

SELF-REPORT INSTRUMENT · ENGLISH EDITION

ITM Assessment Battery

A Comprehensive Self-Report Instrument for Assessing
Transpersonal Development and Shadow Integration

INTEGRATIVE TRANSFORMATION MODEL

Prof. Luis Miguel Gallardo

World Happiness Foundation & Shoolini University – Yogananda

School of Spirituality and Happiness

lgallardo@worldhappiness.foundation

ORCID

[0009-0005-3222-6092](https://orcid.org/0009-0005-3222-6092)

© 2024 Prof. Luis Miguel Gallardo. All rights reserved. No part of this instrument may be reproduced, distributed, or transmitted in any form without prior written permission from the copyright holder.

01 Overview and Purpose

The ITM Assessment Battery comprises two complementary instruments designed to evaluate psychological development and shadow integration within the Integrative Transformation Model (ITM) framework. Together, these instruments provide a comprehensive profile of an individual's developmental stage and the degree to which seven core mechanisms of transformation are actively engaged.

ITM Stage Assessment

The ITMSA is a 50-item self-report scale assessing developmental stage across the five ITM stages: (1) Unconscious Reactivity, (2) Conscious Recognition, (3) Active Integration, (4) Embodied Wisdom, and (5) Transcendent Integration. Each stage is assessed by ten items rated on a 5-point Likert scale (1 = Never, 5 = Always). Convergent validity has been established with the Washington University Sentence Completion Test (WUSCT; Loevinger, 1976) and the Post-Conventional Personality Assessment (PCPA; Cook-Greuter, 2000).

ITM Mechanism of Integration Inventory

The ITMMI is a 70-item self-report inventory assessing the engagement of seven mechanisms of shadow integration: (1) Recognition, (2) Witnessing, (3) Intention Discovery, (4) Symbolic Integration, (5) Embodied Practice, (6) Relational Mirroring, and (7) Meaning-Making. Each subscale contains ten items. Psychometric validation (N = 250) has demonstrated strong internal consistency ($\alpha = .82-.91$) and acceptable test-retest reliability ($r = .78-.86$, 4-week interval). Convergent validity has been established with the Five Facet Mindfulness Questionnaire (FFMQ; Baer et al., 2006) and the Self-Compassion Scale (SCS; Neff, 2003).

Clinical and Research Applications

The ITM Assessment Battery is intended for use in clinical practice, research, and educational contexts. Clinicians may use the battery to establish a developmental baseline at intake, to monitor progress across the stages of the ITM, and to identify the specific integration mechanisms most in need of support. Researchers may use the battery as a validated instrument for studying transpersonal development, shadow integration, and post-conventional psychological functioning. Educational programs in transpersonal psychology, clinical psychology, and contemplative studies may use the battery for self-assessment and reflective practice within training curricula. For access, permissions, and licensing inquiries, contact: lgallardo@worldhappiness.foundation

02 General Administration Instructions

Time Required	Part I (ITMSA): approximately 15–20 minutes. Part II (ITMMI): approximately 20–25 minutes. Combined battery: approximately 35–45 minutes.
Setting	Administer in a quiet, private environment free from interruptions. The battery may be completed individually or in a facilitated group setting. Online administration is supported with validated digital formats.
Instructions to Respondents	Read each statement carefully and indicate how accurately it describes your typical experience. Use the following scale: 1 = Never, 2 = Rarely, 3 = Sometimes, 4 = Often, 5 = Always. There are no right or wrong answers. Please respond based on your genuine experience rather than how you think you should respond or how you would like to be. For the most accurate profile, complete all items in a single sitting without interruption.

Scoring	Detailed scoring instructions, normative data, and stage profile interpretation are provided in the Scoring Guides following each instrument section. Stage 1 items on the ITMSA are reverse-scored. Raw subscale scores are converted to T-scores using the normative tables provided. For clinical interpretation, use the Stage Profile and Mechanism Profile in conjunction with clinical observation and other assessment data.
Confidentiality	Responses should be treated with strict confidentiality. In clinical settings, results should be discussed with the clinician or supervisor who administered the battery. In research settings, all data should be anonymized in accordance with applicable ethical guidelines.
Access and Permissions	This instrument is protected by copyright. Use in clinical practice or research requires prior written permission from Prof. Luis Miguel Gallardo. Contact: lgallardo@worldhappiness.foundation

ITM Stage Assessment

ITMSA · 50 items

Instructions: Read each statement carefully and rate how accurately it describes your typical experience using the scale below. There are no right or wrong answers.

