Occupation Analysis in Practice

Edited by Lynette Mackenzie & Gjyn O'Toole

*Occupation Analysis in Practice* is the essential book for all future and current occupational therapists. It offers a practical approach to the analysis of occupations in real world practice.

The book frames occupation as the key component for analysis and builds upon previous work limited to analysis at the activity level. It examines the interests, goals, abilities and contexts of individuals, groups, institutions and communities, along with the demands of the occupation. It presents examples of occupation analysis in different practice contexts including working with children, health promotion, indigenous health, medico-legal practice, mental health and occupational rehabilitation.

The book has four sections. **Part 1** introduces theoretical perspectives of the concept of occupation analysis and how such analysis relates to particular models of Occupational Therapy practice and the generic World Health Organisation International Classification of Functioning, Disability and Health. **Part 2** discusses analysis of particular components of occupation that support practice. These include culture, spirituality, home and community environments as well as self-care and leisure. **Part 3** applies analysis of occupations to particular specialties encountered in practice. **Part 4** considers the application of Occupation Analysis within professional reasoning and goal setting.

**Features**
- International team of contributors
- Examples of occupation analysis proforma
- Application to a wide range of practice areas
- Glossary of key terms
- Includes the International Classification of Functioning, Disability and Health

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This book is dedicated to all current and future occupational therapists who will aim to assist people to engage in meaningful occupations.
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Carole James
Carole James originally graduated from the College of OT in London. She has worked in a variety of workplace injury management and occupational rehabilitation roles in both the private and public sectors in Australia. Carole currently works as a senior lecturer and researcher in the School of Health Sciences at the University of Newcastle, specifically in the Discipline of Occupational Health and Safety, and within Occupational Therapy. She is currently programme convenor for the postgraduate programmes in Workplace Injury Management and Occupational Rehabilitation and Occupational Health and Safety. She has expertise and interests in the areas of workplace injury management, injury prevention, functional capacity evaluations, risk
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**Gjyn O’Toole**
Gjyn O’Toole completed her qualifications in Occupational Therapy in Sydney, Australia. In her capacity as an occupational therapist, she has worked in various settings including acute care, rehabilitation, community care and health promotion. In these settings, she assisted people with various conditions and occupational needs. These included neurology, rheumatology, amputations, orthopaedics, paediatrics, mental health, the elderly, occupational rehabilitation, medico-legal settings and management. She is currently lecturing at the University of Newcastle, Australia, where she follows interests in cultural inclusivity, person-centred practice and reflective practice. She has consulted and taught occupational therapy in Fiji, China and Iran, and run workshops and lectures on cultural inclusivity, quality education and research in South Africa, Uganda and Kenya. She is the author of *Communication: Core interpersonal Skills for Health Professionals*, Elsevier.

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Claudia Walker graduated from the Occupational Therapy programme at the University of Alberta in 1987. Since that time she has worked in Arctic Canada in both hospital and community-based rehabilitation, before migrating to Australia in 1990. She then worked for CRS Australia (Albury) in workplace rehabilitation specialising in workplace ergonomics and driver rehabilitation for three years. Claudia was then appointed as an inaugural academic member of staff in the new Occupational Therapy programme with Charles Sturt University, where she stayed for eight years. A one-year sojourn took place in Canada where she worked again in community rehabilitation before returning to workplace rehabilitation. Since 1994 she has been in private practice in Newcastle, Australia, specialising in medico-legal assessments or ‘forensic’ Occupational Therapy. Claudia also does clinical occupational therapy for private clients and charitable organisations in her local community.

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Lesley Wilson graduated as an occupational therapist in 1982 from Oxford in the United Kingdom and has held clinical and senior managerial positions in a variety of health and social service settings, including work with children, people with long-term disabilities and older adults. As a lecturer in occupational therapy since 1996, she has taught and supervised research at undergraduate and postgraduate levels, nationally and internationally. She has a strong interest in the global perspective of occupational therapy. Her research interests include the relationship between mind and body, the spiritual dimensions of what we do and how these relate to health and wellbeing, both as therapists and clients. She has published a number of papers, contributed to book chapters and presented at national and international conferences.
Preface

Purpose

Occupation Analysis is a term used in various Occupational Therapy circles, with a variety of meanings. This book seeks to contribute to discussion about this concept. It hopes to broaden understanding of activity analysis to include analysis at an occupation level. It anticipates that such analysis will encourage occupational therapists to make judgements about interventions based on an accurate and responsive analysis of meaningful and relevant occupations. Currently most publications focus on the activity level of analysis. The editors would argue, however, that person/or client-centred practice demands an occupation level analysis of the needs of people encountered in practice, as it is occupation that is associated with personal meaning, action and feelings.

