



# OCCUPATIONAL BALANCE IN THE 'THIRD AGE': A CONCEPTUAL MODEL

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## Abstract

**Introduction:** This is a qualitative study, using a constructivist grounded theory approach. It considers what active older people do with their time and why; and what influences their engagement in particular activities.

**Methods:** Fourteen active older people, in the 'third age', completed diaries for up to 14 days, looking at what they did, and their thoughts and reflections on this. The inclusion criteria for the study was that they be retired from their job/career and consider themselves to be independent in their daily life activities. The data was analysed using a constant comparative approach advocated in grounded theory analysis, producing a detailed exploration of the diarists' engagement and motivations, further analysis and memoing leading to a grounded theory modelling of occupational balance for active older people

**Results:** Of the fourteen diarists, eleven completed the full 14 days, with three completing 7 days of the study. The diarists' ages ranged from 60 to 94, with seven in the 60-69 age range and seven in the 70+ age range. In total 175 diary sheets and 156 in-depth reflective sheets were completed, giving 331 documents for analysis.

Six themes emerged from the data, which were interconnected and overlapping, these were: Social Participation and Sociability, Elements of Doing, Contexts for Doing, Influences on Engagement in Doing, Elements of Planning Pacing and Pausing; and Continuity and Belonging. Looking at these as a gestalt enabled the theorising of a concept model of occupational balance in the third age. This model states that Occupational Balance is a multifaceted concept, which requires the subjective evaluation of their own occupational pattern by an individual, to consider whether the occupational experiences engaged in, as a panorama, provide a state of favourable balance of certain properties on a set of continuums, relating to meaning and motivations as well as actual engagement. Occupational Balance is dynamical; with all continuums in a state of possible flux across time. For people in the third age, it is proposed that these properties are: social relatedness; enjoyment; autonomy; planning of occupational pattern; physical activity; challenge; competence; and life-tense perspective.

**Conclusion:** This is a new way to consider occupational balance, and its properties, for active older people. The model reflects that balance is a multifaceted concept, including the meanings and motivations for engagement as well as actual doing. The consideration of occupational balance as dynamical; with all continuums in a state of possible flux across time, where the continuums are not from positive to negative, has not been previously considered. This model has implications for occupational therapy practice in the health promotion arena, where further research is needed into its possible use as therapeutic tool

**Key Words:** Occupation; Occupational Balance; Reflective Diary; Active Older People

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## Chapter 1: Introduction to Thesis

### Introduction

This chapter sets the scene for this research report on a constructivist grounded theory project. It will provide pertinent contextual background information; it will then explain the scope, aims and research questions for the study; explore my engagement with the literature and finally layout the order for the following chapters in this thesis.

### Context and background

I have been interested in what people do with their time and why, and in the specific use of diaries to explore this for twenty-seven years, since beginning my training as an occupational therapist. As a student therapist grappling with theoretical understandings of how the profession viewed and used occupation therapeutically, it was first essential for me to understand what occupation meant to me. I needed to experience doing and to be able to breakdown that doing into its component parts to understand how it could be harnessed to enable rehabilitation. I also needed to understand how other people, with or without impairments, put together their occupations into a pattern and how they achieved occupational balance through this. Part of the undergraduate training to enable me to gain this experience and understanding was to ask a member of my family to complete a diary of their 'doing' and to analyse this in a rudimentary fashion. This early use of a diary to capture the essence of a person's occupational life was of great interest to me, and it was revealing regarding how much information, both on the doing, and the underlying motivations, could be gleaned from this mode of inquiry.

During my career as an occupational therapist working in Social Services in England, the interest in what people do with their time, and why, continued. It was particularly relevant to gain service users' oral or written explanations of their engagement in activity while living in their own homes given that it was not possible to ask clients to demonstrate all their activities in the time allotted for assessments.

My main area of clinical practice as an occupational therapist was within a disabled adults' social care team. The predominant client group was over sixty with varying degrees of impairment evident, impacting on their daily function. My observations were that older people are generally more committed to engagement in activities in their local communities (despite any impairments they may have) than is generally perceived as the case by the public, or indeed by those working closely with them. My occupational therapy perspective on what drives people to continued social participation was that engagement in occupations, which give continuity between the past, present and future, are of great importance to their sense of well-being and quality of life. My

role as a therapist was to support this continuity, which involved enabling people to engage in their desired occupations or to find other meaningful occupations if this was no longer tenable.

The UK is an ageing society, for example the number of people aged at 100 years or older is expected to rise by 425%, from 8000 in 1994 to 34,000 by 2031 (Bernard and Phillips, 2000), analysis of the 2011 census found that 16% (9.2 million) of residents in England and Wales were aged 65 or over (Office for National Statistics (ONS), 2013). More people reached the age of 65 in 2013 than at any time in history, 169000 more people turned 65 in 2013 than in 2012, a 30% increase in one year. This upward trend is due to the first wave of 'baby boomers' (1946-1955) starting to reach retirement at that point (Williamson, 2013). The life expectancy figures for England in 2014 were the highest ever recorded for nearly all ages examined (65, 75, 85 and 95), and despite some fluctuations the overall trend continues to be upward (Public Health England, 2016).

There has been much research and speculation around these demographic changes, with apocalyptic predictions as to the impact on our society, where older people are seen as a burden, taking up resources which would be better spent on productive (i.e. working) younger people (Mental Health Foundation (MHF), 2013; Bernard and Phillips, 2000). However, in 2001 in total only 4.5% of people aged over 65 were living in residential or nursing home establishments (Tomassini, 2005), in 2011 that had reduced to 3.7% (ONS, 2013). It was also noted that the age at which older people move to such establishments seems to have risen. There is a rise in the number of those aged 85 or over living in residential or nursing homes, with a reduction in the number of those between 65-85 (ONS, 2013).

