Part I

Theoretical Perspectives on Occupation Analysis
Chapter 1

What is occupation analysis?

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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.

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 fulfil 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 reflect 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;
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.
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?

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, speciality 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).
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.
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 components of 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,
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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.
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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
What is occupation analysis?

and the social responses of individuals and group members. Such experiences will produce either engagement and performance or avoidance of particular occupations.

While each element is being considered in turn throughout this chapter, a focus upon one aspect in isolation is problematic (Reed & Sanderson, 1999) and not advisable. Each element relates closely with the others in an intricate and delicate relationship, which often makes it difficult and unwise to separate them. An occupation analysis should avoid any tendency to focus upon only one element of an individual, group or community.

**Occupational roles**

Every person fulfils particular occupational roles (e.g. father, son, brother, worker, cricket captain, gardener) which involve particular rights and responsibilities that vary across the lifespan and within particular groups. These roles may be determined by a combination of innate aspects, but they may simply occur because of age, gender, paid employment or involvement in a particular group or organisation and so forth (Harvey & Pentland, 2010). Individuals may assume different roles within different groups or organisations depending on expectations and skills of other group members. However, most roles expect particular occupations; some occupations are predictable and some develop unexpectedly while fulfilling the role.

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<tr>
<th>Learning Point</th>
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<tr>
<td>Choose three roles. List the occupations expected of those roles. Suggest possible unexpected occupational demands of these roles.</td>
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<tr>
<td>Roles occur wherever individuals participate in life. Social expectations generally determine the occupations associated with roles. Regardless of their origin, an occupation analysis requires consideration of relevant roles.</td>
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**Contexts: the keystone surrounds, supports and ‘holds’ the key and the keyhole/lock**

Individuals develop within multiple and diverse interrelated contexts. These exist regardless of the occupation and have significant impact upon the person and the availability, probability and predictability of occupations.

**Cultural contexts**

Culture is discussed in detail elsewhere in the book. It is the phenomenon that reflects the ‘doing and being’ (Wilcock, 2006) of people. It reflects the values and beliefs of the group and results in patterns of thinking and behaving that are specific to that group (O’Toole, 2008). Culture influences every activity and person, everyday (Devito, 2007).

Cultural contexts provide the setting in which individuals grow and develop. They may be global and related to ethnicity, but may also be the culture of a particular family, group, workplace, organisation or institution. Cultural contexts affect how individuals
view themselves and others and how others view them (Watson, 2006). They also determine the value, suitability and acceptability of particular occupations. For example, particular cultures value water and suitable water collection occurs with a bucket. Cultural contexts provide foundation for personal or group satisfaction when performing particular occupations. For example, some cultures expect all children to develop a creative skill (dancing, painting, playing music and the like) at an early age. This satisfaction may relate directly to contributing and participating in society (Beagan, 2007; Black & Wells, 2007; Iwama, 2007, 2004; Kinébanian & Stomph, 1992; Thibeault, 2006; Watson, 2006; Whiteford, 2007; Wright-St Clair & Hocking, 2005; Wright-St Clair et al, 2004). For example, some cultural groups expect children at a given age to contribute to their society through particular occupations. The influence of the cultural context indicates the importance of its inclusion in an occupation analysis. In so doing, the therapist can determine the usefulness and relevance of occupations and associated occupational goals.

Learning Point

In small groups, consider the cultural values group members have about the occupation of caring for animals.

What do group members feel about animal ownership? Of particular animals?

Discuss the possible reasons for animal ownership.

What impact might your cultural context have on these opinions?

Select another occupation and discuss the impact of cultural contexts on that occupation.

Spiritual contexts

Some view the spiritual context as relating only to religious rituals and communities. This is certainly one understanding and deserves consideration. However, in this book, the spiritual context relates to the values and beliefs of the person or community, which determine personal/group meaning and affect motivation for participation in particular occupations.

The spiritual context provides the values and beliefs that sustain and motivate individuals/groups. It affects the occupational habits and routines that affect occupational performance. Values and beliefs often determine the regularity and time of the day, the week, the year or the particular situations for occupational participation. For example, football or ice hockey are valued sports in particular contexts and thus are the focus of attention for many at particular times of the day, week and year, depending on the role and involvement with the sport. These habits and routines reinforce values and beliefs while contributing to personal or group identity. They may have a positive or a negative impact upon the individual and their community. Acknowledging and accommodating the spiritual context can encourage individuals or groups to perform meaningful occupations, thereby promoting healing, participation and function (O’Toole, 2008). However, personal values and meaning relate to commitment, for example, to social interaction, sport, house cleaning, learning a new skill, performing particular things, such as music.

The influence of the spiritual context upon occupations varies from individual/group to individual/group and therefore the value assigned by a therapist may differ from those
What is occupation analysis?

It is important to include this context in an occupation analysis to accommodate these differences and devise significant occupational interventions.

Learning Point

Reflect upon what occupations you value. Consider the relationship between your values and the performance of those occupations. Would the quality of the performance (dependent on your ability) be important to you? For example, is it possible for someone who is tone deaf to achieve meaning from learning singing? Or for someone who does not value music to practice a musical instrument regularly? What if someone does not value or lacks ability in sport? How might that affect their participation in sporting activities?

Socio-economic contexts

The socio-economic context of an individual or group affects the accessibility of particular occupations. It determines the resources available and directs the use of those resources. This context causes occupational deprivation for certain groups in society, which adversely affects health and wellbeing. Moreover, in some cases the socio-economic context limits access to health services and education (Black & Wells, 2007; Kronenberg et al., 2005; Stomph & De Jonckheere, 2006).