The multiple opinions around the world about this concept made the production of this book a complex task. The various definitions of and understandings about the relationship between Occupation, Activity and Task also contributed to this complexity. While it is probably impossible to reach consensus about these concepts, it is important to contribute to the body of knowledge informing the profession about these important aspects of Occupational Therapy practice. Various chapters within the book reflect the differing opinions about occupation and present varying foci. They, in fact, indicate the reality that the expectations of service contexts affect the focus of practice and the application of Occupation Analysis in practice.

This book is intended for students and new graduates still grappling with the concepts and as such it does not intend to make a definitive final contribution to the discussion. Rather, it is designed to stimulate thought and discussion on practice issues related to these concepts. Learning points throughout may guide and stimulate this discussion.

International perspectives may vary on this topic and thus the book attempts to explore facets of analysing occupation that may challenge readers from a Western tradition. The editors aim to challenge readers to explore and examine occupation outside of their own cultural experiences and assumptions.

Organisation

The book has four sections. The first introduces theoretical perspectives of the concept of occupation analysis and how such analysis relates to particular models of
Preface

Occupational Therapy practice and the generic World Health Organisation, ICF. The second section discusses analysis of particular components of occupation that support practice. These include culture, spirituality and environment as well as the occupational areas of self-care and leisure. These components of occupation impact both service users and service providers in daily practice regardless of the context. The third section applies analysis of occupations to common areas of practice or foci of practice. It cannot cover all areas of practice, but attempts to discuss both well-established and developing areas in occupational therapy practice. This section is organised alphabetically as one area is not considered more important than another. The final section considers the interface between two important aspects of daily practice and occupation analysis; reasoning and setting goals. This section also includes possible resources or guidelines for development of possible resources that might facilitate an occupation analysis or an in-depth exploration of a particular component of an occupation analysis.

Language style and terms

Where possible the book intentionally uses a professional writing style, thus creating greater clarity and succinct expression. This was done to model characteristics of professional writing for readers. This style typically uses active voice, simple present tense and modals and avoids the use of first- or second-person pronouns, as well as apostrophes, whether indicating possession or shortening of words. The sentence structure avoids finishing a sentence with verbs, prepositions and conjunctions. This style also potentially makes the book accessible to people who may not have English as their first language.

The editors chose to use the term context instead of environment as they felt the term context applied to all the chosen features that typically support for occupations. They have also chosen (in most cases) to use the word person instead of patient or client. This choice attempts to emphasise the reality that the people occupational therapists assist are in fact people first and foremost and continue to be, regardless of the reason for seeking the assistance of an occupational therapist.

Please enjoy using this book.
Part I

Theoretical Perspectives on Occupation Analysis
Chapter 1

What is occupation analysis?

Gjyn O’Toole

Chapter outline

An occupation analysis requires an understanding of the centrality of the concept of occupation from an occupational therapy (OT) and occupational science perspective. This chapter considers that engagement in occupations occurs because individuals, groups and communities possess skills or values that facilitate choice and performance of specific occupations within particular contexts. The chapter proposes six innate intrinsic elements and seven environmental contexts that influence performance of occupations. Occupation analysis explores the transactional relationship between three components of occupational performance: the occupation itself; the participating individual, group or community and the contexts surrounding the occupational participation.

Chapter objectives

The reader should be able to:

- Define occupation from an OT perspective.
- Recognize differences between occupation, activity, task and action.
- Identify and explain the ‘areas of occupation’ defined by the American Occupational Therapy Association (AOTA) in the Occupational Therapy Practice Framework, 2008.
- Explain the need for an occupation analysis.
- State and connect the components of an occupation analysis.
- Outline the occupation analysis process.

Concepts implicit within occupational therapy

Occupational therapists are concerned about the needs, desires, experiences and expectations of individuals and/or groups and the role of occupation in meeting those needs and achieving those expectations. Until the late twentieth century a major focus of OT practice...
was the therapeutic use of occupations to improve skills and occupational performance. The late twentieth century saw a growing understanding of the purpose and power of occupation in influencing health, wellbeing and participation in life (Wilcock, 2006). This understanding supports the use of occupation as an intervention and facilitates the unique synthesis of knowledge from various fields into a scholarly discipline known as occupational science. Occupational science is dedicated to examining the form, function and meaning of occupations (Zemke & Clark, 1996). Occupation became more than using objects for therapeutic benefit or successful performance of an activity. It became a force that potentially empowers engagement and performance, thereby contributing to and maintaining health, participation and a sense of wellbeing. Thus, occupational therapists believe that appropriate engagement in relevant occupations has the potential to structure, shape and transform the lives of individuals, groups and communities. In order to analyse occupation in the lives of people with occupational needs, it is necessary to explore this concept.