According to Williamson (2013) twenty percent of older people (65-69yrs) in the UK continue to work after state pension age, mostly part time. The 2011 census data suggests this is nearer to 16% for 65-74-year olds, almost double what it was in 2001, a rise of 413000 people over the decade (ONS, 2013). Some need to continue to work for financial reasons, but some continue to do so because they find the work meaningful. It seems that retirement is no longer seen as an insurmountable barrier to continued engagement, and later life is 'a continuation of the present, just another stage in life but by no means the end of the story' (Williamson, 2013, p. 163).

Research has shown that the majority of older people enjoy relatively good health until the final two to three years of their life (Van Weel and Michels, 1997) supporting Laslett's (1996) view that the majority of older people have the capacity to enjoy a 'third age' of personal fulfilment and that his 'fourth age' of frailty and dependency is a relatively short time period in people's lives. Laslett (1996) argued that nearly all older people have been misclassified as being in the Fourth Age. They are demeaned by being victims of a process of stigmatisation whereby they are, as a

whole society of older people, deemed ineffectual and not vital, when in reality older people are in the Third Age for most of their older age. He suggests that

*This obstinate unwillingness to see the Third Age apart from the Fourth has sanctioned their [meaning older people as a group] exclusion from activities, especially earning activities, for which nearly all of them have been perfectly well suited, has debased their status in the eyes of their juniors, and above all has devalued them in their own estimation of themselves. (Laslett, 1996, p.6)*

This suggests that alongside any biological ageing factors there is social ageing, whereby older people in the UK, and in the wider Western World, suffer from discrimination in terms of exclusion from work, social exclusion and stereotyping (Dean, 2003) predicated on the assumption that older people spend many years living with frailty and dependency associated with Laslett's (1996) 'Fourth Age'. There is a lack of evidence of linear links between age and physical decline; however, Government policy, health care and general attitudes in society fixate on age-related decline (MHF, 2013). This is demonstrated even at a practical everyday level, where older people are advised to stop doing activities despite being capable (e.g. standing on a chair to get curtains down for washing) because of the perceived increase in risk due to their numerical age (Mountain *et al.*, 2008). They may not feel empowered to go against this because of the overwhelming pressure of social ageing (Mandel *et al.*, 1999; Laslett, 1996) – the notion that 'you shouldn't be doing that at your age'. This is clearly an issue of social and occupational injustice which society could address if the will was there.

Ageism is defined as the systematic stereotyping and discrimination against people because of their age. We live in a Western, youth-orientated culture (McHugh, 2003) which has 'a range of negative stereotypes about older people and ageing and uses age as a way of imputing levels of ability, competency, skill or health' (MHF, 2013, p. 9). Their review found that 6/10 people surveyed were concerned about attitudes towards older people and only 1/10 thought 'older people were valued in our society' (MHF, 2013, p. 9). This is a stark contrast to more Eastern cultures where growing old is viewed more positively, and society values interdependence (Ekelund, Dahlin-Ivanoff and Eklund, 2014).

The majority of older people in our society do not conform to the stereotypical view of an older person but it is an overwhelming view which even older people themselves seem to accept and by doing so can become not just victims of this ageism but co-conspirators in its proliferation (Midwinter, 1997), as the negative stereotypes are internalised, undermining self-esteem and contributing to feelings of worthlessness (MHF, 2013).

Paradoxically older people who do not fit that stereotype are told they can't be old because they are still capable, and cannot view themselves as old for the same reason (Williamson, 2013; Fry, 2000). Thompson, Itzin and Abendstern (1990) call this discarding:

*The active next-door neighbour, the national political leader, artist or intellectual...are defined out of the frame. They are not a problem, they have no obvious needs, hence they cannot really be elderly (p. 4).*

Baby boomers taking part in research in the UK for the Mental Health Foundation agreed that 'sixty is the new 40' and that seventy is now seen as the beginning of old age from that generation's perspective (MHF, 2013). It seems they are, however, distancing themselves from being seen as old because they are aware of, and perhaps believe, the negative images of the older person within the UK society – this need to redefine when old age starts rather than *redefine attitudes towards it as a concept* contributes to ageism and age discrimination (Williamson, 2013). McHugh (2003) notes that positive stereotypes of ageing, centred on images of 'agelessness and successful ageing' (p. 180), which he suggests parody the 'Third Age', can be as damaging as negative ones and that there is a form of bipolar ageism pervading our Western societies, which either denies ageing or denigrates it.

### **Aim, Questions and Objectives**

The thesis explores these complex issues relating to older people through the linked concepts of occupation and occupational balance. Defined within the field of occupational therapy, the term occupation does not relate only to paid employment. There are a broad range of definitions used within the profession which will be discussed in Chapter 2, but essentially the term is seen to apply to every form of 'doing' in which people engage. An occupation may be considered as the actual doing of something and how it is experienced for the individual (Pierce, 2001a). An appraisal of the all-inclusive engagement in doing of a person, i.e. their occupational balance, therefore necessitates a subjective evaluation by that individual themselves. Albeit influenced by broader cultural considerations and past experiences, this evaluation will be based on an individual's ontological world view and will be unique to that individual.

