such that both impact the world with practicality. While the spiritual and transpersonal perspectives reflective in the findings of the study place the current research in the minority of psychological wisdom-related research of the last 35 years, it is worth noting the observations of Trowbridge (2008).

Trowbridge observed the following:

1. The divine, religious aspects of wisdom have been mainly ignored by psychologists.
2. Wisdom cannot separate itself from religion or questions of ultimate meaning, so long

as what is wise is connected with judgments regarding what is best for men and women.

3. The traditional understanding of wisdom cannot be simply accepted.

### *Section 6: Final Thoughts*

#### *A Conception of Wisdom*

The study findings and the researcher's hypotheses inform a wisdom conception that integrates transcendent and practical wisdom: From one's cultivated or graced porous receptivity and practical experience arises information, known and unknown, evoked by, and applied to, a context; with conscious consideration and awareness of, or as, relative self, others, and universal ground; conveyed with the intention of un-distortion and with transcendent aliveness, amenable to, but not entirely limited or defined by conscious comprehension, and yet practically accessible, towards truth.

Said another way: openness receives our previous knowledge and experience, mixed with the potential for novel, spontaneous arisings; in response to a context; knowing ultimately what one, others, and life are; with a deep intention of getting out of the way; conveyed with what is uniquely needed; toward the Truth.

What seems most important about wisdom is that it is alive. It is not a prescription. It can use multiple pathways of knowing. It arises from things we already know and will birth insights that otherwise would never come, in response to the unique context we are in. We will both feel out of the way and deeply intimate in relationship. Wisdom reveals the truth of the moment, but is not necessarily validated in a moment of understanding.

Wisdom is paradoxical. It is both constructive and deconstructive. It requires doing and being, and is both meditative and generative. Wisdom arises both alone and in communion.

Wisdom is expressed, or is translated, through many personal developmental lenses. Whatever developmental perspective is interpreting and enacting wisdom, recognizing when one is speaking from a personal place versus allowing wisdom to use the personal, is incredibly useful. But maybe that recognition is not necessary at all, or is in itself part of development, accessible and useful in some contexts and not in others. Ultimately, perhaps the word wisdom is just another referent to a process, a capacity that must be lived in order to be alive.

This wisdom conception has resonance with the notions of Sternberg (1998), Montgomery et al. (2002), Trowbridge (2005), and Aldwin (2009).

### *Concluding Summary*

Exemplars are like the metaphor of the Chinese lantern. Their lives and expressions of humanity are each unique, yet their access to the light of wisdom similar.

The reflective articulation process embodies the convergence of exemplars' wisdom opinions, qualities, and lives. As one exemplar stated, "It's feeling intuition and out of that come words and concepts" (EX 11). This sentiment echoes the words of Taranto (1989). She points out the connection of intuition with wisdom and mentions that Piaget claimed that intuition precedes logic (Trowbridge, 2005).

The two predominant definitions of wisdom given by exemplars were that wisdom comes from the unknown, and is practical. Exemplar qualities of openness to experience and the tolerance of uncertainty seem a prerequisite of their receiving from the unknown, while a systems perspective, telling the truth, generativity, and loving relationships catalysts of the contextual application of wisdom in the world.

Humility and truth telling characterize both exemplars lives and seemingly the intention and expressions of wisdom. The significant importance of spirituality offers a sense of deeper

exemplar belonging to everything—communion, union, being all. Belonging to everything provides exemplars a deeper sense of guidance, perspective, and knowing about what it all means, while simultaneously not knowing at all.

Exemplars have the deep capacity to reach into others, to see into others, to connect with others, to attune with others. Part of this potential is because they are able to see and attune within themselves first. Exemplars value self-awareness and self-knowing, and have had mentors whose profound compassion and self-awareness, combined with their truth telling, have calibrated safety, insight, and integration.

Exemplars do not seem to live from the imperative to know, but are tolerant of the unknown. Tolerating the unknown is crucial in their lives as luminaries, and reflects exemplars' connection to emergent ideas from the "void" that generatively impact the lives and cultures in which they interact, often well ahead of normative consciousness. As one exemplar reflected: "How do we connect the inner life of mind and spirit with the outer life of work in the world, not just for oneself, but from a wider number of people in the world and they do have a more of a global reach" (EX 10)?