This context also determines where an individual might live and the resources (including educational resources) available to the surrounding community or groups within that community. It can determine the manner of performing occupations; for example, groups with unlimited socio-economic resources may outsource household tasks whereas groups with limited economic resources generally adapt their manner of performing occupations. For example, some have their own car to travel from suburb to suburb, whereas others with limited resources might walk or use public transport.

Political and institutional contexts

Although many overlook the significance of these contexts, political and institutional contexts control policies, legislation and provision/allocation of funding and affect occupations and people around the world. Political and institutional decisions can result in war, reduction in employment, inflation and affordability of resources, thereby affecting availability, possibility and inevitability of occupations. These contexts make particular occupational routines inevitable, for example, living on the street, squatting, begging, violence and crime. These contexts may affect availability of resources for particular populations within some sectors of society, thereby either establishing or removing basic human rights. An occupation analysis that considers and seeks to influence a political or institutional context can potentially empower individuals, groups and communities in occupational choices that produce health and wellbeing. An example of this is the involvement of street children in the Day of Tolerance celebrations in Guatemala (Kronenberg et al., 2005, p. 60: 261–276.).
Social contexts are interactive (Fisher, 2006) and frequently complex. However, most individuals perform in multiple social contexts every day. They include interaction with family, friends, colleagues, carers, pets, social groups, organisations and institutions. Social contexts often produce unconscious expectations, which manipulate occupational choices and performance (Kielhofner, 2002; Kronenberg & Fransen, 2006; Stomph & De Jonckheere, 2006; Townsend & Polatajko, 2007). These expectations within a social environment can foster development of co-occupations (Zemke & Clark, 1996). These occur when more than one person performs the occupation. They require reciprocity and interaction (Esdaile & Olsen 2004). Care-giving and mothering are examples of co-occupations (Olsen, 2004).

Social contexts include social structures, which may include gender roles, work hours, age of school attendance, retirement age; structures for appointment of leaders of groups and selection of government bureaucrats; structures for progressing through organisations and the demands and expectations of occupational roles. These structures are socially determined, vary across cultures and rarely change without political or social action. They often influence the availability of occupations and thus can strongly influence the occupational choices of particular individuals and groups. For example, in many Western societies, social structures determine the age that children begin paid employment.

Social environments provide the context for occupational habits and routines (AOTA, 2008). Habits are automatic behaviours that become incorporated into complex occupations. For example, a person might automatically put car keys in the same place, consistently shower in a specific order or automatically light a cigarette after eating. Such habits can either sustain or obstruct choices and performance of occupations. Similarly, routines can satisfy, promote or harm performance. They are usually obvious, systematic and repetitive, for example, following a sequence to complete the process of going to bed. Habits and routines provide structure and purpose in daily life; however, they are not always positive.

**Learning Point**

Consider the complex behaviour of leaving the house on a work day morning. Identify the habits and routines that support this behaviour. Which occur simultaneously? Identify what might interrupt these habits and routines. How would these interruptions affect this behaviour?

Appropriate intervention as a result of occupation analysis that considers social contexts can generate suitable occupational choices and in many cases occupational access and balance for various individuals and groups.

**Technological contexts**

Technological contexts are an increasing reality in the twenty-first century. They facilitate travel (e.g. perhaps exploring the galaxy later in the century), medical advances (e.g.
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Genetic engineering, development of energy-saving devices (e.g. motorised bicycles and electric scooters), use of computers for leisure or work pursuits and immediate communication without physical contact. Individuals, groups, organisations and various sectors of society constantly perform in these contexts. These comprise the use of communication devices including SMS, e-mail, personal web sites, videoconferencing, chat rooms, electronic learning systems, and Skype. There is potential for occupational alienation and deprivation for those groups who are unable to access, learn or afford the required technology to experience this context. Use of these contexts has occupational implications for the future and consideration of them is increasingly important when analysing occupation for particular individuals and groups.

Physical contexts

Physical contexts incorporate natural, built and temporal aspects. Natural aspects include such features as weather, terrain, flora and fauna, climate and fragrances. They influence the accessibility, likelihood and inevitability of particular occupations. Built aspects include buildings, access to buildings, equipment and devices, lighting and temperature controls, furniture and tools. These influence the choices to perform occupations and the quality of performance for all individuals and groups. Modifying built aspects of the physical context to promote and ensure safe occupational performance is a skill expected of all occupational therapists. Temporal aspects refer to the reality of the 24-hour clock and the related progression of time throughout life. This aspect affects the timing of occupations and often the possibility of occupational performance. An occupation analysis examines the characteristics of the physical contexts and thus facilitates the appropriate adjustments to occupational interventions.

The keystone or contexts influence the quality of occupational performance and the satisfaction of the individual or group with the performance (AOTA, 2008). They exist within a dynamic relationship that either encourages or restricts choice and performance of occupations. Occupation analysis provides an understanding of how these contexts and environments promote meaningful and purposeful engagement in daily life. It thereby encourages participation, which supports the health and wellbeing of individuals, groups and communities.

Chapter summary

Occupation is the central focus of OT and occupational science. When used appropriately, this powerful tool facilitates health, wellbeing and participation. Occupation analysis does not consider the occupation or the individual in isolation. It examines the characteristics of the occupations in relation to aspects and skills of individuals or groups and their desires to perform occupations within the framework of the contexts that facilitate, support, challenge or restrict that performance. Occupation analysis aims to empower occupational therapists to assist individuals, groups or communities to achieve satisfactory participation in chosen occupations within their particular contexts.
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