Some theorists see occupational balance as meaning a balance between different categories of occupation, for example leisure, work/productivity, education, play, social participation, sleep and

rest, activities of daily living<sup>1</sup> and instrumental activities of daily living<sup>2</sup> (American Occupational Therapy Association (AOTA), 2014). However, others share the view that it is a self-defined concept which cannot be understood through a simple counting of the activities in which one engages (Backman, 2004).

Drawing together these strands and perspectives for the research project led to the following aim, questions and objectives:

### **Aim**

To investigate occupational balance in active later life by developing a conceptual model of occupational balance based on experiential data

### **Questions**

- What elements constitute occupational balance for active older people and why?
- How do active older people convey the factors influencing their balance of occupations?
- How do active older people characterise the influence of occupational balance in their lives?

### **Objectives**

1. To review the literature on occupation, within the fields of occupational therapy and occupational science literature, including the categories and elements ascribed to the concept.
2. To review the literature on occupational balance, especially for active older people where possible, and other related topics to identify historical and current research and thinking in this area.
3. To obtain and analyse data from active older people regarding what they do with their time and why, through use of reflective diaries.
4. To explore themes emerging from the data through a constructivist grounded theory approach, then to theorise and refine a conceptual model of occupational balance.
5. To reflect upon the importance of the conceptual model of occupational balance in the 'third age' for occupational therapy practice and research
6. To review the study, both methods and results and consider practice implications and possible future research in this area.

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<sup>1</sup> Activities orientated towards taking care of one's own body, which are fundamental to living in a social world, they enable basic survival and well-being, some examples are: bathing; toileting; dressing; swallowing/eating; feeding; functional mobility; personal hygiene and grooming (AOTA, 2014, p. S19).

<sup>2</sup> Activities to support daily life within the home and community that often require more complex interactions than those used in activities of daily living, some examples are; care of others; care of pets; child rearing; driving and community mobility; home establishment and management (AOTA, 2014, p. S19).

## Engaging with the literature

Engaging with literature in a grounded theory study is a debated subject. Glaser and Strauss (1967) suggest that a literature review should not be undertaken until the majority of the analysis has been completed. At that point the findings and emerging theories can be compared with current literature and research to build a contextualised picture of the landscape of the knowledge base to which the study can contribute. In a video monologue, however, Glaser comments that while it is possible to complete a review prior to undertaking the research (Rhine, 2010), the researcher may find that the literature reviewed at that stage may have little or no bearing on the themes and theories that emerge from data analysis.

It is acknowledged, however, that researchers do not pursue grounded theory without previous knowledge, experience and perceptions (Strauss and Corbin, 1990). With my background as an occupational therapist and from previous research, I understand the concepts which underpin this study and have read widely around those concepts. It has also been necessary to present a proposal prior to undertaking this research; a literature review was a required part of this to demonstrate ability and to determine whether the study had the potential to contribute new knowledge to the area. The use of an underutilised data collection tool within qualitative research (Alaszewski, 2006) meant it was also necessary to engage in a literature review around this to ensure its use could be justified.

Charmaz (2006) suggests that the constant comparative method does not end with the data analysis and whilst it is best to leave the literature review until after data analysis, the literature can also be a valuable source for analysis and comparison. She suggests that fully engaging with that literature enables you to show where current ideas gel with your work and how your theory 'extends, transcends, or challenges dominant ideas in your field' (Charmaz, 2006, p. 165).

Considering these viewpoints, it seemed logical to organise my engagement with literature, within this thesis, so that a review of contributory concepts and research included not only those which were my baseline before beginning the study, i.e. the sensitising concepts (Bowen, 2006), but also some which emerged as important during the analysis. A further engagement with the literature, directly pertinent to the themes and theories of the study will be situated after the findings, in the discussion chapter. A review of literature relating to the data collection tool is situated in Chapter three.

## Summary of Chapter Contents

The concepts to be addressed in chapter two, which provide the theoretical foundation for the study, are the current understanding within the occupational therapy profession of the terms

occupation and occupational balance, along with discussion of how these are seen to link to notions of health and well-being for older people.

In chapter three, the methodology will be critically evaluated, along with the study design which stemmed from my ontological and epistemological stance, as the researcher. This will include an in-depth consideration of the data collection tool and the choice to use a written medium to collect qualitative, reflective data.

The analysis of the data is examined in detail in chapters four and five, where the findings of this in-depth, qualitative analysis of fourteen older adults using reflective diaries will be summarised and presented.

In chapter six, the newly developed model is introduced and reviewed in the light of current theory and research. The importance of the new model to the current academic discourse is considered, in terms of novel contributions made to the theory base, and how the theory resonates with viewpoints held within the profession. The chapter also includes a review of how the model might inform occupational therapy practice, and suggestions regarding translational research needed to enable this. Finally, the utility of the reflective diary in qualitative research will be considered.

Throughout the chapters, occasional footnotes are added to clarify or define terms at the point they are used.

## Conclusion

The continued debate around societal perceptions of old age underlines the need to understand what 'real' older people in the 'Third Age' do and why, from their own perspective. (Older People's Steering Group (OPSG) (2004). This thesis is designed to make an important contribution that understanding.



## Chapter 2: Theoretical foundations, an Occupational Perspective

### Introduction

This Chapter will provide the theoretical foundations and critical direction for this study. As mentioned in chapter one, the exact positioning of literature reviews within grounded theory research writing is debated. It is, however, important to be fully cognisant of the viewpoint and theory base a researcher is bringing into a study, as this will influence their analysis. As Charmaz (2006) asserts, a researcher will act upon their own theoretical and substantive interests and these should be made explicit from the outset, which I will now do.