Exemplars' lives and actions are reflections of their wisdom definition: following the unknown, intentionally cultivating receptive potentials, and acting in the world with practicality. Exemplars are transformational agents because, paradoxically, they do not request change, but recognize others from a place of deep acceptance. One example, "So much of my work now is encouraging people simply to be who they are rather than striving so hard to be somebody else" (EX 11). Exemplars seeing people for who they are is transformative, and exemplars' open receptivity does not force agendas or beliefs on others.

Instead, exemplars invite others to find their own path as the generative invitation of relationship. Mentoring is a profound tool of exemplars' offering to others, as embodied wisdom is not the ownership of the person, but the vibrant receptive potential within us all. One does not teach wisdom, but learns access to wisdom. Retreats, long-term meditation practices, and technologies for awakening to one's own potential to be receptive are important to exemplars, and ultimately, to wisdom.

### *Implications of the Study*

1. The most important variable for learning wisdom-related material was mentoring. One should strive to find mentors that have some sense of what wisdom actually is, who are engaged in their psycho-spiritual-interpersonal work, and can awaken others' access to wisdom. Mentors need to be aware of their own needs and meet others with loving availability and interpersonal skillfulness.
2. Spirituality was an extremely important part of exemplars' lives. Becoming aware of one's own relative and ultimate selves is transformative. This realization cannot be copied or adopted from another, but must be realized directly. To know what we are not is a good step. To un-know ourselves is also a good step. To truly know ourselves would be to know all things (Trowbridge, 2008).
3. BFI Openness to Experience was the most positively and significantly correlated variable with wisdom (SAWS). One should practice being open to experiences of all kinds: inner experience, interpersonal experience, and transpersonal experiences.
4. Systemically, we should teach wisdom-related processes earlier in life. One possibility is to offer live practices that allow others to have experiences of seeing and evaluating for themselves. Some examples: Robins (1998), Wisdom Therapy; Brown

et al. (2003), Learning from Life Process of reflection, integration, application;  
Trowbridge (2006), Wisdom Centered Life.

Some wisdom-related processes based on the study include: (a) Learn how you know what is true for you; (b) become aware of your own needs, motivations, and assumptions; (c) create a peer group of people that share a similar vision to you and will tell you the truth; (d) spend time around people/mentors that can teach you about your internal teacher; (e) see if you can live from a space of not knowing; (f) spend regular time on retreat, in silence, or with a trusted mentor; (g) instead of answering questions, question your answers; and (h) do not take any of these suggestions more seriously than your own experience.

#### *Section 7: Directions of Future Research*

The present study could best be considered a pilot. It could be replicated with a sample of 30 exemplars or more, which would make generalizability possible.

#### *Compare Exemplar Findings*

1. Comparing the exemplar group to a control group could yield interesting results. It would be challenging, though, to find a control group with matching demographics.
2. Compare the exemplar group to the nominator group. The researcher's experience was that the nominator group was also rich with wisdom.
3. Perform a median split on the exemplar data to compare those with a wisdom score above 201.6 with those below 201.6. This comparison could be useful to determine whether there are any significant differences between groups of exemplars.
4. Compare exemplar results them with another exemplar sample where the nomination process was not as rigorous. Do lay people, when asked to nominate wise people, choose people with similar qualities?



5. Replicate this study in another country or culture, and compare the results to the current study.
6. Compare the existing exemplars to past studies, like Baltes, Staudinger, Maercker, and Smith (1995). Also, give the Berlin wisdom measure to exemplars and see how they score.

#### *Additional Ways of Gathering Data*

1. Without disrupting the intimacy of the interview, employ a wisdom task similar to the Max Plank Group studies. An intervention like this offers the chance for exemplars to respond in the moment. One example might be sharing the same personal dilemma for the interviewer in each interview and getting exemplars' feedback. Scoring methodology could then be adapted from Max Plank Group or could be constructed by the researcher.
2. Use different measures to gather information, like the Nondual Embodiment Thematic Inventory, for example, which measures embodiment (Butlein, 2005). Adding additional measures, like self-compassion, forgiveness, and love might be interesting to elicit perspectives on the cultivation of these qualities.