Occupation: an occupational therapy perspective

There are various definitions for the word ‘occupation’. Reflection upon definitions found in OT literature contributes to understanding the concept of occupation from this perspective.

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Learning Point

**Stage One:** Consider the definitions below, or other definitions of occupation found in OT literature. Choose or create a favourite definition and provide a rationale for this definition.

**Stage Two:** Share this definition and rationale with others (either a small group or the entire class).

**Stage Three:** Evaluate and discuss chosen definitions. Record points of difference and relevant comments that challenge your choice.

**Stage Four:** Compose your own definition and be prepared to explain that definition to another health professional, a relative, a member of the public and a physiotherapist.

- ‘Occupations are defined in the science as chunks of daily life that can be named in the lexicon of the culture’ (Zemke & Clark, 1996, p. vii).
- ‘Activities that people engage in throughout their daily lives to fulfi l their time and give life meaning. Occupation involves mental abilities and skills, and may or may not have an observable physical dimension’ (Hinojosa & Kramer, 1997, p. 865).
- ‘Daily activities that re fect cultural values, provide structure to living, and meaning to individuals; these activities meet human needs for self-care, enjoyment, and participation in society’ (Crepeau et al., 2003, p. 1031).
- ‘Goal-directed pursuits that typically extend over time, have meaning to the performance, and involve multiple tasks’ (Christiansen et al., 2005, p. 548).

The above definitions indicate that occupations are part of daily life. They are all the things people do and they give life meaning (Fisher, 2006). Occupations exist within a dynamic relationship between the unique person and their ability to perform occupations in particular contexts (Nelson & Jepson-Thomas, 2003). They require abilities and skills;
What is occupation analysis?

they are affected by many factors, including culture; and they can contribute to the needs of individuals, groups or societies (Law et al., 1997). They have a purpose or are goal directed and provide a structure for living. As such, occupations are essential for sustaining human life (Wilcock, 1993), influencing the quality of life experiences and determining the health and wellbeing of individuals, groups or communities (Wilcock & Townsend, 2008). Occupations are central to the identity and competence of people, as individuals, groups or communities assign priority and meaning to occupations according to their values and beliefs. Occupation is more than paid employment or occupying time; rather, occupation encompasses what Wilcock (2006) defines as being, doing and becoming.

These definitions indicate the centrality of occupation to OT practice (Polatajko et al., 2004). Facilitating optimal engagement in occupations requires analysis of the occupations to support health and participation in life (DeLany, 2007). It considers the vibrant relationship between the occupation, the individual (group/community) and the contexts that support and facilitate successful occupational participation (Christiansen & Baum, 2005; Law et al., 1996, 2005).

Reviewing terms: occupation, activity and task

The word occupation is often used interchangeably with either activity or task and sometimes even action. Alternatively, some scholars view the terms occupation and activity as having different meanings (Christiansen & Townsend, 2004; Pierce, 2001; Reed, 2005). The following discussion also proposes a different meaning for these terms. In this chapter, consistent with the ‘taxonomic code for understanding occupation’ (Polatajko et al., 2004), the term ‘occupation’ is not synonymous with the terms ‘activity’ or ‘task’, it is an overarching term, which includes and builds upon both activities and tasks. For instance, voluntary movement, movement patterns and cognitive/perceptual skills initiate the action of positioning and moving specific body parts to use a keyboard to complete an assignment. This positioning and movement fulfils tasks, which might include making a plan, choosing references, completing an introduction and so forth. The completion of such tasks contributes to the performance of the overall activity of writing an assignment. The completion of the assignment is an activity within the overall occupation of communicating through writing and can be classified as a productive occupation associated with the role of a student. The occupation of communicating through writing is a meaningful occupation for many occupational roles (student, teacher, health professional, scientist, engineer and so on). Certainly, many cultures consider communicating with writing skills an essential occupation. Another significant occupation is caring for self through maintenance of personal hygiene, an occupation commonly classified as an essential self-care occupation, which belongs with activities of daily living (ADL). This significant occupation – personal hygiene and grooming – includes activities such as caring for nails, hair, skin, ears, eyes, nose, teeth, and each activity encompasses a variety of tasks. Occupational therapists commonly classify occupations according to their purpose or theme (Polatajko et al., 2004), which tends to create three broad occupational groupings: self-care, productivity and leisure.
6 Occupation Analysis in Practice

Learning Point

Using the taxonomic code for understanding occupation (Polatajko et al., 2004), name the occupation and the purpose or theme of each occupation. The first one is completed as an example.