I am an occupational therapist with a keen interest in the links between occupation, health and well-being, expressed through the broad brush-strokes that occupational balance provides. Within this chapter, occupational therapy and its paradigm are briefly explained. The definitions and categorisations of occupation within the profession and occupational balance and related terms will be explored. Occupation is considered in detail as it is the fundamental concept evaluated by clients, therapists, researchers when considering the concept of occupational balance. An in-depth understanding of how the profession and occupational science view the term 'occupation' is therefore an imperative in contributing to understanding the related concept of occupational balance

### Occupational Therapy

I view the world through a lens influenced by my professional training and experience within the profession of occupational therapy. The profession was founded at the end of the First World War and established on the principle that occupation plays a key role in human health and well-being (Law, Steinwender and Leclair, 1998). It is concerned with the use of therapeutic occupation and activity, or adaptation of personal factors and the environment, to enable people who have developed challenges to continue to participate in meaningful occupations. These challenges could have arisen through acquired or congenital impairments to their physical, mental or social well-being. The occupational therapy profession's central paradigm holds several core concepts: an understanding of the occupational nature of humans; participation in occupation is the core of therapy; and a view of occupation through a dynamical systems perspective, incorporating soft assembly (self-organisation of behaviour as the behaviour is happening) (Kielhofner, 1997). More simply put, occupation is performance and no two occupational experiences – even of the same occupation by the same person, within the same environment – will be the same (Pierce, 2001a).

Currently in lay-terms in Western Society, the term 'occupation' is used to symbolise a person's work - what they do for a living, but, as can be seen from the professional paradigm; for an occupational therapist, it is a complex concept which incorporates all that people do whilst engaged in everyday living. Within the profession, and within occupational science, occupation has been defined and redefined as the professional paradigm advances. This process is influenced by the systems the profession works within, across western societies and beyond, the research being conducted and the views of leading theorists.

The definitions within the profession range from seemingly simple statements regarding the centrality of occupation to life i.e. that occupation is everything that people do to occupy themselves (Canadian Association of Occupational Therapists (CAOT), 2014), through to more complex considerations of the components which constitute occupation. The definitions share common traits but there are differences regarding how much emphasis is placed on certain key features and if contextual elements should be centrally considered.

To study different aspects of occupation and to use occupations therapeutically, it is necessary to understand the elements or properties of occupation and to go beyond a simple definition and develop a typology of those occupations. This typology should be accessible and clear to the client as well as the therapist, so that together they can build a picture of the client's occupational strengths and needs, set within the contexts of the client's life. To that end, the profession has frequently chosen to categorise occupation into simple typologies, which are understood within western cultures - such as self-care, leisure and productivity - or as in the case of the American Practice Framework (AOTA, 2014) - rest and sleep, work, education, leisure, play, activities of daily living, instrumental activities of daily living, and social participation. Many of the models of practice use variations on these typologies to represent and assess the patterns of doing which make up a person's life, and to form the basis of intervention plans.

Developing typologies which incorporate the factors involved in the actual performance of an occupation, so it can be described and the fit between the person, the occupational performance and the context/environment assessed is a central part of the therapeutic process. The relationship between the person, the occupation and the environment in which it occurs has been conceptualised, within the profession, using open systems theory. Drawing on systems theory acknowledges that the person, in performance of an occupation, interacts with and is changed by the environment within which the occupation takes place, whilst at the same time possibly changing the environment. The major practice models used within occupational therapy, in the west, are all based upon this premise and are termed PEOP models (Person- Environment- Occupational Performance, see Christiansen, Baum and Bass-Haugen, 2005). A recent contender, the Kawa (i.e. life as a river) model (Iwama, 2006), takes the view that the person is not separate

from the environment but part of it and takes its philosophy from eastern culture. This concurs with some recent calls to consider more expansive definitions and typologies of occupation, alongside further consideration of its relationship with the environment within which it occurs (Hasselkus, 2011).

The study of the nature, function and meaning of occupation is not limited solely to the occupational therapy profession. From the early 1990s occupational science emerged, and draws evidence from many disciplines, to explore and explain the central role of *doing* in peoples' lives (Molineux, 2001). This has intensified the debate around the term occupation and long held opinions are being challenged as too narrow, culturally specific and not inclusive. A move to experienced-based ways of categorising occupation is therefore being proposed as an alternative (Hasselkus, 2011; Hammell, 2009b).

The definitions of occupation and the typologies/classifications used to describe a person's engagement in different occupations across their life are essential to the study of occupational balance, as measuring time spent in the different classifications or categories of occupation is the most common way that occupational balance has, so far, been assessed (Backman, 2004). Therefore, in the next section I will discuss the definitions and typologies of occupation most prevalent in the occupational therapy and occupational science literature, moving on then, to a discussion of the concept of occupational balance and the particular issues this poses for researchers.

Whilst I am engaged in a project looking at experienced based categorisations towards occupational balance, it was necessary to review what has and is being used and revealed by research, which will help to situate the new knowledge my analysis brings to the topic in relation to active older people, when discussed in chapter six.