#### *Continue the Nomination Lineage*

1. Interview the people these exemplars nominated as wise. Then interview those people who these exemplars think is wise, and so on.
2. Invite an iterative process where the results of this study are offered back to participating exemplars for reflection, critique, and meaning-making contributions.

### *Expand the Quantitative Analysis*

There is much potential statistical analysis that can come from this information. More robust tests like factor analysis would be revealing.

### *Expand In-Depth Interviewing*

1. The researcher did not ask specifically about suffering and hard times in exemplars' lives.
2. Gather perspectives from family, friends, colleagues, and clients regarding exemplars.
3. Visit multiple times with the exemplar in different contexts.
4. Create an exemplar wisdom panel of those who participated in the study. Have them work on some a relevant wisdom related task.

## *Section 8: Limitations and Delimitations*

### *Limitations*

1. In this study of exemplars, multiple methodologies were drawn upon to provide converging evidence and information with the belief that this approach would provide meaningful data. There are certainly other ways of gathering meaningful information.
2. A second limitation concerned the inherent complexity in attempting to measure a construct such as wisdom with quantitative measures. Webster (2003) writes, "Is it a fool's errand to try and capture wisdom within the parameters of a pen-and-pencil questionnaire" (p. 13)? In the end, wisdom may or may not be correlated with the constructs put forth in the Self-Assessed Wisdom Scale.
3. Third, the fact that considerable consensus regarding people's concept of wisdom has been found lends support to the idea that trustworthy nominators can be found (Orwoll & Perlmutter, 1990). Yet there are no guarantees that these nominators provided

- exemplars of wisdom. Moreover, it was possible that the premise that nominators would know what wisdom is and be able to provide exemplars of wisdom was also false.
4. Similarly, the assumption that the participants in this study were exemplars of wisdom could be false. Exemplars of wisdom are seemingly rare as evidenced by the fact that no empirical studies have been undertaken to date for comparison or validation of this study (Trowbridge, 2005).
  5. Conceptually, did it make sense to separate the lives, qualities, and opinions of wisdom? Was that even valid? Those containers were just to provide theoretical structure.
  6. Thematic analysis requires some degree of subjective interpretation and integration. The researcher was the primary instrument in this portion of the investigation. The results and conclusions are limited to the parameters of my comprehension.
  7. Exemplars were highly educated. Perhaps this was a more central variable in the findings than wisdom.
  8. Regarding the qualitative research, the researcher could have unknowingly biased the interviews. Admittedly, I was curious about not only what exemplars would share, but their phenomenology as well.
  9. The fact that part of the study required an in-person interview could have deterred more introverted exemplars from participating.
  10. The study required some degree of computer access and literacy. Although efforts were made in two instances to accommodate exemplars, it was possible that

- nominators, because of this requirement, did not consider potential exemplars of wisdom.
11. Some parts of wisdom seem to be non-conceptual and post-linguistic, yet all measures were linguistic and conceptual.
  12. In light of the findings, it could be useful to include a wider swath of interdisciplinary wisdom literature.

### *Delimitations*

1. There are a small number of participants. Results do not have the potential to generalize to any population.
2. The study was a partial convenience sample. It required that some proportion of the nominators and exemplars reside in the San Francisco Bay Area and speak English.
3. All quantitative measures were self-report and no assessment of socially desirability was employed.
4. Wisdom was proposed as the convergence of qualities—from empirical, theoretical, psychological, spiritual, cultural, and philosophical perspectives—most likely necessary, but not sufficient, in illuminating its essence.
5. The proposed exemplar methodology was only one of many potential ways of identifying exemplars (e.g., Colby & Damon, 1992) and should be considered as such.

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## Appendix A: Nominator: Informed Consent Form

Dear Participant:

You are invited to participate in a doctoral dissertation research project examining wisdom through an exploration of the lives and opinions of its exemplars. The daunting crises that face the global community and wisdom's potential for human flourishing seem to make it an apropos topic for consideration.

As a doctoral student at the Institute of Transpersonal Psychology, I am hoping to offer a contribution to the psychological study of wisdom as well as examine its potential applications to the greater human community. Your converging backgrounds of pastoral/spiritual care, psychotherapy/counseling, and teaching offer valuable expertise relevant for this endeavor.