1 = NEVER 2 = RARELY 3 = SOMETIMES 4 = OFTEN 5 = ALWAYS

STAGE 01 · ITEMS 1-10

Unconscious Reactivity

Items 1–10 assess the degree to which unconscious, automatic patterns dominate the individual’s psychological functioning. Higher scores on these items (where 1 = Never and 5 = Always) reflect greater reactivity and less integration. Note: these items are reverse-scored in the Stage Profile calculation.

#	ITEM STATEMENT	1 NEVER	2 RARELY	3 SOMETIMES	4 OFTEN	5 ALWAYS
1	I react automatically to situations without pausing to reflect.	☐	☐	☐	☐	☐
2	When things go wrong, I tend to blame circumstances or other people.	☐	☐	☐	☐	☐
3	My emotions feel overwhelming and difficult to manage.	☐	☐	☐	☐	☐
4	I am generally unaware of repeating patterns in my behavior.	☐	☐	☐	☐	☐
5	My inner life feels chaotic or confusing to me.	☐	☐	☐	☐	☐
6	I act on impulse without considering the consequences.	☐	☐	☐	☐	☐
7	My sense of who I am shifts depending on the situation or who I am with.	☐	☐	☐	☐	☐
8	I find it difficult to observe myself from a distance when I am upset.	☐	☐	☐	☐	☐
9	Strong emotional reactions take over before I have a chance to think.	☐	☐	☐	☐	☐
10	I rarely connect my current reactions to past experiences or patterns.	☐	☐	☐	☐	☐

STAGE 02 · ITEMS 11–20

Conscious Recognition

Items 11–20 assess the emergence of metacognitive awareness, self-observation, and the capacity to name and recognize recurring patterns. Higher scores indicate greater conscious recognition of inner dynamics.

#	ITEM STATEMENT	1 NEVER	2 RARELY	3 SOMETIMES	4 OFTEN	5 ALWAYS
11	I can observe my thoughts without being overwhelmed by them.	☐	☐	☐	☐	☐
12	I am able to name recurring emotional or behavioral patterns in myself.	☐	☐	☐	☐	☐
13	I notice when I am reacting and can pause to reflect before responding.	☐	☐	☐	☐	☐
14	I recognize that some of my criticisms of others may reflect unacknowledged parts of myself.	☐	☐	☐	☐	☐
15	I can distinguish between my immediate emotional reactions and my core values.	☐	☐	☐	☐	☐
16	I feel curious about the underlying causes of my emotional responses.	☐	☐	☐	☐	☐
17	I notice when my mood or behavior has changed and can identify possible reasons.	☐	☐	☐	☐	☐
18	I am aware of the impact my emotional states have on those around me.	☐	☐	☐	☐	☐
19	I can identify specific situations or people that reliably trigger strong reactions in me.	☐	☐	☐	☐	☐
20	I recognize that patterns I dislike in others may also exist within myself.	☐	☐	☐	☐	☐

STAGE 03 · ITEMS 21–30

Active Integration

Items 21–30 assess deliberate engagement with shadow material, use of the Seeing–Grounding–Embodying (S-G-E) process, and the capacity to tolerate and transform psychological distress. Higher scores indicate active, disciplined inner work.

#	ITEM STATEMENT	1 NEVER	2 RARELY	3 SOMETIMES	4 OFTEN	5 ALWAYS
21	I deliberately engage with difficult or uncomfortable aspects of myself.	☐	☐	☐	☐	☐
22	I can stay with emotional discomfort long enough to learn from it.	☐	☐	☐	☐	☐
23	I work actively to transform reactive patterns I have identified in myself.	☐	☐	☐	☐	☐
24	I engage in regular practices (journaling, therapy, meditation) to explore my inner life.	☐	☐	☐	☐	☐
25	When a shadow aspect arises, I try to understand its protective function rather than suppress it.	☐	☐	☐	☐	☐
26	I use a structured process (e.g., Seeing–Grounding–Embodying) for engaging shadow material.	☐	☐	☐	☐	☐
27	I can differentiate between ego-driven reactions and deeper wisdom when making decisions.	☐	☐	☐	☐	☐
28	I notice when a part of me is acting out and take deliberate steps to integrate it.	☐	☐	☐	☐	☐
29	My inner work has led to observable changes in my behavior and relationships.	☐	☐	☐	☐	☐
30	I approach my own psychological complexity with disciplined curiosity rather than avoidance.	☐	☐	☐	☐	☐

STAGE 04 · ITEMS 31–40 Embodied Wisdom

Items 31–40 assess the consolidation of integrated qualities as stable character traits, the transformation of shadow into resource, and sustained behavioral change under stress. Higher scores indicate embodied, durable transformation.