This review of literature occurred in tandem with the research process, as would be expected with a grounded theory project and as discussed in chapter one. I followed procedural guidelines on conducting literature searches and reviews and will explain some of these below. However, there is a paucity of empirical research directly relating to *defining* occupation, as a concept in and of itself. Likewise, there is little research into the categories which have been incorporated into the definitions of occupation used within the profession, and how relevant these are to our clients and society. During my initial literature review stages, I had many different permutations of definitions of occupation, ranging from those devised by theorists, those coming from research, those coming from literature reviews of varying study designs, those 'patchwork' definitions used (not developed from their research) by researchers to meet their specific needs in relation to their project, and those used by professional bodies and national associations to explain the term to

the public. It became clear that my thesis would not be able to contain all this information. I therefore focussed in on the main theorist based definitions and those few others generated by research. I took this decision as those based in research had some evidence behind them, and the theorist's definitions whilst not based directly on a specific piece of research tend to be based upon years of theory building and a research career, and show openness for further research into their theories. Appendix 7 gives a flavour of some of the other work reviewed, the table these are drawn from spanned 108 pages.

### Search and review strategy

Hart (2000) suggests that there are two types of literature searches required in relation to a research project – one on literature relevant to the topic and one on research methodologies and data collection tools. Both these types of searches were undertaken, and a summary of the most pertinent discussion points are outlined in this chapter in relation to the topic; and chapter three in relation to the research methodology and data collection tool. More than one literature search was undertaken on the main search areas, i.e., occupation; occupational balance and qualitative, reflective research diaries, due to the length of time this project ran. Other areas of literature were also 'visited' from time to time during the project, to ensure that the content remained up to date, pertaining to ageing policies, statistics and research.

The literature searches were carried out following the systematic method outlined by Hart (1998) and included searching relevant databases for some set key terms in all areas, snowballing from reference lists and hand-searching of relevant journals, for example, the *Journal of Occupational Science* was hand searched for relevant material on occupational balance which may not have come up through the database searches. Early in the project, this hand search led to the discovery of material on a related topic – lifestyle balance – which had not come up in the initial database searches as it was, at that point, a fairly new term and not directly linked to occupational balance. The key words used were recorded as recommended by Hart (1998) to ensure that updates were within the same parameters. For this type of area where there was not a lot of empirical data, snowballing from reference lists was especially useful.

Research articles which were relevant were reviewed with the Law *et al.* (2007) forms for review of quantitative and qualitative research as a guide. A summary of these review notes was kept either in a research notebook, with a hard copy of the article, or on index cards. The main subject-specific literature is now discussed.

### Occupation

The American Occupational Therapy Association (AOTA) (1997) identified occupation as a the 'core' term for the profession, and Fortune and Kennedy-Jones (2014) hold that the link between

occupation and health is the threshold concept of the profession, suggesting that a clear definition of occupation would provide a strong foundation for the profession. They acknowledge, however, that there is not one definition adopted by all (Fortune and Kennedy-Jones, 2014). There are authors who celebrate this wealth of diversity around definitions within the profession (Wilcock and Hocking, 2015), and others also feel that more primary research exploring this core construct and its dimensions are needed before it would be possible to define the term occupation (Hammell, 2009b).

Whilst reviewing the literature it became clear that some theorists' work had gained a 'hold' within the profession and/or occupational science. These were recognisable as a basis for the definitions used by professional bodies worldwide (see College of Occupational Therapists (COT), 2015; AOTA, 2014; Boyt Schell, Gillen and Scaffa, 2014; Wilcock and Townsend 2014; World Federation of Occupational Therapists (WFOT), 2011) or often drawn upon in patchwork definition's used by researchers to define the parameters of their studies, both primary data and literature reviews (Price and Miner, 2007; Bendixen *et al.*, 2006; Goldberg, Brintnell and Goldberg, 2002; Stanley, 1995). Authors undertaking literature reviews on the subject of occupation acknowledged the prevalence of what Hocking (2000, p. 60) calls 'formally proposed definition's and what Ivarsson and Müllersdorf (2008, p. 61) call 'theoretical studies'. Whilst neither of these authors define what they mean, it is certainly not definitions drawn directly from primary research. In my own review of literature, I have found an abundance of papers not based on primary data which propose theories or perspectives, based on their review of literature, or their speciality of practice or study (for example: Carlson *et al.*, 2014; Fischer, Stewart and Davis, 2014; Fox, 2014; Kuo, 2011; Dickie, Cutchin and Humphry, 2006; Persson *et al.*, 2001).

There are some theorists who have produced writings which have had great impact upon the field. They have proposed definitions and theories around occupation which have been adopted by those in practice or undertaking research. These came up within the literature search through the databases, but also significantly through the reference lists of numerous articles where they were cited in relation to the concept of occupation. The theorists of interest in this context are Meyer, Nelson, Pierce, Hammell, Jonsson and Wilcock, who are discussed below. They have produced seminal works which define occupation and categories or dimensions of the concept.

### Meyer

Adolf Meyer (1866-1950) is considered one of the first philosophers of the profession of occupational therapy and one of the most influential psychiatrists of the early 20<sup>th</sup> Century (Yerxa, 1992). He developed a theory of psychobiology, which held that there was an inseparable link between mind and body (Christiansen, 2007). Meyer stated that physical, social and psychological factors are all important to a person's well-being, and argued that daily life,

environment, and habits could affect mental health (Kielhofner, 1997), when most psychiatrists of the day favoured the idea that mental illness was due to neurological abnormalities, brain lesions or focal infection in other parts of the body (Christiansen, 2007).