The required total time for your participation, should you choose, is approximately 2-3 hours, likely spread over several weeks. Principally, you will be asked to identify between two and five exemplars of wisdom known to you personally. You are invited to employ a 3-day discernment period, if necessary, in settling on your choices. If you believe yourself to be one of the five wisest exemplars, you are invited to include your name. For the two wisest exemplars, you will then be asked to: (a) answer a question regarding the relationship context and length of time knowing the exemplar; (b) fill out a brief measure of wisdom characteristics that seems to reflect his/her qualities; (c) write a one-page reflection of why he/she is an exemplar of wisdom; (d) provide contact information to the researcher (e.g., e-mail, phone number, or mailing address). A demographic questionnaire will be presented for your personal review and completion. I ask that the two one-page reflections, characteristics scales, and the demographic questionnaire be completed online within 2-3 weeks. The researcher will scan the materials for missing data and contact nominators by email or phone if follow up is necessary.

For the protection of your privacy, all information received from you will be kept confidential as to source and your identity will be protected. All paper materials will be stored in a locked filing cabinet, all electronic materials will be contained within a password protected database, and the research Web site host will have signed an official confidentiality agreement. Additionally, in the reporting of information in published material, any information that might identify you will be altered to ensure your anonymity (if you so choose). The only exception to this policy is the request to use your name when contacting the two wisest exemplars that you nominated. For example, the researcher might include a sentence that says, "(Your name) has nominated you to participate in a research study exploring people who are considered exemplars of wisdom."

This study is designed to minimize potential risks to you. However, some mild anxiety could arise around the process of selecting exemplars, concisely writing about their wisdom, or working with the online data collection site. If at any time you have any concerns, questions, or any discomfort directly or indirectly related to the study, I will make every effort to discuss these issues with you and inform you of options for resolving your concerns. Three San Francisco Bay Area psychologists are also available for referral, should you need.

While minimal risks are a part of many research studies, it is hoped that you will feel the rewards of sharing your experiences of wisdom and knowing that others can learn from them. Perhaps the process of reflecting on an exemplar known to you might also bring a deeper appreciation for their presence in your life, or cultivate a more intentional noticing of how wisdom is a part of your daily life.

If you have any questions or concerns, you may call me, Drew Krafcik, collect at (650) xxx-xxxx, or Shani Robins, Ph.D., Dissertation Chair, at (858) xxx-xxxx, or the head of Research Ethics Committee of the Institute of Transpersonal Psychology, Fred Luskin, Ph.D., at (650) xxx-xxxx.

If you decide to participate in this research, you may withdraw your consent and discontinue your participation at any time during the conduct of the study and for any reason without penalty or prejudice.

You may request a group summary of the qualitative and quantitative research findings by providing your mailing address with your signature.

I attest that I have had the study explained to me, read and understood this form, and had any questions about this research answered to my satisfaction. My participation in this research is entirely voluntary and no pressure has been applied to encourage participation. My signature indicates my willingness to be a participant in this research.

(If you would like to participate, please type in your name on both "Participant" lines below, fill in the date, and return the consent form to [drew.research@yahoo.com](mailto:drew.research@yahoo.com). In the subject line of the return e-mail, please write your name, that you are giving informed consent, and include this name for the research project, "wisdom study." For example, "J. Brown gives informed consent to wisdom study." You may fax or mail back the consent form as well.)

\_\_\_\_\_

Participant's Name (please print)

\_\_\_\_\_

Date

\_\_\_\_\_

Participant's Signature (please print)

\_\_\_\_\_

Date

\_\_\_\_\_

Primary Researcher's Signature (please print)

\_\_\_\_\_

Date

Mailing Address (if you want summary of group quantitative and qualitative research findings):

\_\_\_\_\_

---

Primary Researcher's Signature (please print)

---

Date

Tel: xxx-xxx-xxxx

Fax: xxx-xxx-xxxx

drew.research@yahoo.com

## Appendix B: Exemplar Informed Consent Form

Dear Participant:

You have been nominated by \_\_\_\_\_ to participate in a doctoral dissertation research study exploring people who are considered exemplars of wisdom. The daunting crises that face the global community and wisdom's potential for human flourishing seem to make it an apropos topic for consideration. As a doctoral student at the Institute of Transpersonal Psychology, I am hoping to offer a contribution to the psychological study of wisdom as well as examine its potential applications to the greater human community.

