Use of the Role Checklist as a guide to the measurement of narrative plots

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Narrative Plots
Limitations of narrative plots

- Time consuming to carry into the future
- Sometimes no need to carry into future
- Requires on-going contact to track trends in participation and/or be alert to emerging needs
Possible solution - what we do

- Use the face to face encounters to establish the narrative plots
- Use the role checklist to monitor and track progress
The Role Checklist
- One of the original Kielhofner instruments dating back to 1986

- One of the most commonly used screening by OT’s

  (Lee, Taylor, Kielhofner, 2008)

- Used in multiple international research studies

- Nearly 200 studies that cite the Role Checklist

  (Oakley, 2008)
Role Checklist

- The Role Checklist is a screening tool that offers information about past present and future role engagement and role value.

  Part I: Role Incumbency
  - Captures the subject’s past, current and expected future participation for each of the 10 roles.

  Part II: Role Value
  - Instructs the subjects to rate their value of each role.

  (Oakley, Kielhofner, Barris & Reichler, 1986)
The purpose of this checklist is to identify the major roles in your life. The checklist, which is divided into three parts, presents 10 roles and defines each one.

**PART I**

Beside each role, indicate, by selecting the appropriate boxes, if you performed the role in the past, if you presently perform the role, and if you plan to perform the role in the future. You may select more than one box for each role. For example, if you volunteered in the past, do not volunteer at present, but plan to in the future, you would select the past and future boxes.

Past refers to the period of time up until seven days ago. Present refers not only to today, but also includes the previous seven days. Future is anytime from tomorrow onward.

**STUDENT** Attending school on a part-time or full-time basis.

- [ ] Past
- [ ] Present
- [ ] Future
  (Check All That Apply)

**WORKER** Part-time or full-time paid employment.

- [ ] Past
- [ ] Present
- [ ] Future
  (Check All That Apply)

**VOLUNTEER** Donating services, at least once a week, to a hospital, school, community, political campaign, and so forth.

- [ ] Past
- [ ] Present
- [ ] Future
  (Check All That Apply)

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**PART II**

The same roles are listed below. Next to each role, select the answer which best indicates how valuable or important the role is to you. Answer for each role, even if you have never performed or do not plan to perform the role.

Valuable refers to the worth you place on each role, that is, how important or desirable the role is to you.

<table>
<thead>
<tr>
<th>Role</th>
<th>Not At All Valuable</th>
<th>Somewhat Valuable</th>
<th>Very Valuable</th>
</tr>
</thead>
<tbody>
<tr>
<td>STUDENT Attending school on a part-time or full-time basis.</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
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</tr>
<tr>
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<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>CARE GIVER Responsibility, at least once a week, for the care of someone such as a child, spouse, relative, or friend.</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Role Checklist Research

Content Validity

Reliability

- Test-retest reliability for Part I was found to be 73-97%, for Part II 79%,

  (Oakley, Kielhofner, Barris, & Reichler, 1986)

Discriminate Validity

- Individuals without disabilities consistently engaged in more roles than persons with disabilities N =1020 p<0.01

  (Dickerson & Oakley, 1995)
Association with the ICF performance areas
**Relationship between ICF Participation areas, Domains and Role Checklist.**

(Scott, 2008)

<table>
<thead>
<tr>
<th>ICF Participation Areas (WHO, 2001a)</th>
<th>Domains included in the ICF Areas (index reference)</th>
<th>Roles listed in the Role Checklist (10)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Ch. 6: Domestic Life</td>
<td>Assisting Others (d 660)</td>
<td>Caregiver</td>
</tr>
<tr>
<td></td>
<td>Household tasks (d 630-649)</td>
<td>Home maintainer</td>
</tr>
<tr>
<td>Ch. 7: Interpersonal Interaction</td>
<td>Interpersonal Relationships (d 730-750)</td>
<td>Friend</td>
</tr>
<tr>
<td></td>
<td>Participant in Relationships (d 760)</td>
<td>Family Member</td>
</tr>
<tr>
<td>Ch. 8: Major life Activities</td>
<td>Education (d 810-839)</td>
<td>Student</td>
</tr>
<tr>
<td></td>
<td>Work / Employment (d 850)</td>
<td>Worker</td>
</tr>
<tr>
<td></td>
<td>Volunteer (d 855)</td>
<td>Volunteer</td>
</tr>
<tr>
<td>Ch. 9: Community, social and civic life</td>
<td>Recreation and Leisure (d 920)</td>
<td>Hobbyist /Amateur,</td>
</tr>
<tr>
<td></td>
<td>Community Life (d 910)</td>
<td>Participant in organization</td>
</tr>
<tr>
<td></td>
<td>Religion and spirituality (d 930)</td>
<td>Religious Participant</td>
</tr>
</tbody>
</table>
My research with the Role Checklist

- Association with the ICF performance areas
- Addition of Part III Quality of Performance
Part III added in 2008 to capture the quality of Role Performance

- Adds a qualitative element to the role incumbency measure (Part I),
- Captures performance rather than participation or incumbency
PART III

Quality of occupational performance can change over time. The roles you indicate presently perform are listed below. Next to each role, select the answer which reflects the quality of your occupational performance compared to your highest prior level.