Meyer employed Eleanor Clarke Slagle in 1912 to manage occupational therapy services in the Johns Hopkins Hospital, Chicago, and was instrumental in helping to conceptualise occupational therapy as it was still in its infancy at that stage. Meyer (1922) in 'The Philosophy of Occupation Therapy' sets out some of the underpinning ideas which became part of the founding vision of the profession. He is often cited, within the profession, as the source for the categorisation of occupation into work, leisure and self-care and as holding the view that a balance between these categories is needed. This, however, seems to be an over-simplified view of his ideas, as Meyer states that:

*'Our conception of man is that of an organism that maintains and balances itself in the world of reality and actuality by being in active life and active use, i.e., using and living and acting its time in harmony with its own nature and the nature about it' (1922, p. 5).*

He was concerned with the rhythms of life, of rest and activity, that people need to be attuned to in their use of time, which includes night and day, sleep and waking, hunger and its satisfaction as well as the rhythms he considered to be the 'big four' which are work, play, rest and sleep. He considered that a person must be able to balance these 'even under difficulty', and the only way to achieve balance in this is to engage in 'actual doing, actual practice, a program of wholesome living as a basis of wholesome feeling and thinking and fancy and interests.' (Meyer, 1922, p. 6).

He suggested that each person organises time in terms of *doing* things, and if this is with foresight built on a sound view of the past and present, it can be 'proper use...a religious *conscience*, of *time* with its successions of opportunities' (Meyer, 1922, p. 6). He saw humans as organisms needing to achieve harmony with themselves and with their environments. He also acknowledged the temporal element of occupation, both as part of occupation and as part of its environment. He clearly made the link between occupation and organisation of life, so occupation provides a rhythm to life as well as needing to fit within other rhythms of life. He did not, however, suggest that there needed to be equal time spent between the different parts of the rhythm of life, or that a particular lifestyle should be prescribed, just that each person should be in harmony with themselves.

It is interesting to note that writing as early as 1922, Meyer recognised the occupational aspects of health and that occupational therapy could be useful in health promotion to the wider population:

*'Our special work, which tries to do justice to special human needs, I feel is destined to serve again as the center of a great gain for the normal as well. It will work like the Montessori system of education. Grown out of the needs of defective children, it has become the source of inspiration and methods for a freer education for all children.*

*What satisfactions you may develop in the guidance in difficult conditions may bring out the best principles and philosophy for the ordinary walks of life.'* (Meyer, 1922, p. 8).

Wilcock and Hocking (2015) and Matsuka and Christiansen (2009), among others, currently call upon therapists to recognise and widen their outlook towards public health and health promotion work, where the client group are not those with impairments or disabilities as defined within the traditional health and social care arenas. The assertion is that it is within the area of lifestyle redesign and the 'proper use' of time that occupational therapists can make their mark, alongside the therapeutic use of occupation to support this.

Another point to note in relation to Meyer is the basis for his ideas; he was a dedicated empiricist and pragmatist (Hooper and Wood, 2002), who held the view that people should be studied holistically in terms of how they interact with their environments. This required developing a comprehensive picture of a person using life history approaches focussing on their personal, social and psychological experiences. He also believed that subjective experiences should be considered data worthy of study. Overall, he called for scientific study designed to deal with complexity whilst retaining the data of human experience as central to inquiry (Yerxa, 1992). He compiled detailed life history case studies of his patients, and it is from this he developed his theories and understandings of occupation and balance.

## Pierce

Pierce (2001a) theorised the difference between occupation and activity, based upon the experiential element which she considers essential to occupation, alongside this she proposed different categorisations of occupation than Meyer which take the concept and the profession beyond self-care, productivity and leisure which she considers to be 'simplistic, value laden, decontextualized and insufficiently descriptive of subjective experience' (Pierce, 2001b, p. 252).

To begin with her definitions of occupation and activity, Pierce (2001a) suggests that lack of differentiation between these two terms 'has a chilling effect on disciplinary discourse, impedes research...and muffles the profession's political voice' (p. 138). She contends that her proposals untangle the terms into two distinct but equally important concepts. Her definition of occupation refers to:

*...a specific individual's personally constructed, non-repeatable experience. That is, an occupation is a subjective event in perceived temporal, spatial, and sociocultural conditions that are unique to that one-time occurrence. An occupation has a shape, a pace, a beginning and an ending, a shared or solitary aspect, a cultural meaning to the person and an infinite number of other perceived contextual qualities. A person interprets his or her occupations before, during and after they happen. Although an occupation can be observed, interpretation of the meaning or emotional content of an occupation by anyone other than the person experiencing it is necessarily inexact. (Pierce, 2001a, p. 139)*

This is similar to the definition given by Nelson (1988) for occupational performance (see below), but here the meaning and motivations are part of the occupation, and the engagement in the performance is not in response to an 'occupational form'. This definition resonates with a constructivist approach as it clearly sees occupation as a product of a person's interaction at a particular time which only that person themselves can truly interpret. It suggests that the person themselves can decide the beginning and the end of any activity. In contrast, definitions which consider that an occupation is a collection of activities hold with them the difficulty of who decides which activities may be part of the occupation, who decides when all the activities have been completed and so on.