The required time for your participation, should you choose, is approximately 1.5 to 3 hours. Principally, you will be asked to complete an online survey consisting of multiple-choice questions and sentence completion items that will take about 75 to 90 minutes. The purpose of this survey is to gather information about characteristics and qualities of exemplars. A demographic questionnaire will also be included in the measure for your personal review and completion. I ask that the entire online survey be completed within 2 to 3 weeks. The researcher will then scan the data and contact participants with missing or incomplete information and offer the chance for follow up.

With your permission, I might also be contacting you for a 60 to 90 minute interview at a neutral location and time amenable for us both. The purpose of this interview is to provide a space to inquire and hear about the lives and opinions of exemplars. For the protection of your privacy, all information received from you, both online and recorded, will be kept confidential as to source and your identity will be protected. Information will be kept confidential by assigning participant names (e.g., EX 1). All paper materials will be stored in a locked filing cabinet, all electronic materials will be contained within a password protected database, and the Web site research host will have signed an official confidentiality agreement. Additionally, in the reporting of information in published material, any information that might identify you will be altered to ensure your anonymity (if you so choose). Any transcription of materials will be conducted only after the transcriber has signed a Transcriber Confidentiality Agreement.

This study is designed to minimize potential risks to you. However, mild anxiety could arise around sharing your life experiences and/or working with the online research site. While minimal risks are a part of many research studies, it is hoped that you will feel the rewards of sharing your experiences, knowing that others can learn from them, and perhaps cultivate a deeper sense of your own wisdom in the process. If at any time you have any concerns, questions, or any discomfort directly or indirectly related to the study, I will make every effort to discuss them with you and inform you of options for resolving your concerns. Three San Francisco Bay Area psychologists are also available for referral, should you need.

If you have any questions or concerns, you may call me, Drew Krafcik, collect at (650) xxx-xxxx, or Shani Robins, Ph.D., Dissertation Chair, at (858) xxx-xxxx, or the head of Research Ethics Committee of the Institute of Transpersonal Psychology, Fred Luskin, Ph.D., at (650) xxx-xxxx.

If you decide to participate in this research, you may withdraw your consent and discontinue your participation at any time during the conduct of the study and for any reason without penalty or prejudice.

You may request a group summary of the qualitative and quantitative research findings by providing your mailing address with your signature.

I attest that I have had the study explained to me, read and understood this form, and had any questions about this research answered to my satisfaction. My participation in this research is entirely voluntary and no pressure has been applied to encourage participation. My signature indicates my willingness to be a participant in this research.

(If you would like to participate, please type in your name on both "Participant" lines below, fill in the date, and return the consent form to [drew.research@yahoo.com](mailto:drew.research@yahoo.com). In the subject line of the return email, please write your name, that you are giving informed consent, and include this name for the research project, "wisdom study." For example, "J. Brown gives informed consent to wisdom study." You may fax or mail back the consent form as well.)

\_\_\_\_\_  
Participant's Name (please print)

\_\_\_\_\_  
Date

\_\_\_\_\_  
Participant's Signature (please print)

\_\_\_\_\_  
Date

\_\_\_\_\_  
Primary Researcher's Signature (please print)

\_\_\_\_\_  
Date

Mailing Address (if you want summary of group quantitative and qualitative research findings):

\_\_\_\_\_  
Thank you for your participation!

\_\_\_\_\_  
Primary Researcher's Signature (please print)

\_\_\_\_\_  
Date

Tel: xxx-xxx-xxxx

Fax: xxx-xxx-xxxx

[drew.research@yahoo.com](mailto:drew.research@yahoo.com)

## Appendix C: Exemplar Interview Consent Form

Dear Participant:

I am pleased to inform you that you have been selected to participate in the interview portion of this study. If you choose to take part in this section, I would like to schedule a neutral location and time with you of no more than 90 minutes for a face-to-face interview to get a deeper sense of your personal opinions and life reflections. During the interview, if there are any questions that you do not feel like answering, you have the option not to answer. Please remember that your identity will be kept anonymous during this process and all communications will be kept confidential. Likewise, any transcription of materials will be conducted only after the transcriber has signed a Transcriber Confidentiality Agreement. Please let me know by [specified date] if you would like to be a part of this section of the study.

