Lifestyle Assessments, Appraisals, & Inventories

A collection of assessment tools taken from the *Structured Exercises in Stress Management* and *Wellness Promotion* series

Whole Person Associates
People are usually more willing to engage in the hard work of lifestyle change after they’ve examined their own lives and realized that change is needed. Rather than moving directly to instruction, it’s often better to provide participants with an assessment tool and a process for considering their current situation.

This collection of lifestyle assessments, appraisals and inventories will help your audience identify their current lifestyle choices and evaluate their state of well-being. Each assessment tool is part of a complete exercise that will motivate participants in your groups to make healthful changes.

**Contents**

3 Whole Person Health Appraisal
8 Health Transcript
11 Relationship Report Card
15 Chemical Independence
20 That’s the Spirit
23 Self-Esteem Grid
29 Job Motivators
36 My Present Health Status
39 Caring Appraisal
43 Personal Fitness Check
48 The Hardiness Factor
53 Spice or Arsenic
57 Sick of Change
66 On the Job Stress Grid
73 Fourth Source of Stress
78 Stress Symptom Inventory
81 Workaholism
89 Coping Skills Assessment
93 Sticks and Stones
The activities in this book were selected from 360 exercises contained in the ten volumes of Structured Exercises in Stress Management and Structured Exercises in Wellness Promotion, edited by Nancy Loving Tubesing and Donald A. Tubesing. Call for a catalog describing hundreds of resources or visit our Web site, www.wholeperson.com.

Reproduction Policy
Copyright © 2001 by Whole Person Associates, Inc.

Your purchase of this book entitles you to reproduce the worksheets that appear in the book for your education/training purposes. The Whole Person copyright statement must be retained on each page.

Prior written permission is required for reproduction of a complete or adapted exercise with trainer instructions or for inclusion of material in another publication.
Whole Person Health Appraisal

In this novel health appraisal process, participants draw on their own wisdom to assess their level of physical, mental, emotional, social, spiritual and lifestyle health. Participants then identify their personal health risk areas.

Goals
To raise participants’ consciousness about the many aspects of health.
To appraise personal well-being from a whole person perspective.
To identify personal health risk factors in a variety of life dimensions.

Time frame
20–30 minutes

Materials needed
Whole Person Health Appraisal and Risk Factors worksheets for each participant.

Process
1. Introduce the concept of health appraisals and risk factors, describing the traditional health risk appraisal and contrasting the whole person appraisal process. During this chalktalk, you may want to include some or all of these ideas:
   ■ The traditional health risk appraisal focuses specifically on areas of health and risk in which researchers can provide quantifiable data.
   ■ Such appraisals rely on statistical correlations between death rates (or illness/accident incidence) and quantifiable physical qualities and habits.
   ■ The whole person appraisal offers another way to view health and risk factors. This appraisal taps into the internal wisdom of the individual rather than external data and focuses on all dimensions of well-being (including mental, emotional, social, spiritual and lifestyle issues), rather than primarily the physical.
   ■ Both types of appraisal provide feedback regarding personal risk factors as well as recommended actions a person can adopt to increase the probability of a longer, more satisfying life.

2. Distribute the Whole Person Appraisal worksheets and give instructions for completing the first part of the worksheet.
First consider your physical health. Look at the items in the physical portion of the appraisal.

- **Circle** anything that is a cause for concern in your life.
- **Star** those items that signal wellness in your life.

Encourage people to add any additional significant qualities or attributes that occur to them.

3. Lead participants through the other five dimensions of the health assessment, describing each as you go along and allowing time for the circling and starring of appropriate items.

4. When everyone is finished, ask participants to reflect on the quality of their health in each separate dimension and to fill in the thermometer for each dimension, according to their judgment of their current health status in that area.

After participants have completed the mental, emotional, social, spiritual and lifestyle thermometers, they will have an overall picture of their whole person wellness in thermometer form.

5. Distribute the **Risk Factor** worksheet to participants and direct them to focus on potential risk factors in each dimension of well-being.

- Identify one or more personal attitudes or habits in each dimension that increases your risk of future disease.