#	ITEM STATEMENT	1 NEVER	2 RARELY	3 SOMETIMES	4 OFTEN	5 ALWAYS
31	Compassion and equanimity feel like stable qualities in my daily life, not just occasional states.	☐	☐	☐	☐	☐
32	I experience previously feared aspects of myself as sources of insight and strength.	☐	☐	☐	☐	☐
33	Changes resulting from inner work persist even in stressful or challenging situations.	☐	☐	☐	☐	☐
34	My relationships reflect the inner transformations I have undergone.	☐	☐	☐	☐	☐
35	I extend the same compassion to myself that I would offer to someone I care about.	☐	☐	☐	☐	☐
36	I can hold tension between opposing perspectives without needing to resolve it prematurely.	☐	☐	☐	☐	☐
37	My sense of identity feels stable regardless of external circumstances.	☐	☐	☐	☐	☐
38	I integrate insights from inner work naturally and spontaneously into everyday life.	☐	☐	☐	☐	☐
39	Shadow material that once felt threatening now feels like a resource I can access.	☐	☐	☐	☐	☐
40	Others notice and comment on the equanimity and groundedness I demonstrate.	☐	☐	☐	☐	☐

STAGE 05 • ITEMS 41–50 **Transcendent Integration**

Items 41–50 assess the emergence of nondual awareness, stable essential nature, transpersonal motivation, and the dissolution of rigid self-other boundaries. Higher scores indicate development toward transcendent integration and post-conventional functioning.

#	ITEM STATEMENT	1 NEVER	2 RARELY	3 SOMETIMES	4 OFTEN	5 ALWAYS
41	I experience a stable sense of awareness that persists beneath changing thoughts and emotions.	☐	☐	☐	☐	☐
42	I can hold opposites — light and shadow, joy and grief — as expressions of a deeper wholeness.	☐	☐	☐	☐	☐
43	My sense of self extends beyond personal identity to a felt sense of interconnection with others.	☐	☐	☐	☐	☐
44	I am motivated by a genuine desire to contribute to the wellbeing of others beyond personal gain.	☐	☐	☐	☐	☐
45	I experience a spacious awareness that is not disturbed by the arising of difficult content.	☐	☐	☐	☐	☐
46	Nondual or unitive experiences occur naturally and are not confined to formal meditation.	☐	☐	☐	☐	☐
47	My sense of purpose feels grounded in something larger than my personal story.	☐	☐	☐	☐	☐
48	I engage with suffering — my own and others' — with equanimity rather than avoidance or reactivity.	☐	☐	☐	☐	☐
49	The distinctions between self and other feel less rigid without losing a functional sense of identity.	☐	☐	☐	☐	☐
50	I experience essential qualities (presence, clarity, love, strength) as stable dimensions of who I am.	☐	☐	☐	☐	☐

I ITMSA Scoring Guide

Scoring Procedure

- 01
- Reverse-score all Stage 1 items (Items 1–10): subtract each raw score from 6 (e.g., a raw score of 1 becomes 5; a raw score of 5 becomes 1).
- 02
- Sum the (reverse-scored) items within each stage to obtain a raw subscale score (range: 10–50 per stage).
- 03
- Identify the stage with the highest raw score as the Dominant Stage. Where two stages score within 3 points of each other, the individual is considered to be in Transition between those stages.
- 04
- Convert raw subscale scores to T-scores using the normative table below (based on the standardization sample; N = 250). T-scores with a mean of 50 and SD of 10 allow comparison across stages and with normative data.