Should you decide to participate, please type in your name below and include in the subject line of the return e-mail: “(Your name) signs Interview confidentiality agreement for wisdom study.”

\_\_\_\_\_  
Participant’s Name (please print)

\_\_\_\_\_  
Date

\_\_\_\_\_  
Participant’s Signature (please print)

\_\_\_\_\_  
Date

\_\_\_\_\_  
Primary Researcher’s Signature (please print)

\_\_\_\_\_  
Date

Thank you for your participation!

\_\_\_\_\_  
Primary Researcher’s Signature (please print)

\_\_\_\_\_  
Date

Tel: xxx-xxx-xxxx

Fax: xxx-xxx-xxxx

drew.research@yahoo.com

Appendix D: Transcriber Confidentiality Agreement

As a transcriptionist, I agree to maintain strict confidentiality with regard to all participant information and content within the audiotapes that I transcribe. I agree to keep the CDs and transcripts in a locked filing cabinet or safe when they are not in use by me. I will also help to aid the researcher in protecting the identity of all participants to ensure anonymity.

Please type in your name below and include in the subject line of the return e-mail: “(Your name) signs Transcriber confidentiality agreement for wisdom study.”

\_\_\_\_\_  
Transcriber’s Signature

\_\_\_\_\_  
Date

\_\_\_\_\_  
Researcher’s Signature

\_\_\_\_\_  
Date



## Appendix E: Web Host Confidentiality Agreement

As an employee of the research-based Web host, Multiple Angles for Creative Solutions, I agree to maintain strict confidentiality with regard to all participant information and content within any stage of the research process including collection and transit. I attest that the server being used for this research has an SSL security layer, making the data safe from simple hijacking. I agree to keep data CD's in a locked filing cabinet or safe when they are not in use by me. I will also help to aid the researcher in protecting the identity of all participants to ensure anonymity.

Please type in your name below and include in the subject line of the return e-mail: "(Your name) signs Web host confidentiality agreement for wisdom study."

---

Web host's Signature

---

Date

---

Researcher's Signature

---

Date

## Appendix F: Online Survey Demographic Questions for Participants

**Directions:** Please answer all of the questions to the best of your ability. If you have any questions, please contact lead researcher, Drew Krafcik at xxx-xxx-xxxx or e-mail (drew.research@yahoo.com).

Participant Identification Number (e.g., “N 1”) \_\_\_\_\_

Current Residence (city, state): \_\_\_\_\_

Gender: \_\_\_\_\_

Sex: \_\_\_\_\_

Ethnicity or ethnicities identified with: \_\_\_\_\_

Place of birth: \_\_\_\_\_

Age \_\_\_\_\_

Relationship status (e.g., single, married, divorced, significant other/partner, widowed, vowed religious): \_\_\_\_\_

Number of children: \_\_\_\_\_

Total number of years of education (e.g., high school = 12, high school + 4-year college = 16, etc.): \_\_\_\_\_

List Degrees Earned: \_\_\_\_\_

Current religious and/or spiritual tradition: \_\_\_\_\_

Do you have a religious/spiritual practice?: (yes/no) \_\_\_\_\_

If yes, description of practice and years

practicing: \_\_\_\_\_

Current Occupations / Employment and approximate number of years practicing in each profession/occupation: (i.e., mechanic, architect, teacher, spiritual/pastoral counselor,

psychotherapist) \_\_\_\_\_

\_\_\_\_\_

Previous Occupations / Employment and approximate number of years practicing in

each: \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

Current health status: Excellent \_\_\_\_\_ Good \_\_\_\_\_ Fair \_\_\_\_\_ Poor \_\_\_\_\_

Current socioeconomic status: Excellent \_\_\_\_\_ Good \_\_\_\_\_ Fair \_\_\_\_\_ Poor \_\_\_\_\_

## Appendix G: Nominator Initial Communication

Dear Potential Participant,

I am writing to ask for your participation in my research. Your assistance will allow me to complete my dissertation and to fulfill the last requirements for my doctoral degree. I deeply respect the value of your time and appreciate your willingness to consider taking part.