Minute taking

✓ Action = Position notepad and pick it up.
✓ Tasks = Listen and record important points and decisions.
✓ Activity = Taking minutes at a meeting.
✓ Occupation = Performance of defined work role (paid or unpaid).
✓ Purpose/theme = Productivity.

✓ Actions = Pushing up, maintaining balance, e.g. positioning feet.
✓ Tasks = Choose an appropriate wave, stand and steer the board.
✓ Activity = Riding a wave. (One activity in this occupation.)
✓ Occupation =
✓ Purpose/theme =

✓ Actions = 1. pick up brush with non-dominant hand and
2. container of toothpaste (lid already off or open) with dominant hand.
✓ Tasks = With toothpaste already on brush, use brush to clean all teeth surfaces, wash mouth and repeat cleaning if necessary. Return brush to usual place and restore lid to paste container.
✓ Activity = Brushing teeth.
✓ Occupation =
✓ Purpose/theme =

Areas of occupation

The following is a brief summary of how the Occupational Therapy Practice Framework; Domain & Process 2nd edition (AOTA, 2008) classifies occupations into eight areas.

1. Activities of Daily Living (ADL). ADL are self-care or self-maintenance activities that facilitate basic survival and life satisfaction in an interactive world (Christiansen & Hammecker, 2001). Examples include eating, bathing, dressing, sexual activity, toileting.

2. Instrumental Activities of Daily Living (IADL). IADL are those activities that support daily life in the home and community. These include care of pets and others; communicating with others; managing finances, health and home; moving around the community; preparing meals; shopping; participating in religious practices; maintaining safety and responding to emergencies.

3. Sleep. Sleep includes all activities that occur because of the occupation of sleeping, specifically, preparing self and children (if necessary) and the environment to ensure restful and safe sleep. These might include covering the children, completing usual rituals or habits (e.g. saying goodnight, reading, relaxation, saying prayers), interacting with others who share the sleeping space. The occupation of sleeping also includes
What is occupation analysis?

1. What is occupation analysis?

2. Dreaming, night toileting and as necessary negotiating the sleeping space and covers with others.

4. **Education.** Education involves learning and includes all activities supporting learning. Formal education can include academic (e.g. science, reading, undergraduate or postgraduate study), non-academic (e.g. in the environs of the ‘school’), extracurricular (e.g. sport, band, school discos, debating, specialty clubs such as the chess club) and vocational (e.g. activities associated with preparation for a particular vocation or profession). Self-initiated education occurs because of need or interest. It may involve organised classes or informal research and skills development.

5. **Work.** Work includes all activities required to seek, acquire, negotiate and fulfil paid or unpaid (voluntary) employment. Work requires identification of appropriate paid or unpaid positions, applying for those positions, negotiating conditions if successful and consistently performing all required tasks associated with the position, that is, time management, and relating to co-workers, management and ‘customers’ (e.g. following expected work norms and procedures, applying for promotions). This area of occupation also involves preparing for retirement when appropriate. This may include searching for interesting opportunities to volunteer: to engage in unpaid work.

6. **Play.** Play is by far the most engaging area of occupation for children and the young at heart. Parham and Fazio (1997) define play as ‘any spontaneous or organised activity that provides enjoyment, entertainment, amusement or diversion’ (p. 252). Play includes exploration, practice, pretending and engaging in different types of exploratory games. It also includes regular maintenance of any ‘toys’ associated with play activities and playing to maintain a balance between all areas of occupation.

7. **Leisure.** Leisure activities involve interest and enjoyment. They are intrinsically motivated and performed during times allocated for personal pleasure. They may involve passive participation, for instance, watching television. These activities occur when there are no demands or responsibilities from other required areas of occupation (Parham & Fazio, 1997). They require participation in all support activities (e.g. maintenance of any necessary equipment such as inflating tyres on a bicycle when riding for leisure) as well as managing an occupational balance that facilitates performance of required activities in all areas of life.