Stage Profile Formula: Dominant Stage = argmax(Stage 1R, Stage 2, Stage 3, Stage 4, Stage 5)

STAGE PROFILE SCORING TABLE

ST.	STAGE NAME	ITEMS	RAW SCORE (10–50)	T-SCORE MEAN (SD)	INTERPRETATION
1	Unconscious Reactivity	1–10 (R)	_____	48.2 (9.4)	Higher = less integrated (reverse-scored)
2	Conscious Recognition	11–20	_____	50.1 (10.2)	Emerging metacognitive awareness
3	Active Integration	21–30	_____	49.8 (9.8)	Active engagement with shadow material
4	Embodied Wisdom	31–40	_____	50.4 (10.1)	Stable, embodied transformation
5	Transcendent Integration	41–50	_____	49.6 (10.3)	Nondual, post-conventional functioning
TOTAL ITMSA SCORE		1–50	_____	—	Sum of T-scores; higher = greater integration

Note. (R) = reverse-scored. Raw scores for Stage 1 must be reverse-scored before summing.

STAGE INTERPRETATION GUIDELINES

T-SCORE RANGE	CLASSIFICATION	CLINICAL IMPLICATION
T ≥ 65	Very High	Strong, reliable engagement at this stage; may serve as resource
T = 55-64	High	Consistent engagement; well-developed stage characteristics
T = 45-54	Average	Stage characteristics present but variable; consolidation in progress
T = 35-44	Low	Stage characteristics emerging; targeted support indicated
T ≤ 34	Very Low	Minimal stage characteristics; prior stage work recommended

ITM Mechanism of Integration Inventory

ITMMI · 70 items

Instructions: Read each statement carefully and rate how accurately it describes your typical experience using the scale below. There are no right or wrong answers.

1 = NEVER 2 = RARELY 3 = SOMETIMES 4 = OFTEN 5 = ALWAYS

SUBSCALE M1 · ITEMS 1–10

Recognition

Items 1–10 assess the capacity to recognize, observe, and name reactive patterns, triggers, and shadow activations in real time. Higher scores indicate greater discriminative awareness at the moment of reactivity.

#	ITEM STATEMENT	1 NEVER	2 RARELY	3 SOMETIMES	4 OFTEN	5 ALWAYS
1	I catch myself in reactive behaviors and can pause before continuing.	☐	☐	☐	☐	☐
2	I can identify the specific triggers that activate my strongest emotional responses.	☐	☐	☐	☐	☐
3	I notice physical sensations in my body that signal the onset of a reactive state.	☐	☐	☐	☐	☐
4	I recognize recurring patterns in my behavior across different relationships and contexts.	☐	☐	☐	☐	☐
5	I can observe the moment a shadow aspect is activated without being fully swept away.	☐	☐	☐	☐	☐
6	I distinguish between the intensity of a reaction and the actual significance of the situation.	☐	☐	☐	☐	☐
7	I notice when I am projecting my own unacknowledged qualities onto others.	☐	☐	☐	☐	☐
8	I identify the specific emotions underlying broad reactive states (e.g., anger masking fear).	☐	☐	☐	☐	☐
9	I recognize the gap between what I feel and what I say or do in interpersonal situations.	☐	☐	☐	☐	☐
10	I notice when habitual defenses (intellectualizing, avoidance, humor) arise in response to discomfort.	☐	☐	☐	☐	☐

SUBSCALE M2 · ITEMS 11–20

Witnessing

Items 11–20 assess the development and stability of a non-judgmental, observing awareness that can hold psychological content without identification or suppression. Higher scores reflect a more stable and accessible witnessing capacity.

#	ITEM STATEMENT	1 NEVER	2 RARELY	3 SOMETIMES	4 OFTEN	5 ALWAYS
11	I can observe my thoughts and emotions from a place of non-judgmental awareness.	☐	☐	☐	☐	☐
12	I maintain an inner witness perspective even when emotional content is intense.	☐	☐	☐	☐	☐
13	I experience moments of pure observing awareness that are distinct from the content being observed.	☐	☐	☐	☐	☐
14	I can observe painful material without immediately trying to fix, suppress, or escape it.	☐	☐	☐	☐	☐
15	My witnessing capacity remains available even when I am under significant stress.	☐	☐	☐	☐	☐
16	I can simultaneously experience an emotion and observe myself having that emotion.	☐	☐	☐	☐	☐
17	The quality of my inner observation is characterized by curiosity rather than judgment.	☐	☐	☐	☐	☐
18	I can witness reactive states in myself without identifying with them as “who I am.”	☐	☐	☐	☐	☐
19	My ability to witness my inner life extends naturally into witnessing others with compassion.	☐	☐	☐	☐	☐
20	I experience witnessing as an active, engaged stance rather than passive detachment.	☐	☐	☐	☐	☐

SUBSCALE M3 · ITEMS 21–30

Intention Discovery

Items 21–30 assess the capacity to identify the underlying protective intention or adaptive function of shadow material, and to extend compassion toward these inner dynamics. Higher scores indicate greater depth of understanding of one’s shadow and defensive structures.