My dissertation explores the lives, opinions, and characteristics of purported exemplars of wisdom. In light of the daunting crises that face the global community and wisdom's potential for human flourishing, contributions can be made not only to the psychological study of wisdom but also the greater human community. Your converging backgrounds of pastoral/spiritual care, psychotherapy/counseling, and teaching offer valuable expertise relevant for this endeavor.

The total time investment is likely 2-3 hours. Principally, you will be asked to identify between two and five exemplars of wisdom that you know personally. If you believe yourself to be one of the five wisest exemplars, you are invited to include your name. You are then asked to: a) name the two wisest exemplars and provide contact information for them b) fill out a measure of wisdom characteristics that seems to reflect his/her qualities, and c) write a one-page description of why he/she is an exemplar of wisdom. A demographic questionnaire will also be presented for your completion.

Any personal information that you share with me will be kept strictly confidential. The only exception to this policy is the request to use your name when contacting the top two exemplars that you nominated. Please see the enclosed informed consent form for more details.

If you are willing to participate, please sign by typing your name on the enclosed consent form and e-mail it back to [drew.research@yahoo.com](mailto:drew.research@yahoo.com). You may also fax (650-xxx-xxxx) or mail it back to me. Your typed name will serve as your electronic signature along with the email that I receive back from you.

Please also include the names of your nominees, especially the two wisest, and I will provide you with a secure link to fill out the measures and write the one-page reflections.

If you have any questions or concerns please contact me at (650) xxx-xxxx. You may also contact my dissertation chair, Shani Robins, Ph.D., at (858) xxx-xxxx. Thank you in advance for supporting me in this research.

Warmly,

Drew Krafcik, M.A.  
Doctoral Student  
Institute of Transpersonal Psychology  
[drew.research@yahoo.com](mailto:drew.research@yahoo.com)

## Appendix H: Nominator: Follow-Up Communication and Instruction

Dear Nominator,

Thank you for your willingness to take part in my exemplars of wisdom research study. I really appreciate your time and interest.

**Participant Number:** For the remainder of the study, your participant number will be [specified number]. Please remember this number as it will be the number you use to refer to yourself on all assessments and forms.

### **Questionnaire Completion**

Please log onto [secure website] and enter your participant number as your username. Complete the questionnaire and two one-page reflections. (You may write your reflections in a word document and paste them onto the Web site). It is very important to the success of this study that you complete all information by [specified date]. The total required time is about 2 to 3 hours.

Please do not hesitate to call me with any questions or concerns (650) xxx-xxxx. You may e-mail or call me and leave your name, phone number, and times to reach you on the voicemail, and I will promptly return your call.

Thank you again very much for your time and efforts in helping me with this research project.

Warmly,

Drew Krafcik, M.A.  
Doctoral Student  
Institute of Transpersonal Psychology  
drew.research@yahoo.com

## Appendix I: Nominator Thank You

Dear Nominator,

Thank you so much for your participation in my research, and for nominating [first name] and [first name]. I so appreciated the opportunity to correspond with and learn from you all. (to be expanded)

Warmly,

Drew Krafcik, M.A.  
Doctoral Student  
Institute of Transpersonal Psychology  
drew.research@yahoo.com

## Appendix J: Exemplar Initial Communication

Dear Potential Participant,

You have been nominated by \_\_\_\_\_ to participate in a study that explores the lives, opinions, and characteristics of wisdom exemplars. The daunting crises that face the global community and wisdom's potential for human flourishing seem to make it an apropos topic for consideration.

As a doctoral student at the Institute of Transpersonal Psychology, I am hoping to offer a contribution to the psychological study of wisdom as well as examine its potential applications to the greater human community.

The total required time for your participation, should you choose, is approximately 1.5 to 3 hours. Principally, you will be asked to complete an online survey of multiple-choice items that should take about 75 to 90 minutes. A demographic questionnaire will also be presented for your personal review and completion within the survey. I ask that the entire online form be completed within 2 to 3 weeks.

With your permission, I might also be contacting you for a 60-90 minute interview (included in the 1.5 to 3 hour total time) at a neutral location and at a time suitable for us both. Any personal information that you share with me will be kept strictly confidential. See the enclosed informed consent form for more details.

