

# The Role Checklist

## **Background**

Within the occupational behavior tradition, roles are characterized as critical determinants of productivity. Occupational roles organize behavior by contributing to one's personal identity, conveying social expectations for performance, organizing use of time, and including the individual within the social structure. The occupational therapist's unique view of disability involves understanding how illness or injury affects occupational role performance. Successful adaptation after illness or injury may depend on a person's ability to competently resume or to establish new occupational roles.

The Role Checklist was designed to elicit information about a person's occupational roles. Occupational roles consist of both playful and productive behaviors. Playful behaviors are characterized as "non work" such as hobbies, sports, or social recreation. Productive behaviors contribute some service or commodity that others need or desire.

The Role Checklist has been translated into ten languages (Arabic, Dutch, French, German, Japanese, Portuguese, Spanish, Swedish, Chinese, & Hebrew) for international use. It is a reliable and valid assessment tool that provides:

1. Data on individuals' perception of their participation in roles throughout their lifespan.
2. Data regarding the degree to which each role is valued.
3. Supplemental information regarding an individual's capacity to maintain a balance among roles.

## **Description of the Role Checklist**

The Role Checklist is a written inventory, requiring approximately fifteen (15) minutes to administer, and is appropriate for use with an adolescent, adult, or elderly population. It is divided into two parts. *Part 1* assesses, along a temporal continuum, the major occupational roles that organize an individual's daily life. *Part 2* identifies the degree to which each occupational role is valued.

The occupational roles included in the Role Checklist are: student, worker, volunteer, care giver, home maintainer, friend, family member, religious participant, hobbyist/amateur, and participant in organizations. There is also an "other" category where individuals can enter additional roles not listed. It should be noted that the role definitions include examples that are not meant to be all encompassing. The intent of the checklist is to identify roles with occupational components that serve to organize an individual's daily life. Thus, reference to frequency of performance is included in role definitions. For example, the role of family member refers to spending time or doing something, *at least once a week*, with a family member such as a spouse, child, parent, or other relative. The key phrase is *once a week*. People may view themselves as

family members, but their family may reside out of town resulting in infrequent contact. Consequently, that role is not available to organize present daily life.

## **Administration of the Role Checklist**

Instruct individuals to complete the demographic information at the top of the checklist. Remain with them until the checklist is completed.

### ***Part 1***

- 1) Ask them to read the instructions.
- 2) Inquire if they understand the instructions and answer any questions pertaining to the administration of *Part 1*.
- 3) Define the time frames as follows:
  - a) "*Present* refers not only to today, but also includes the previous seven days."
  - b) "*Past* refers to the period of time up until seven days ago. "
  - c) "*Future* is anytime from tomorrow onward."

### ***Part 2***

- 1) When individuals have completed *Part 1*, ask them to read the instructions for *Part 2*
- 2) Inquire if they understand the instructions and answer any questions pertaining to the administration of *Part 2*.
- 3) Define "valuable" as follows:

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

### **Recommended Reading**

The following book by Dr. Gary Kielhofner discusses the theoretical framework upon which the Role Checklist was developed and presents numerous cases in which the checklist was used clinically.

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# ROLE CHECKLIST

NAME \_\_\_\_\_ AGE \_\_\_\_\_ DATE \_\_\_\_\_

SEX:    ☐ MALE        ☐ FEMALE                      ARE YOU RETIRED?   ☐ YES        ☐ NO

MARITAL STATUS:    ☐ SINGLE   ☐ MARRIED   ☐ SEPARATED   ☐ DIVORCED   ☐ WIDOWED

The purpose of this checklist is to identify the major roles in your life. The checklist, which is divided into two parts, presents 10 roles and defines each one.

## PART I

Beside each role, indicate, by checking the appropriate column, 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 check more than one column for each role. For example, if you volunteered in the past, do not volunteer at present, but plan to in the future, you would check the past and future columns.

ROLE	PAST	PRESENT	FUTURE
STUDENT: Attending school on a part-time or full time basis.			
WORKER: Part-time or full-time paid employment.			
VOLUNTEER: Donating services, <b>at least once a week</b> , to a hospital, school, community, political campaign, and so forth.			
CARE GIVER: Responsibility, <b>at least once a week</b> , for the care of someone such as a child, spouse, relative, or friend.			
HOME MAINTAINER: Responsibility, <b>at least once a week</b> , for the upkeep of the home such as housecleaning or yard work.			
FRIEND: Spending time or doing something, <b>at least once a week</b> , with a friend.			
FAMILY MEMBER: Spending time or doing something, <b>at least once a week</b> , with a family member such as a child, spouse, or other relative.			
RELIGIOUS PARTICIPANT: Involvement, <b>at least once a week</b> , in groups or activities affiliated with one's religion (excluding worship).			
HOBBYIST/ AMATEUR: Involvement, <b>at least once a week</b> , in a hobby or amateur activity such as sewing, playing a musical instrument, woodworking, sports, the theater, or participation in a club or team.			
PARTICIPANT IN ORGANIZATIONS: Involvement, <b>at least once a week</b> , in organizations such as the American Legion, National Organization for Women, Weight Watchers, and so forth.			
OTHER: _____ A role not listed which you have performed, are presently performing, and/or plan to perform. Write the role on the line above and check the appropriate column(s).			

## PART II

The same roles are listed below. Next to each role, check the column 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.

ROLE	NOT AT ALL VALUABLE	SOME WHAT VALUABLE	VERY VALUABLE
STUDENT: Attending school on a part-time or full time basis.			
WORKER: Part-time or full-time paid employment.			
VOLUNTEER: Donating services, <b>at least once a week</b> , to a hospital, school, community, political campaign, and so forth.			
CARE GIVER: Responsibility, <b>at least once a week</b> , for the care of someone such as a child, spouse, relative, or friend.			
HOME MAINTAINER: Responsibility, <b>at least once a week</b> , for the upkeep of the home such as housecleaning or yard work.			
FRIEND: Spending time or doing something, <b>at least once a week</b> , with a friend.			
FAMILY MEMBER: Spending time or doing something, <b>at least once a week</b> , with a family member such as a child, spouse, or other relative.			
RELIGIOUS PARTICIPANT: Involvement, <b>at least once a week</b> , in groups or activities affiliated with one's religion (excluding worship).			
HOBBYIST/AMATEUR: Involvement, <b>at least once a week</b> , in a hobby or amateur activity such as sewing, playing a musical instrument, woodworking, sports, the theater, or participation in a club or team.			
PARTICIPANT IN ORGANIZATIONS: Involvement, <b>at least once a week</b> , in organizations such as the American Legion, National Organization for Women, Weight Watchers, and so forth.			
OTHER: _____ A role not listed which you have performed, are presently performing, and/or plan to perform. Write the role on the line above and check the appropriate column(s).			