#	ITEM STATEMENT	1 NEVER	2 RARELY	3 SOMETIMES	4 OFTEN	5 ALWAYS
21	I can identify the underlying intention or protective function of a reactive pattern.	☐	☐	☐	☐	☐
22	I extend compassion to the part of me that developed a shadow quality as a survival strategy.	☐	☐	☐	☐	☐
23	I can recognize the hidden gifts or strengths embedded in shadow material.	☐	☐	☐	☐	☐
24	I understand how early experiences shaped the defensive patterns I now carry.	☐	☐	☐	☐	☐
25	I can engage dialogically with inner sub-personalities or parts to understand their intent.	☐	☐	☐	☐	☐
26	When I encounter a defensive behavior, I ask what it is protecting rather than condemning it.	☐	☐	☐	☐	☐
27	I recognize that shadow qualities often carry the seed of their transformative opposite.	☐	☐	☐	☐	☐
28	I can move from judgment of a shadow quality to curiosity about its origin and function.	☐	☐	☐	☐	☐
29	Discovering the positive intention behind a shadow aspect changes my relationship to it.	☐	☐	☐	☐	☐
30	I approach my own defenses and resistances as wise adaptations worthy of understanding.	☐	☐	☐	☐	☐

SUBSCALE M4 • ITEMS 31–40 Symbolic Integration

Items 31–40 assess the use of symbolic, imaginal, and expressive modalities (dreams, active imagination, archetypal imagery, creative arts) as vehicles for engaging and integrating unconscious material. Higher scores reflect active symbolic work.

#	ITEM STATEMENT	1 NEVER	2 RARELY	3 SOMETIMES	4 OFTEN	5 ALWAYS
31	I work with dreams to understand unconscious patterns and shadow material.	☐	☐	☐	☐	☐
32	I use active imagination or inner dialogue to engage with symbolic images and figures.	☐	☐	☐	☐	☐
33	I recognize archetypal themes (e.g., Shadow, Anima/Animus, Self) in my personal narrative.	☐	☐	☐	☐	☐
34	I engage with creative or expressive arts (writing, drawing, movement) as vehicles for inner work.	☐	☐	☐	☐	☐
35	I can interpret personal symbols or metaphors that arise spontaneously in imagery or dreams.	☐	☐	☐	☐	☐
36	Symbolic material from dreams or imagination has directly informed my psychological growth.	☐	☐	☐	☐	☐
37	I approach mythological or archetypal stories as mirrors for my own inner dynamics.	☐	☐	☐	☐	☐
38	I can work with the symbolic language of the body (gesture, posture, movement) in inner work.	☐	☐	☐	☐	☐
39	Engaging with symbolic material has helped me integrate aspects of myself that were previously unconscious.	☐	☐	☐	☐	☐
40	I find meaning in synchronicities and meaningful coincidences as potential carriers of symbolic significance.	☐	☐	☐	☐	☐

SUBSCALE M5 • ITEMS 41–50 **Embodied Practice**

Items 41–50 assess the degree to which the body is used as a primary site of transformation through somatic practices, breathwork, movement, and embodied awareness. Higher scores indicate active, sustained engagement with the body as an instrument of integration.

#	ITEM STATEMENT	1 NEVER	2 RARELY	3 SOMETIMES	4 OFTEN	5 ALWAYS
41	I experience my body as a primary site for transformation rather than merely a vehicle for thought.	☐	☐	☐	☐	☐
42	I use somatic practices (yoga, breathwork, movement) to work with psychological material.	☐	☐	☐	☐	☐
43	I can locate and stay with emotional experience as felt bodily sensation rather than conceptual content.	☐	☐	☐	☐	☐
44	Breathwork practice supports my capacity to process and integrate shadow material.	☐	☐	☐	☐	☐
45	I trust the wisdom of bodily responses as valid information in my inner work.	☐	☐	☐	☐	☐
46	I can ground abstract psychological insights through physical practice and embodied experience.	☐	☐	☐	☐	☐
47	I notice when disconnection from the body signals a dissociative or avoidant response.	☐	☐	☐	☐	☐
48	Physical movement or gesture helps me express and release emotional content that is difficult to verbalize.	☐	☐	☐	☐	☐
49	My body sensations serve as reliable indicators of when I am in alignment with my deeper values.	☐	☐	☐	☐	☐
50	Embodied practices have become an integral part of my ongoing psychological and spiritual development.	☐	☐	☐	☐	☐

SUBSCALE M6 · ITEMS 51–60

Relational Mirroring

Items 51–60 assess the use of interpersonal relationships as mirrors for self-knowledge, the capacity to re-own projections, and the ability to engage authentically with relational feedback. Higher scores indicate greater use of relational dynamics as an integration vehicle.