8. **Social participation.** Social patterns of behaviour are usually governed by social norms and expectations of age, gender, position and role within the particular social system. (Mosey, 1996). Social participation requires interaction of individuals within a social structure: the community, the family and peers or friends. It requires behaviours that support successful interactions from the perspective of the participants and may require different levels of intimacy including, if desired, sexual interaction. Social participation does not always have positive outcomes; for example, group crimes and violence have meaning for the participating individuals but are not positive for everyone.

Classifying occupations or activities into areas of occupation, although important, can be problematic. People differ according to their time of life and their roles and cultures. Therefore, individuals may potentially view particular occupations differently at different times of life. Some see ‘eating’ as ADL, some as play, others as social participation, others leisure and some even as work. Some might consider sewing as work, others
as IADL or even play, while others as leisure. These differences indicate the complex and multidimensional nature of the factors affecting the perceptions of occupation. It is necessary to include these factors in an occupation analysis.

**Learning Point**

**Stage One:** In small groups, choose an occupation or activity. Explain why your choice is classified as an occupation or an activity.

**Stage Two:** Identify any necessary tasks and actions associated with your choice.

**Stage Three:** Consider the following list of occupations or activities. Using the list of areas of occupation summarised above, classify each item into a particular area of occupation. Note any variations in opinion within the group; consider the rationale of each person for their desired classification. Explain why variations occur. Is there a wrong or right way of classifying these?

- Eating; washing clothes; playing Monopoly; napping; mathematics; driving a car; brushing hair; walking the dog; sending an SMS; astronomy; sexual activity; watching a movie; teaching someone to ride a horse and playing a piano.

**A traditional approach: activity analysis**

Traditionally, an activity analysis has been a component of OT curricula. An activity analysis indicates the requirements for successful performance of the activity and indicates the therapeutic potential of that activity (Breines, 2006). This is essential to guide the choice of beneficial, relevant and safe OT interventions. The activity analysis process does not necessarily consider all aspects of the individual nor does it consider the contexts that surround the activities. Furthermore, it has not traditionally included the needs of groups or communities, which is a focus of much current OT practice. Generally, the activity analysis process isolates the required actions in the appropriate sequence, lists the equipment used and analyses the particular skills required for safe performance of the activity. It does not typically require the presence of the person(s) or consider individual ways of performing the activity. The activity is the focus of the analysis irrespective of the individual, group or community (Figure 1.1).

This process has traditionally allowed the occupational therapist to consider the reason for using an activity, the goals associated with using the activity and thus the appropriate use of the activity within OT practice. This process, however, potentially encourages a therapist-centred approach to interventions. Conversely, an occupation analysis extends the application of traditional activity analysis to include a person, group or community, thereby potentially encouraging a more person-centred approach. Occupation analysis moves from considering and analysing an activity in isolation to enabling the therapist to use meaningful occupations as therapeutic interventions. It moves beyond the activity to examine the personal meaning and value of the occupation in combination with the features of the contexts surrounding participation in that occupation. An occupation-focused analysis encourages occupational therapists to appreciate the power of occupation as an enabler for people to engage in occupations of their choice. Such a focus empowers occupational therapists to develop their role as enablers of occupation (Townsend & Polatajko, 2007).
What is occupation analysis?

A comprehensive approach: occupation analysis

The activity analysis process can guide occupational therapists to use relevant activities that assist in assessment, development, restoration and/or maintenance of specific skills. However, analysing an activity without consideration of its relevance to the areas of occupation outlined earlier, or the person themselves and the many contextual factors that affect both, limits the fulfilment of needs and achievement of occupational goals.

An occupation analysis considers all these elements, and thus enables the choice of relevant, meaningful and safe OT interventions. It also facilitates the role of the therapist as an enabler of occupational participation. Failure to view OT interventions within a personal and an occupational context has the potential to align OT with a medical model that limits attempts to understand and embrace the person, their needs and their context. The activity of repeatedly gripping, lifting, moving, placing and releasing cones can potentially assess, develop, restore or maintain power grasp, proprioception and range of motion, but lacks an occupational context. It requires little planning or organisation and is easily modified to suit various motor or sensory needs and can be universally applied to a range of individuals, but has limited occupational meaning and purpose. It may have a therapeutic purpose but has a doubtful occupational purpose.