STUDENT Which answer reflects the quality of your performance compared to your highest prior level?
- □ Worse
- □ Same
- □ Better

WORKER Which answer reflects the quality of your performance compared to your highest prior level?
- □ Worse
- □ Same
- □ Better

VOLUNTEER Which answer reflects the quality of your performance compared to your highest prior level.
- □ Worse
- □ Same
- □ Better

CARE GIVER Which answer reflects the quality of your performance compared to your highest prior level.
- □ Worse
- □ Same
- □ Better

Part III added 4/30/2008 by Patricia J. Scott PhD, MPH, OTR, FAOTA for research purposes.
My research with the Role Checklist

- Association with the ICF performance areas
- Addition of Part III Quality of Performance
- Relationship between role participation and QOL in liver transplant recipients (n=161)

(Scott, 2011)
Present - 74 of 161 met criteria for Full Role Participation
Past - 115 of 161 met criteria for Full Role Participation

Present - 74 of 161 met criteria for Full Role Participation

Issues of self report and role occupancy
Limitations of self report and role occupancy
19

My research with the Role Checklist

- Association with the ICF performance areas
- Addition of Part III Quality of Performance
- Relationship between role participation and QOL in liver transplant recipients (n=161)
- Longitudinal study of recovery in post transplant recipients
Mean # of role for all cases: actual roles of Case # 20 not contextualized by Part III
Mean # of role for all cases: actual roles of Case # 20
Contextualized by Part III

8 roles, 6 worse, 2 same (friend and family member)
Mean # of role: 6.77

8 roles, 2 worse, 6 the same
Mean # of role: 6.16

8 roles, all the same
Mean # of role: 5.53

5 roles, all the same
Mean # of role: 5.7

6 all worse
Mean # of role: 4.66

2 worse (friend and family) 2 better (caregiver, home maintainer)
Mean # of role: 3.57

Mean # of role for all cases:
8 cases, 6 worse, 2 same (friend and family member)
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8 cases, 2 worse, 6 the same
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6 cases, all worse
Mean # of role: 4.66

2 worse (friend and family) 2 better (caregiver, home maintainer)
Mean # of role: 3.57
FACIT Fatigue Scale: Mean of all cases - Case #20 over 15 months.
Role Incumbency: Mean # of roles - case #20 over 15 months.

- Worse
- Better
- Same
- No Expectations
- In hospital

Graph showing the number of roles over time from case #20.
Work in progress
Scoring index to track changes in client’s perception of the quality of occupational participation in valued roles.

\[ \sum (Q_s P_s V_s + Q_w P_w V_w + Q_v P_v V_v + \ldots + Q_p P_p V_p) = (0, 1, 2, 3 \ldots 90) \]

Where:
(Q) = Quality of occupational performance,
(V) = Value of Role and ;
(P) = Current role incumbency
Use of the Role Checklist as a guide to the measurement of narrative plots

Development of the Role Checklist as a Transnational Tool to collect data on Disability Characteristics, Quality of life, opportunities and Rehabilitation needs
Short-term:

1. Identify a multinational working group interested in working on this project
2. Obtain 2-3 collaborators willing to translate Part III into their language and upload the Role Checklist in those languages
3. Locate 4-6 centers willing to enter the data from the role checklist into Redcap.

Recommendation 8: improve disability data collection

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Nationally, disability should be included in data collection. Uniform definitions of disability, based on the ICF, can allow for internationally comparable data... Data also need to be disaggregated by population features to uncover patterns, trends and information about subgroups of persons with disabilities.
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Nationally, disability should be included in data collection. Uniform definitions of disability, based on the ICF, can allow for internationally comparable data... Data also need to be disaggregated by population features to uncover patterns, trends and information about subgroups of persons with disabilities. **Dedicated disability surveys can also gain more comprehensive information on** disability characteristics, such as prevalence, health conditions associated with disability, use of and need for services, quality of life, opportunities, and rehabilitation needs.” (p.20)
“The whole concept of participation in ICF was based on the idea that people with disabilities should have a place in society along with those who don't have disabilities. Roles are what bind us to society and so role performance is a large component of participation”

Gary Kielhofner: email 12/3/2008
Current translations of Role Checklist (Oakley 1986)

1. Arabic  Farzaneh Yazdani
2. Chinese  Dr. Ay-Woan Pan
3. Dutch  Luc Vercruysse
4. French  Chantale Marcoux
5. German  Dr. Christiane Mentrup
6. Hebrew  Michal Avrech Bar
7. Japanese  Takashi Yamada
8. Portuguese  Júnia J. Rjeille Cordeiro
9. Slovenian  Nevenka Gricar
10. Spanish  Carmen Gloria de las Heras de Pablo
11. Swedish  Lena Haglund
12. English  Fran Oakley
Internationally: the current situation
Electronic Administration of Role Checklist
Secure Data Collection using REDCap: The REDCap (Research Electronic Data Capture) database system, for electronic collection and management of research and clinical trial data will be implemented to collect data for this study.

To comply with HIPAA guidelines, processes and procedures have been documented and implemented to ensure the security and protection of the study data within the computer operations center, the server, and the database.
1. An individual must register an account within the Indiana CTSI Hub and either be assigned a username/password

2. Once a Hub account has been established, an individual must submit a request for a REDCap account; the request must be approved and then a REDCap account is established; and,

3. An individual must have their REDCap account be granted appropriate access and privileges to the specific project database by the project PI or delegate.

IU uses a three level security model to secure and protect data collected and stored within REDCap.
What the working group would do

1. Conceptualize the scope of the project
2. Identify the cross cultural issues
3. Participate in a feasibility trial of Role Checklist data capture through REDCap
4. Identify local therapists to participate in
   1. Translation, and
   2. Enlist facilities to participate
Patients or clinicians can print out a PDF of each completed Role Checklist (in the native language)

Assessments will be stored in REDCap and accessible to the participating therapist/unit/country

This provides a source of:
- outcome data (patient effectiveness)
- Alerts for need of health services
- transnational comparisons
Why would individual therapists want to participate?

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CARE GIVER Responsibility, at least once a week, for the care of someone such as a child, spouse, relative, or friend.
How to get involved

- Just let me know – come talk to me
- Come get a business card.
- Think about it later???

Email me scottp@iupui.edu

Thanks

Comments-questions???