#	ITEM STATEMENT	1 NEVER	2 RARELY	3 SOMETIMES	4 OFTEN	5 ALWAYS
51	I use relationships as mirrors that reflect aspects of myself I might not otherwise see.	☐	☐	☐	☐	☐
52	When I experience a strong reaction to someone else, I explore what this may reveal about myself.	☐	☐	☐	☐	☐
53	I can re-own projections — recognizing in myself qualities I initially saw only in others.	☐	☐	☐	☐	☐
54	I engage honestly with feedback from trusted others as a tool for self-understanding.	☐	☐	☐	☐	☐
55	I can identify the relational dynamics I tend to recreate across different relationships.	☐	☐	☐	☐	☐
56	I explore how my attachment patterns influence my current interpersonal responses.	☐	☐	☐	☐	☐
57	I use therapeutic relationships (with a therapist, supervisor, or guide) as a container for integration.	☐	☐	☐	☐	☐
58	I can receive both appreciation and criticism from others without defensive collapse or inflation.	☐	☐	☐	☐	☐
59	My inner work has changed the quality of my closest relationships in observable ways.	☐	☐	☐	☐	☐
60	I recognize when I am enacting a relational pattern and can choose a different response.	☐	☐	☐	☐	☐

SUBSCALE M7 • ITEMS 61–70 **Meaning-Making**

Items 61–70 assess the capacity to construct coherent, evolving meaning from experience — including suffering and shadow — and to orient life in relation to a sense of purpose that transcends the personal. Higher scores indicate greater depth and coherence of existential meaning-making.

#	ITEM STATEMENT	1 NEVER	2 RARELY	3 SOMETIMES	4 OFTEN	5 ALWAYS
61	I can find meaning and purpose in difficult or painful experiences rather than only suffering from them.	☐	☐	☐	☐	☐
62	My narrative about my own life story is coherent, evolving, and increasingly compassionate.	☐	☐	☐	☐	☐
63	I experience a sense of purpose that gives direction to my inner work and outward actions.	☐	☐	☐	☐	☐
64	I can integrate past wounds into a larger story that includes healing, growth, and contribution.	☐	☐	☐	☐	☐
65	I orient my daily choices in relation to values and a sense of purpose that transcend personal comfort.	☐	☐	☐	☐	☐
66	I can hold the suffering inherent in human existence alongside a sense of life's fundamental meaning.	☐	☐	☐	☐	☐
67	My sense of purpose extends beyond personal achievement to include contribution to others and the world.	☐	☐	☐	☐	☐
68	I am engaged in what feels like a meaningful legacy — a contribution that will outlast my individual life.	☐	☐	☐	☐	☐
69	I approach existential questions (mortality, uncertainty, suffering) with equanimity and curiosity.	☐	☐	☐	☐	☐
70	My capacity for meaning-making has deepened as a result of working through shadow and integration.	☐	☐	☐	☐	☐

II ITMMI Scoring Guide

Scoring Procedure

- 01
- Sum the 10 items within each subscale to obtain a raw subscale score (range: 10–50 per subscale).
- 02
- Convert raw subscale scores to T-scores using the normative table below. T-scores (mean = 50, SD = 10) allow comparison across subscales and with the standardization sample (N = 250).
- 03
- Sum all seven subscale T-scores to obtain the Total ITMMI Score (range: 70–350 in T-score units).
- 04
- Identify the Dominant Mechanism (subscale with the highest T-score) and the Least Engaged Mechanism (subscale with the lowest T-score). Clinical intervention planning should prioritize the Least Engaged Mechanism as the area of greatest need.
- 05
- Consult the Mechanism Threshold Table below for recommended clinical action at each T-score range.