However, using an occupation or related activity relevant to the person(s) that develops similar physical skill, for example, making a hot drink with ingredients placed in appropriate positions to target the required movements, has greater potential to fulfil needs and occupational goals. Consider an elderly person, who requires maintenance of their memory – they would benefit from a memory ‘game’. However, collaborating to develop ‘memory aids’ related to their everyday routines and occupations may achieve greater occupational gains and increased participation in their everyday occupations.

Figure 1.1 The systematic and traditional approach of activity analysis.
Learning Point

Choose an occupation you enjoy.
Why do you enjoy it?
To which area of occupation does it belong? Why?
What skills does it require? Any physical (include sensory), cognitive, communication, emotional or social skills?
Is it a gender-specific or institution-specific (i.e. ‘school’, job, retirement) activity?
Do you have natural abilities appropriate to this occupation? What are they?
What assisted development of your skills in this occupation? (Family? Friends? A mentor?)
Is it a valued activity in your culture and/or society?
What are the best circumstances for performance of this occupation? (Time of day and year, place, age group, use of public places, equipment required, safety considerations.)
Does it require expensive equipment? Is it readily available anywhere?
Could it have therapeutic value? When might you use it as an OT intervention?

Occupation analysis requires knowledge of the demands of the particular occupation and the circumstances that affect the choice and engagement in that occupation. It also requires collaboration with and knowledge of the relevant stakeholders related to the person or people seeking assistance from an occupational therapist. It identifies those occupations and related activities most relevant to the person, group or community. It also identifies what relevant factors and issues relate to and influence the successful engagement in those occupations. A comprehensive occupation analysis focuses on the particular individual, group or organisation and their daily occupations and the multidimensional and complex factors that support or challenge the successful performance of those occupations. It also examines the intrinsic factors or aspects of the person or group, which include the physical, cognitive, emotional, spiritual and social aspects of a person (Brill & Levine, 2005) as well as skills in communication. These dynamically connected aspects affect motivation to engage in occupations, occupational choices and the allocation of priorities associated with daily occupations.

The components of occupation analysis

The components of an occupation analysis have been outlined in Figure 1.2. These are the occupation itself (represented as the key), the person, group or community (the keyhole/lock) and the associated contexts (the keystone that surrounds, supports and ‘holds’ the other components).

- When analysing the key/occupation it is essential to examine it in relation to the individual/group and their relevant contexts, as it is this relationship that makes the occupation personal and unique.
- Analysis of the keyhole/lock/individual or group highlights the need for a ‘fit’ between the occupation and the person(s). This ‘fit’ or meaning allows the person to make fulfilling occupational choices relating to particular roles.
- Analysis of keystone/contexts involves exploration of those factors that affect availability, possibility and inevitability of occupations.
What is occupation analysis?

The Occupation: The key unlocks and provides meaning, purpose and participation.
The Person, Group or Community: The key must ‘fit’ the keyhole/lock.
The Contexts: The keystone surrounds, supports and ‘holds’ each component.

The occupational relationship between the key, the keyhole/lock and the keystone

An occupation analysis highlights that it is essential to view the occupation in association with the individual person, group or community and their relevant contexts.

The occupation: The key that unlocks and provides meaning, purpose and participation

Analysis of the occupation requires consideration of the required values and skills (the demands of the occupation) as well as the circumstances typical for that performance.

The demands of the occupation: Required values and skills

Occupational therapy practice requires knowledge of the values (including motivation) and skills necessary to perform each occupation. These are transactional values and skills,
which relate to physical, cognitive, emotional, spiritual, social and communicative aspects. Each aspect carries particular values that determine the use of the aspects for occupational choices and participation. The physical skills, or actions and movements of the body, are sometimes the most obvious and thus may consume the focus of the therapist. However, occupations also frequently require cognitive skills, that is, the thinking, planning, problem solving, remembering, initiating skills, as well as skills that regulate emotions, that is, the recognition, resolution and appropriate expression of feelings that develop self-esteem and confidence to complete the occupation. Many occupations, such as parenting or caring for an ageing parent, require spiritual values resulting from a desire to understand ultimate questions about the value and meaning of life (Moyers & Dale, 2007). Finally, occupations usually require social and communication skills: behaviours that successfully interact and communicate through actions or words.

It is important to consider the dynamic interaction of all these values and skills, as this reveals the usefulness and meaning of the occupation for particular individuals or groups. Consideration of one skill in isolation from the others may result in failure to adequately fulfil relevant occupational goals. For example, prescribing equipment to adapt the manner of performing an occupation without considering emotional responses or cognitive abilities may result in unused equipment.