If you are willing to participate, please sign by typing in your name on the enclosed consent form and e-mail it to [drew.research@yahoo.com](mailto:drew.research@yahoo.com). You may also fax (650-xxx-xxxx) or mail it back to me. Your typed name along with your e-mail reply to me will serve as your consent. I will then provide you with a secure link to complete the questionnaire.

If you have any questions or concerns please contact me at (650) xxx-xxxx. You may also contact my dissertation chair, Shani Robins, Ph.D., at (858) xxx-xxxx.

Thank you in advance for supporting me in this research.

Warmly,

Drew Krafcik, M.A.  
Doctoral Student  
Institute of Transpersonal Psychology  
[drew.research@yahoo.com](mailto:drew.research@yahoo.com)

## Appendix K: Exemplar Follow-Up Communication and Instruction

Dear Exemplar,

Thank you for your willingness to take part in my research study. I really appreciate your time and interest.

**Participant Number:** For the remainder of the study, your participant number will be [specified number, i.e., EX 1]. Please remember this number as it will be the number you use to refer to yourself on all assessments and forms.

### **Questionnaire Completion**

Please log onto [secure Web site] and enter your participant number as your username. Complete the questionnaire. It is very important to the success of this study that you complete the questionnaire by [specified date]. The required time is about 75 to 90 minutes.

Please do not hesitate to call me with any questions or concerns at (650) xxx-xxxx. You may e-mail or call me and leave your name, phone number, and times to reach you on the voicemail, and I will promptly return your call.

Thank you again very much for your time and efforts in helping me with this dissertation research project.

Warmly,

Drew Krafcik, M.A.  
Doctoral Student  
Institute of Transpersonal Psychology  
drew.research@yahoo.com



## Appendix L: Exemplar: Interview Selection Letter

Dear Exemplar:

Thank you again for participating in this research.

I am pleased to inform you that you have been selected to participate in the interview section of this study. If you choose to take part in this section, I would like to schedule a neutral location and time with you of no more than 90 minutes for a face-to-face interview to get a deeper sense of your opinions and reflections. During the interview, if there are any questions that you do not feel like answering, you have the option not to answer.

Please remember that your identity will be kept anonymous during this process and all communications will be kept confidential. Please let me know by [specified date] if you would like to be a part of this section of the study.

If you choose to volunteer for this section, please email me (or call (650) xxx-xxxx) with a few times and locations that would work for you to be interviewed. I have an office in Redwood City, CA and Palo Alto, CA that can also be used for the interview should that be best for you.

Thank you again for your invaluable contribution to this study and I look forward to hearing back from you.

Warmly,

Drew Krafcik, M.A.  
Doctoral Student  
Institute of Transpersonal Psychology  
drew.research@yahoo.com

## Appendix M: Exemplar Thank You

Dear Exemplar Name,

Thank you so much for your participation in my research. I so appreciated the opportunity to correspond with and learn from you.

(Expand and personalize for each exemplar)

Warmly,

Drew Krafcik, M.A.  
Doctoral Student  
Institute of Transpersonal Psychology  
drew.research@yahoo.com

## Appendix N: Semi-Structured Interview Questions

## Lives, Opinions of Wisdom, Wisdom-Related Qualities/Characteristics

Directions: “Please offer your personal opinions and indicate when religious/spiritual traditions are invoked.”

What is your life like?

How did you come to be the way you are?

As you look back to your childhood, what do you see as kind of a prediction about how you would be in later life?

How is there a thread through your life events that led you to today?

What’s our role in this time?

What are you doing for the common good? What kind of work do you do?

What are your values?

What are your decision-making strategies?

What concerns do you have, if any?

What makes you anxious, if anything?

What is most meaningful to you?

What are your relationships like? What are your friendships like?

What are your spiritual perspectives?

Is there a “spiritual path” you would suggest?

What significant spiritual experiences did you have along the way?

How do you define wisdom?

What do you think is most important to share about your experience of so called wisdom?

Can wisdom be taught?

Can wisdom be learned?

How might you facilitate this?

What personal components might facilitate its emergence and make it more accessible?

What conditions might facilitate its emergence and make it more accessible?

Who do you consider to be wise?

Can you describe one or more times in your life in which you believe you were wise, or acted wisely?

What's the biggest misunderstanding you hear about the notion of wisdom?

Where do you "go" to find your answers about wisdom?

Anything else that you feel is important to add?