

An Instrument for Occupation-Based Research

Subjects: **Others**

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Occupational therapy practice is based on the fundamental assumption that meaningful occupations play a key role in achieving and maintaining health and wellbeing by facilitating personal engagement and accomplishment [1]. This practice framework rests largely on the fact that occupational performance should involve an occupational balance (OB), i.e., a sense of harmony between occupations, becoming a necessary condition to ensure that occupations properly perform a process for obtaining health and wellness. From an occupational perspective of health, it should be noted that there is a variety of risk factors that can affect the right use, choice, opportunity, or balance in an occupation, thereby resulting in occupational dysfunction, which may also involve other negative consequences such as occupational deprivation, occupational alienation, or occupational imbalance.

occupational balance

questionnaire

adaptation

validation

psychometric testing

1. Overview

Occupational balance (OB) may be a major determinant of health outcomes due to its role in bringing a sense of purpose in the occupations that are personally experienced as a process of getting health and wellness. The Occupational Balance Questionnaire (OBQ) is a reliable instrument for measuring OB, although it has not been adapted and validated in Spain so far; therefore, this study had a double aim: (1) to translate and cross-culturally adapt the original OBQ version into Spanish (OBQ-E); (2) to analyze the psychometric properties for its use in the Spanish population. Standard procedures were used for the cross-adaptation process and pilot testing was carried out using three different samples to extend the applicability of the OBQ-E. Validation measures of the final version of the OBQ-E were conducted in a sample of 219 participants. The OBQ-E showed that items and instructions were culturally appropriate and written clearly. Psychometric testing showed excellent internal consistency (Cronbach's $\alpha = 0.87$; Guttman split-half coefficient = 0.85), good test-retest reliability (r_s (Spearman rho) = 0.73), and acceptable convergent validity (overall status, $r_s = 0.37$; Related Quality of Life, $r_s = 0.42$; Satisfaction with Life Scale, $r_s = 0.54$). The findings suggest that the OBQ-E may be a suitable instrument for assessing OB in the Spanish population; hence, it is a promising tool for epidemiological research that will significantly contribute to the understanding of OB as a health-related factor. Nevertheless, further investigation is also warranted to explore the potentiality of this instrument for clinical purposes.

2. Occupational Therapy Practice

Occupational therapy practice is based on the fundamental assumption that meaningful occupations play a key role in achieving and maintaining health and wellbeing by facilitating personal engagement and accomplishment [1]. This practice framework rests largely on the fact that occupational performance should involve an occupational balance (OB), i.e., a sense of harmony between occupations, becoming a necessary condition to ensure that occupations properly perform a process for obtaining health and wellness [2]. From an occupational perspective of health, it should be noted that there is a variety of risk factors that can affect the right use, choice, opportunity, or balance in an occupation, thereby resulting in occupational dysfunction, which may also involve other negative consequences such as occupational deprivation, occupational alienation, or occupational imbalance [3]. In this respect, it is important to have accurate instruments for identifying potential occupational determinants in order to examine their effects on health outcomes; however, the number of available instruments with which to perform occupation-based research remains low.

As a core concept for occupational therapy practice, OB should be considered an important area of research, although its development is still at an incipient stage and it is a relatively new study area. To date, several studies have provided some evidence that OB may be a major occupational determinant of health outcomes. On a positive note, the main research findings have suggested that OB is perceived as a good proxy of self-rated health [2][4][5][6][7][8] and related to life satisfaction [2][4][5][6] and health-related quality of life [2][9]. On the other hand, some studies have reported that occupational imbalance is linked to perceived stress [2][5][10][11].

Although it is recognized that OB is a very complex term to assess, the literature suggests three different forms of OB as main indicators to measure this complicated subjective experience. Along with maintaining a “harmonic mix” within occupations, OB has been conceptualized as the capacity to manage the amount and variation of duties within an occupation while preserving personal preferences, as well as the ability to maintain a strong sense of self-identity through participation in meaningful occupations based on personal values [12]. To our knowledge, there are 23 different instruments for assessing OB [13][14][15][16]. Most of these instruments were initially designed for clinical purposes and not as assessment tools for research. In fact, the available research on OB is based largely on the use of several instruments that were recently developed: the Occupational Balance Questionnaire (OBQ) [14], the Occupational Value with Predefined Items (OVal-pd) [17], the Satisfaction with Daily Occupations and Balance (SDO-OB) [15], and the Occupational Balance-Questionnaire (OB-Quest) [16]. The OBQ [14] particularly focuses on assessing the person’s satisfaction with the amount and variation of occupations, resulting in a global picture of one’s own occupational balance. Unlike the other OB instruments, this questionnaire examines people’s own perceptions of their OB, with the advantage of representing a wide variety of everyday occupations rather than focusing on a single category (e.g., housework, rest, work, etc.) [14]. Interestingly, this questionnaire was developed using a holistic approach based on the experiences of occupations as a way of integrating the three dimensions of OB within a broader scope, thereby providing a full assessment of a person’s occupational performance. It consists of 13 items that measure the current experience of OB according to the quantity of and variability between the occupations and their significance within one’s own personal occupational pattern. Each item can be rated on a scale of 0 (i.e., completely disagree) to 5 (i.e., completely agree). The total score can be obtained by calculating the sum of the respective values of each item, ranging from 0 to 65 points. The OBQ has shown a good internal

consistency (Cronbach alpha, 0.94) and test–retest reliability (r_s (Spearman rho) = 0.93) ^[18], which makes it a reliable instrument to measure OB.

The development of the Spanish version of the OBQ constituted a central part of the doctoral thesis done by P.P.-G. To our knowledge, this version has been used in several previous studies aimed at examining OB in Spanish adults ^{[19][20][21]}; therefore, publishing the results of the adaptation and validation of the instrument is crucial to enhancing the accuracy of the research focused on OB in the Spanish population. The present study had a double aim: (1) to translate and cross-culturally adapt the original OBQ version into Spanish (OBQ-E); (2) to analyze the psychometric properties of the OBQ-E for use in the Spanish population.

3. Conclusions

The OBQ-E may be used as a suitable instrument for assessing OB in the Spanish population. The results of this study show that the Spanish version of the original OBQ has good content validity, moderate convergent validity, strong test–retest reliability, and excellent internal consistency. Judging by the findings from recent studies, the use of this instrument may be of help in monitoring and preventing OB-related problems in the community. For epidemiological research purposes, this is a promising tool that can yield accurate and useful information that will significantly improve the knowledge of OB as a health-related factor. Nevertheless, the potentiality of this instrument for clinical purposes also warrants further investigation.

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