Pierce's definition of activity, as opposed to occupation, is as a culturally defined, general class of human action, so an idea held in the minds of people in their shared cultural language (2001a). Put another way it is a typology of the things that people do as understood by the people who have a shared enculturation. It is not specific to a person or an event and is not observable within a specific temporal, spatial or sociocultural context. Pierce (2001a) suggests that common sense understandings of such activities as play or cooking enable people to communicate about generalised categories of experiences in a broad way. She uses 'eating' as an example and explains that this will likely bring to mind, for example: foods, actions, utensils, eating places, social norms around eating. Whilst conversing about eating, a group of people will all have slightly different mental images but will share an understanding of eating as a class of actions i.e. an activity. In this circumstance, Pierce (2001a) claims that 'eating is an idea' (p. 139). If, conversely, a person was to recall the eating of their own breakfast that morning, what was eaten, what their mood was, the beginning and end points, the tastes, smells, textures and so on, it would be their own experience which could never be repeated in the exact way again. In other words, it was fully situated in a real context of time, place and cultural meaning. For Pierce (2001a, p. 139) 'eating breakfast this morning was an occupation'. It was also an example of soft assembly related to systems' theory i.e. everything came together in that particular way at that time – the person, tools, materials and the environment (Kielhofner, 1997).



Pierce (2001a) supports her division of these two concepts with a critical analysis of historical and current perspectives on activity and occupation, and suggests that it is better to continue to use activity within our repertoire than to 'reject it as less worthy' (p. 141) as it is a term which she considers has a common sense understanding in lay terms and it can be used to adapt our communications and message to different audiences.

An important critic of Pierce is Creek (2010) whose definition of occupation is:

*A group of activities that has personal and sociocultural meaning is named within a culture and supports participation in society. Occupations can be categorized as self-care, productivity and/or leisure. (p. 25)*

And that

*An occupation is not a performance and therefore, while occupations can be described or discussed, they cannot be observed. Occupations are ideas or concepts that can be enacted through the activities that are their doing aspects; it is the performance of activities that we observe. For example, Johanna has many occupations, one of which is housekeeping. Some of the activities that Johanna performs as part of this occupation include: tidying, cleaning, cooking, washing up, gardening, decorating, household shopping and organizing house maintenance. (p. 68)*

Creek (2010) argues that each person must understand the social and cultural meaning of the most common or valued occupations performed within their culture to be part of that culture, whether they engage in that occupation or not. For example, children understand what driving is but do not drive. Occupations are named within a culture, often as verbs such as cooking, gardening, and driving. Some are specific to certain cultures; some are cross-cultural, e.g. looking after children. Creek (2010) is quite clear that a person demonstrates their occupations through the different activities in which they engage. Occupation itself is an abstract idea, the activity is the actual doing, so 'an activity is a structured series of actions or tasks that contribute to occupations' (p. 74). The meaning of an activity comes from the occupation it is contributing to (COT, 2006). As discussed above, Pierce (2001a) suggests the opposite relationship between activity and occupation. These directly opposing views of the same constructs give a flavour of the continuing level of debate within the profession about these key terms.

Pierce's definitions of occupation and activity have had a strong influence on how I view the concepts, especially in relation to how individuals' experiences might best be captured and explored. I agree with her that to explore what a person is doing with their time and why; and to be clear that it is the 'specific individual's personally constructed, non-repeatable experience'

(Pierce, 2001a, p. 139) which is explored, is to ask the individual to describe it. It is not enough to observe, or to ask general interview questions, individuals need to describe their specific occupational experiences:

*We will never be able to determine the meaning of an occupation by simply knowing or observing elements of that occupation; we must uncover the meaning, in its entirety, as experienced by the individual.* (Reed, Hocking and Smythe, 2011, p. 306)

How this can be facilitated is explored in the methods chapter of this thesis.

Alongside her theory around the definitions of occupation and activity, Pierce has also proposed categorisations of occupation which form part of her theory for occupation-based practice of occupational therapy. She calls this theory Occupation by Design, described in Pierce (2001b) and Pierce (2003). She considers that to use occupation effectively and therapeutically it is important to understand its dimensions, and to be able to conceptualise their 'occurring effects as they unfold through therapy' (Pierce, 2001b, p. 251). Pierce suggests six dimensions to occupation, three contextual and three subjective.

The contextual dimensions are spatial, temporal and sociocultural and seem similar to those considered by other definitions of occupation, to varying levels of depth (see Pierce, 2001b, pp. 254-255; Pierce, 2003, p. 11). The temporal context includes the circadian rhythm and its impact on occupational engagement and the life span which sets 'a general developmental shape on the occupational patterns of persons at different ages' (Pierce, 2001b, p. 255). She sees both as predictors of general trends in the occupational patterns of people across the life span at a broad level and at a focussed 24-hour span.

Her subjective dimensions of occupation are her challenge to the profession to view occupation as more than work, play and self-care. By doing so, she considers that the profession can begin to examine how the 'subjective experience of occupation is made up of a unique mix of pleasure, productivity and restoration' (Pierce, 2001b, p. 252). Pierce (2001b) does not see these as distinct categories to be chosen from to describe an occupation; rather they are characteristics which are blended together in all occupational experiences to varying degrees. This is an important departure from how the traditional categorisations are used, where occupations are suggested to 'fit' distinctly within one of normally three categories. This blending is illustrated below in the brief discussion of her subjective dimensions:

- **'Productivity'** extends beyond work to include the goal focused dimension of all occupations...it often gives great personal satisfaction...[as]Humans love to be productive' (Pierce, 2001b, p. 253). This is about the end goal, and meaning, of an occupation to the person engaging in it.

- *'Pleasure is process-focused...Pleasure is the degree of enjoyment a person experiences in an occupation'* (Pierce, 2001b, p. 253). This is not about end product, it is about the experience of the occupation whilst engaging in it.
- *'Restoration is the subjective aspect of occupational experience that restores our energy levels and ability to continue to engage in our daily lives...an understanding of the restorative dimension of occupation must be based in an appreciation of the basic life-giving occupation of sleep...people find waking restoration in different ways'* (Pierce, 2001b, pp. 253-4). It is very subjective because what is restorative to one person is not necessarily to another person, some examples are needlework, woodwork, viewing art, listening to music, a physical workout. Eating, drinking and self-care activities are also suggested as restorative experiences.