  A “risk factor” is defined as any attribute, attitude, habit or behavior pattern that, if continued, is likely to cause problems and decrease the quality of your life in the future.

6. Ask participants to pair up with a neighbor, then give instructions for the consultation process.

- You and your partner will act as personal whole person health consultants for one another. Decide who will act as consultant first. The other partner will be the client first.

- **Clients,** begin by describing your **Whole Person Health Appraisal** to your partner/consultant. You will have about 5 minutes to tell your story and to identify 2 or 3 **Personal Risk Factors** that you would like to change.

- **Your consultant** will then have five minutes to interview you further and help you formulate a plan of action that will reduce these risk factors.

  Keep time for the group. Five minutes may seem like a long time for clients to share, but the value of insights is often directly related to the depth of reflection at this point. If necessary, remind consultants to “listen only” until the five-minute mark. After five minutes, interrupt and repeat the instructions for the consultants.

7. The partners switch roles (client becomes consultant) and repeat Step 6.
WHOLE PERSON HEALTH APPRAISAL

Circle the items with which you are not satisfied at present. Star the items that signal your wellness.

### PHYSICAL
- smoking
- caffeine intake
- alcohol use
- medication
- weight
- physical pain
- sexual satisfaction
- exercise
- energy
- body tension
- body image
- other
- stamina
- sleep patterns
- diet habits
- strength
- general health
- attention I pay to my body

### MENTAL
- alertness
- poetic vision
- memory
- enthusiasm
- creativity
- know my field
- wise
- stimulating
- new ideas
- open-minded
- capable
- other
- logical
- consistent
- curiosity
- logical

### EMOTIONAL
- depressed
- often anxious
- can express feelings
- happy
- stability
- often scared
- can accept feelings
- independence
- sensitive
- self-confidence
- meet my own needs
- content
- grieving
- feel secure
- in touch with me
- other
- freedom
- self-control
- sense of success
- freedom

### SOCIAL
- friendship
- handle conflict
- meet people with ease
- affectionate
- intimacy
- social graces
- express needs to others
- polite
- outgoing
- conversation ease
- respond to others' needs
- entertaining
- respect
- able to say “no”
- relationship with spouse
- relationship with kids
- dependence
- honesty
- loyal/trusting
- relationship with parents
- other
- tolerant
- helpful
- forgiveness
- other

### SPIRITUAL
- hope
- positive view
- comfort with my death
- commitment
- meaning
- feel forgiven
- worthwhileness
- direction
- purpose
- good example
- in touch with God
- surrender
- values
- worship life
- sharing faith
- other
- faith
- at peace
- prayer/meditation
- faith

### LIFESTYLE
- habits
- moved recently
- comfortable with aging
- able to play
- priorities
- going too fast
- manage money well
- goal setting
- courageous
- trying too hard
- appreciate beauty
- successful
- satisfied
- able to relax
- job satisfaction
- other
- orderliness
- able to enjoy
- decision making
- other

Copyright © 2002 Whole Person Associates 210 W Michigan, Duluth MN 55802 800-247-6789
MY STATE OF HEALTH
Thermometer

Physical
Mental
Emotional
Social
Lifestyle

Perfect
Excellent
Adequate
Room for Improvement
Holds Me Back
Poor
Critical

FILL UP MERCURY TO APPROPRIATE LEVELS
**My Personal Risk Factors**

What factors in your current health picture and self-care pattern are presently causing difficulty in your life or are likely to cause problems in the future?

What patterns, if continued, will diminish the quality of your life one year from now? Ten years from now?

<table>
<thead>
<tr>
<th>Physical</th>
</tr>
</thead>
</table>

<table>
<thead>
<tr>
<th>Mental</th>
</tr>
</thead>
</table>

<table>
<thead>
<tr>
<th>Emotional</th>
</tr>
</thead>
</table>

<table>
<thead>
<tr>
<th>Social</th>
</tr>
</thead>
</table>

<table>
<thead>
<tr>
<th>Spiritual</th>
</tr>
</thead>
</table>

<table>
<thead>
<tr>
<th>Lifestyle</th>
</tr>
</thead>
</table>