**Learning Point**

Consider the required values and skills listed above and list those required to perform the following occupations.

- Sending a picture message
- Volunteering in a homeless shelter
- Supermarket shopping
- Participating in a religious custom
- Caring for a pet
- Learning anatomy
- Gardening

**Circumstances influencing occupation: time (including time of the day, year and life) place, equipment and safety**

In order to understand the occupation itself, it is important to understand the circumstances that influence the performance of occupations. An occupation analysis considers the typical circumstances for the performance of occupations. These circumstances include time (including seasons and age), place, equipment and safety.

*Time* includes the typical time of day, time of year and time in the lifespan of the individual for the performance of the occupation. These three facets of time reveal the usefulness of an occupation in particular circumstances. They indicate the appropriate time of day and year for use of particular occupations and whether it is suitable for the particular time of life. For instance, the time of day affects the routines of going to and rising from bed, which enhances the occupation of sleep. The time of year in some countries affects engagement in outdoor versus indoor occupations. The time of life generally affects the relevance of particular play-related or work occupations.

The circumstance of *place* poses these questions. ‘Where does this occupation take place and how does the place affect the occupation?’ For example, accessing schooling occurs in various ways according to place. In remote outback Australia, access to schooling may be through the radio, long bus trips or boarding school.
Another facet of place poses the following questions. ‘Is the occupation performed indoors or outdoors?’ ‘In private or in public spaces?’ For example, some people exercise outdoors alone in a public place, while others exercise indoors in a gym with others. There are many variations and combination of this, but answers to such questions assist the occupational therapist to appreciate and accommodate the diverse circumstances of place that influence occupational choices.

Another circumstance is the need and availability of equipment to complete an occupation. Such questions as ‘What equipment/object is typically used to undertake the particular occupation?’ ‘Is it readily available?’ ‘How much does it cost?’ ‘Where and how?’ are important. Ready availability is essential if individuals, groups or communities do not possess the equipment themselves. Questions concerning equipment provide information about the items used for particular occupations. Some occupations typically require no equipment, for example, singing. Others may vary in the use of equipment according to need and availability. Some people might bathe with a shower outlet over a bath; others in a shower cubicle with a hand-held shower; others with a bucket and still others might not bathe regularly because of lack of water. This information is necessary when establishing occupational goals and exploring the usefulness of particular occupations to enable occupational performance.

A constant factor in performance of occupations is the issue of safety for individuals, groups or organisations. Answers to the following questions could be useful. ‘What risks are associated with this occupation?’ ‘How can these risks be avoided?’ Specific examination of the best circumstance for safe performance of the chosen occupations assists the occupational therapist to adapt the circumstances, equipment or the occupation as necessary to ensure safety. It is important to include the individual in decisions concerning what constitutes acceptable risks to their safety. Particular cultures may have notions of acceptable risk that do not conform to those of the occupational therapist. Such divergence of opinion should be recognised and managed to enable safe participation in the required and desired occupations.

All of the above circumstances contribute to successful performance of an occupation and thus require consideration in an occupation analysis.

**Learning Point**

Choose two of these occupations. List the details of the typical circumstances for performance of each occupation.

Preparing an evening meal; having a family picnic; conducting a board meeting for a large corporation; accessing a ‘Blog’ site; attending an evaluation of your work performance with your manager; a sexual activity; riding a horse; watching TV.

**The individual, group or community: the keyhole/lock that secures the choice and performance of occupations. The key must ‘fit’ the keyhole/lock/persons**

People, individually or in groups, are multifaceted, with intrinsic elements that dynamically interact to influence occupational choices and performance. These elements
determine the motivation, interest and capacity to perform particular occupations. They affect the roles assumed in the lives of individuals, groups and communities. An occupation analysis must include consideration of the intrinsic elements of people and their roles. Figure 1.2 does not intend to indicate there is a hierarchy governing the identified elements. They have equal value, although one may assume greater importance at various times in life.

What are the intrinsic elements of individuals and groups?

Intrinsic elements and associated skills influence occupational choices and performance for individuals, groups and communities. Two obvious aspects that determine occupational choices and performance are age and gender. They are generally in the forefront of discussion about occupations and roles and relate significantly to physical, cognitive, emotional, spiritual, social and communication elements and skills.

**Learning Point**

Choose a group to which you belong. State the purpose/occupation of this group. Explain how age and gender affect the occupational choices, membership and functioning of the group. What other components affect these choices and functioning?

In a small group examine how age and gender affect individual occupational choices and functioning.