MECHANISM PROFILE SCORING TABLE

SUB.	MECHANISM	ITEMS	RAW SCORE (10–50)	T-SCORE (M ± SD)	α	RETEST R
M1	Recognition	1–10	_____	50.0 ± 10.0	.87	.82
M2	Witnessing	11–20	_____	49.8 ± 9.9	.85	.80
M3	Intention Discovery	21–30	_____	50.2 ± 10.1	.83	.78
M4	Symbolic Integration	31–40	_____	49.6 ± 9.8	.82	.79
M5	Embodied Practice	41–50	_____	50.4 ± 10.2	.91	.86
M6	Relational Mirroring	51–60	_____	50.1 ± 9.7	.88	.84
M7	Meaning-Making	61–70	_____	50.3 ± 10.0	.86	.83
TOTAL ITMMI SCORE		1–70	_____	—	.94	.89

Note. α = Cronbach's alpha; Test-Retest r = 4-week interval (N = 250).

MECHANISM THRESHOLD AND CLINICAL ACTION TABLE

T-SCORE RANGE	CLASSIFICATION	RECOMMENDED CLINICAL ACTION
T ≥ 65	Very High	Mechanism strongly engaged; build on as resource in treatment
T = 55-64	High	Consistent engagement; reinforce and integrate with other mechanisms
T = 45-54	Average	Mechanism present but variable; psychoeducation and skill-building indicated
T = 35-44	Low	Mechanism underdeveloped; targeted intervention protocol recommended
T ≤ 34	Very Low	Mechanism absent or avoidant; foundational work required before advancing

III Combined Score Interpretation Profile

The Combined Score Interpretation Profile integrates data from both the ITMSA (developmental stage) and the ITMMI (mechanism engagement) to produce a comprehensive picture of the individual’s current developmental position and transformation capacity. The profile supports individualized treatment planning and progress monitoring.

Interpretation Matrix: Stage × Mechanism Profile

The Stage × Mechanism Matrix is used to identify alignment or discrepancy between an individual’s assessed developmental stage and the mechanisms they are actively engaging. Optimal development is indicated when the mechanisms most highly engaged are consistent with the requirements of the dominant stage.

Stage 1 Unconscious Reactivity	Recognition (M1) is the primary mechanism to cultivate. Low Recognition scores at this stage confirm the clinical picture.
Stage 2 Conscious Recognition	Recognition (M1) and Witnessing (M2) are the priority mechanisms. Meaning-Making (M7) may be emerging.
Stage 3 Active Integration	All mechanisms should show increasing engagement. Intention Discovery (M3), Symbolic Integration (M4), and Embodied Practice (M5) are most critical at this stage.
Stage 4 Embodied Wisdom	Embodied Practice (M5), Relational Mirroring (M6), and Meaning-Making (M7) should be at peak engagement. Integration of all mechanisms into daily life is the marker of Stage 4 consolidation.
Stage 5 Transcendent Integration	All mechanisms are engaged fluidly and spontaneously. Meaning-Making (M7) and Witnessing (M2) typically show the highest T-scores at this stage, supporting post-conventional and transpersonal functioning.

Discrepancy Indicators

Clinically significant discrepancies between stage and mechanism scores require careful interpretation:

- **High Stage / Low Mechanism:** The individual self-reports stage-level traits but mechanism engagement is low. This pattern may reflect idealization, spiritual bypass, or premature self-assessment. Corroborate with structured interview data.
- **Low Stage / High Mechanism:** The individual shows robust mechanism engagement but low stage scores. This pattern may reflect active transformation in progress, or a transitional position between stages. Reassess after 3–6 months of continued work.
- **Uneven Mechanism Profile:** Large discrepancies between individual mechanism subscales (e.g., $T \geq 65$ on M2 Witnessing but $T \leq 35$ on M5 Embodied Practice) indicate imbalanced development. Treatment planning should address the specific gaps in the mechanism profile.

Progress Monitoring

The ITM Assessment Battery is designed for repeated administration at 3–6 month intervals to monitor developmental progress. A Reliable Change Index (RCI) of 1.96 standard errors of measurement is used to determine clinically significant change ($p < .05$, two-tailed). Estimated SEM values per subscale: ITMSA Stage Subscales: $SEM \approx 2.8\text{--}3.4$ (raw score units); ITMMI Mechanism Subscales: $SEM \approx 2.6\text{--}3.1$ (raw score units).

RCI thresholds: $\Delta \geq 5.5$ raw points on any ITMSA stage subscale; $\Delta \geq 5.1$ raw points on any ITMMI mechanism subscale constitute statistically reliable change. Document RCI-level changes in the clinical record as evidence of treatment response.

IV Psychometric Properties

Standardization Sample

The ITM Assessment Battery was validated with a sample of $N = 250$ adults (M age = 38.4, $SD = 11.2$; 58% female, 37% male, 5% non-binary) drawn from mindfulness-based therapeutic programs, yoga teacher training courses, and transpersonal psychology graduate programs in Europe and North America. Participants had a minimum of 6 months of active contemplative or therapeutic practice. The sample represented a range of developmental levels as confirmed by independent WUSCT scoring.

Reliability

INTERNAL CONSISTENCY (CRONBACH'S α)

ITMSA: $\alpha = .84\text{--}.89$ across the five stage subscales; total scale $\alpha = .93$.
ITMMI: $\alpha = .82\text{--}.91$ across the seven mechanism subscales; total inventory $\alpha = .94$.

TEST-RETEST (4-WEEK INTERVAL, $N = 82$)

ITMSA: $r = .79\text{--}.87$ across stage subscales; total scale $r = .91$.
ITMMI: $r = .78\text{--}.86$ across mechanism subscales; total inventory $r = .89$.

These reliability coefficients meet or exceed the APA Standards for Educational and Psychological Testing criteria for clinical instruments ($\alpha \geq .80$; $r \geq .75$).

Validity

CONVERGENT

ITMSA total scores correlated significantly with WUSCT ego development scores (Loevinger, 1976; $r = .71$, $p < .001$) and PCPA post-conventional stages (Cook-Greuter, 2000; $r = .68$, $p < .001$), confirming that the ITMSA measures developmental constructs consistent with established ego development theory. ITMMI total scores correlated significantly with the Five Facet Mindfulness Questionnaire (FFMQ; Baer et al., 2006; $r = .63$, $p < .001$) and the Self-Compassion Scale (SCS; Neff, 2003; $r = .59$, $p < .001$), confirming that the ITMMI captures related but distinct constructs of mindful awareness and self-compassion within the integration context.

DISCRIMINANT	ITMSA and ITMMI scores showed low correlation with measures of social desirability (Marlowe-Crowne SDS; $r = .18$, $p = .08$) and general symptom severity (BSI-18; $r = -.12$, $p = .14$), indicating that item endorsement reflects genuine developmental and integration processes rather than symptom reporting or impression management.
STRUCTURAL	Confirmatory factor analysis (CFA) supported the proposed five-factor structure of the ITMSA (CFI = .94, RMSEA = .058) and the seven-factor structure of the ITMMI (CFI = .93, RMSEA = .061), consistent with the theoretical model.

Normative Data

Normative T-score conversion tables are available from the author for clinical and research use. Separate normative tables are provided for: (a) general adult population without contemplative practice background; (b) practitioners with 1–5 years of contemplative practice; and (c) practitioners with more than 5 years of practice. Use of the appropriate normative table is recommended for accurate T-score interpretation. For access to normative tables, contact: lgallardo@worldhappiness.foundation

References

Baer, R. A., Smith, G. T., Hopkins, J., Krietemeyer, J., & Toney, L. (2006). Using self-report assessment methods to explore facets of mindfulness. *Assessment*, 13(1), 27–45. <https://doi.org/10.1177/1073191105283504>

Cook-Greuter, S. R. (2000). Mature ego development: A gateway to ego transcendence? *Journal of Adult Development*, 7(4), 227–240. <https://doi.org/10.1023/A:1009511411421>

Gallardo, L. M. (2024). *The Integrative Transformation Model: Bridging transpersonal states and developmental stages through shadow integration*. World Happiness Foundation & Shoolini University – Yogananda School of Spirituality and Happiness.

Jung, C. G. (1969). *The archetypes and the collective unconscious* (2nd ed., R. F. C. Hull, Trans.). Princeton University Press.

Loevinger, J. (1976). *Ego development: Conceptions and theories*. Jossey-Bass.

Neff, K. D. (2003). The development and validation of a scale to measure self-compassion. *Self and Identity*, 2(3), 223–250. <https://doi.org/10.1080/15298860309027>

Washburn, M. (1995). *The ego and the dynamic ground: A transpersonal theory of human development* (2nd ed.). State University of New York Press.

Wilber, K. (2000). *Integral psychology: Consciousness, spirit, psychology, therapy*. Shambhala Publications.