These intrinsic elements exist in a transactional relationship. Occupation analysis involves consideration of this dynamic relationship and its effect upon occupational engagement and performance. One element dominating may produce lack of engagement in a particular relevant and beneficial occupation; for example, if an individual experiences fear (the emotional element) when supermarket shopping they may cease engaging in any kind of shopping. Deliberate consideration of each characteristic within the context of that relationship assists the person, group or community to overcome barriers limiting occupational performance.

**Physical skills**

It is possible to easily observe the physical skills, such as range of joint motion, muscle strength and endurance, body positioning, joint stability. They produce physical responses to the sensory-perceptual demands of an occupation, which facilitate successful participation in daily occupations. They also produce the actions that move the body and facilitate physical interaction with all aspects of the environment.

In a group the physical skills of each individual group member collectively contribute to the group choices and performance of occupations. The physical skills as described here combine in a group to contribute to group outcomes.
What is occupation analysis?

Learning Point
Choose a sporting group. List the physical skills required by the team members. Do all members require the same physical skills? Which roles might require a higher level of particular physical skills and why?

Cognitive skills
The cognitive component of an individual supports the skills of memory, thinking, concentration, problem solving and decision making when choosing or performing an occupation. These skills allow planning and management of the actual performance of the occupation both before and during participation in the occupation. They promote understanding of the consequences of engagement or lack of engagement in occupations.

The collective cognitive components of a group either positively or negatively affect their occupational choices and performance, thereby contributing to what is valued or meaningful to the group or community. The cognitive components of a group or community are a powerful mechanism for problem solving and engagement in meaningful occupations. They can encourage individual engagement and participation as well as assist group development/process.

Learning Point
Consider a group in which you are a member that had to solve a problem or complete a task. State the problem/task. What cognitive skills were required to achieve a satisfactory group outcome? Did cognitive skills of individual group members affect allocation of tasks or group roles and how?

Skills in emotional regulation
The emotional regulation of individuals and groups affect occupational choices and negotiation of these choices. This includes the identification, management and expression of feelings during interactions with self and/or others during performance of occupations. It is this recognition and management that facilitates positive interaction and negotiation with self and others. This component may limit engagement in occupations; for example, anxiety may contribute to poor performance and thus avoidance of particular occupations. Alternatively, skills in emotional regulation assist in the development of confidence and self-esteem and directly affect occupational engagement, competence and performance. For example, confidence may affect the ability to competently play basketball or to take risks.

An emotionally well-regulated group that adheres to appropriate norms (spoken or unspoken expectations of group behaviour) has the potential to achieve meaningful participation and occupational performance. Conversely, a group characterised by the
inability to manage and express feelings appropriately may result in limited occupational opportunities and achievement.

**Learning Point**

In a small group consider groups of which you have been a member. What are the characteristics of an emotionally well-regulated group? What are the characteristics of a poorly emotionally regulated group?

**The spiritual component**

Every individual, group or community has a spiritual aspect which establishes what is valued and meaningful and therefore underpins occupational engagement. The spiritual component of a person affects their connection with and understanding of themselves, others and the world. This component provides the foundation for the perceived purpose of occupations. The associated beliefs and values can motivate and sustain individuals and groups especially during challenging times, offering a means to understand and accept life events (Moreira-Almeida & Koenig, 2006; O’Toole, 2008). This component determines priorities for people and significantly affects health and wellbeing (Powell et al., 2003; White, 2006). The avoidance of this aspect of a person (Miller & Thorensen, 2003; Powell et al., 2003; Seemen et al., 2003) can negatively impact occupational outcomes. Hall et al. (2004) state that if spirituality is consciously significant for the individual, it requires conscious attention from the therapist.

The spiritual component of a group is important. The values of group members whether explicitly stated or implied affect the reason for the existence and achievements of the group. Some groups exist for performance of spiritual occupations; others choose occupations because of a spiritual component relevant to the group members. The spiritual functioning of an individual or group closely affects occupational choices and determines which daily occupations have priority and provide meaning. Understanding and considering this is important during a group occupation analysis.

**Reflective Learning Point**

How do you define spirituality? How does this definition relate to your occupational choices?

**Social and communication values and skills**

These skills involve interaction using words or actions (including facial expressions) and are considered together here because the exercise of communication skills typically occurs within a social context or in a group. Communication regardless of the mode has the intention of interacting with others (O’Toole, 2008). This interaction requires particular social and communication skills. Past and present social experiences affect communication