Pierce's theory, whilst supported by reference to academic literature throughout, is not supported by any primary research, and hence is open to the same types of critiques as those being raised around self-care, productivity and leisure. However, from my perspective, a set of dimensions or categories based around the subjective experience of individuals has a more client-centred feel to it than pre-set imposed categories. Also, the way the dimensions are discussed seems to suggest they could be applied to an occupational pattern, so could be used to evaluate a person's occupational balance, not just used in relation to a specific occupational experience.

## Nelson

Dr David Nelson is Professor Emeritus from the University of Toledo. He has spent his career engaging in theoretical debates about key concepts in occupational therapy. Nelson (1988) has an explicit definition of occupation, based upon a specific theory of how the term should be used to describe the usually expected way that people perform an occupation and the actual engagement in that occupation. This theory is his attempt to provide a way to counteract the ambiguity surrounding the term occupation and how it is used, to ensure consistency of understanding (Nelson, 1988). By 2003, Nelson's theory had been labelled as: Conceptual Framework for Therapeutic Occupation (Nelson and Jepson-Thomas, 2003) and was considered as a range of theories to explain occupation as a complex construct consisting of many interrelated concepts.

The definition at the centre of the framework is his view that:

*Occupation is a dynamic relationship among an occupational form, a person with a unique developmental structure, subjective meanings and purposes, and a resulting occupational performance* (Nelson and Jepson-Thomas, 2003, p. 90)

To expand, the **occupational form** is the pre-existing structure, that is the physical and sociocultural circumstances which are independent of and external to a person at a particular

time. The individual's **occupational performance** (the doing) is understood only in terms of the occupational form in which it takes place. The occupational form guides, structures or elicits the person's performance. (Nelson and Jepson-Thomas, 2003; Nelson, 1988)

As mentioned above, the occupational form is a specific environment in which a specific occupational performance is or will take place. The typology that Pierce (2001b) explains for the culturally understood 'activity', Nelson (1988) calls a medium, or a hypothetical set of occupational forms that vary from circumstance to circumstance. He gives the example of weaving as a socio-culturally defined medium which can vary depending on the materials (loom and thread), environmental surround (home, school, work), human context (instructions/instructor, other weavers there or not) and the temporal context (Nelson, 1988).

Additionally, the person engaging in the occupational performance is not part of the occupational form, neither are their thoughts and feelings about their performance. The occupational performance is not only dependent upon the occupational form, it is also dependent upon the person, and their unique developmental structure – which consists of their sensorimotor, cognitive and psychosocial abilities and characteristics which have been developed over time. The meaning that the individual ascribes to an occupational form is also unique to them. Based upon their observations and their past experiences; the meaning could be in line with sociocultural norms or not. It is dependent upon their unique interactions with the occupational form from their own perspective. It is purpose, or motivation, which provides the energy for occupational performance; 'When a person with a unique developmental structure interprets the occupational form (meaning), he or she often wants to do something about it (purpose)' (Nelson and Jepson-Thomas, 2003, p. 106).

The definitions of occupational form and performance are considered as complementary to each other and one cannot be understood without the other. The occupational form is the something that is to be done, in terms of providing the environment, materials, instructions and so forth, and the occupational performance is the doing. Both form and performance are necessary in an occupation. Interestingly, this framework does not allow for an evaluation of a group or shared occupation. Each person involved is experiencing a different occupational form, different meanings and a different sense of purpose (Nelson and Jepson-Thomas, 2003), which arguably adheres to theoretical integrity, but could be alienating to some occupational scientists and therapists who feel that the individualistic nature of western theories are not supportive of other cultures' ways of doing and being (Hasselkus, 2011; Hammell, 2009a; Pierce, 2001b).

Another issue with this definition is his decision not to use other terms related to occupation. This means there is no hierarchy unlike many other definitions, where occupations are made up of

activities, which in turn are made up of tasks. This is part of Nelson's attempt to simplify the language of the profession and make it clear what the profession is about i.e. occupation (Nelson and Jepson-Thomas, 2003). Consequently, rather than introduce other terms which he considers confusing, Nelson has opted for the term sub-occupation to describe identifiable smaller occupations contained within a larger whole. The example he gives is the occupation of doing the laundry, with sub-occupations of gathering the clothes, operating the washing machine, operating the dryer, and so on. He suggests that each of the sub-occupations could then have sub-sub-occupations, so operating the washing machine could mean putting the clothes into the machine, putting in the cleaning materials, selecting the appropriate controls and emptying the machine. It could be that decisions regarding 'what is a sub-occupation of what' in a person's occupations is based on their perspective, or it may be that a socio-cultural norm would apply (Nelson and Jepson-Thomas, 2003), depending on the purpose of the assessment. The most obvious critique of this approach is that it could be equally as confusing and unclear as hierarchical definitions even if it does uphold the integrity of the centrality of occupation.

With regard to how well this particular definition has fared in terms of adoption by other theorists, similarly to Wilcock (2007) (see below), parts of it have become absorbed into therapists' vocabulary, so frequently the term occupational form is cited. However, the actual meaning can be slightly skewed (see Hocking, 2009, where she equates Nelson's description of form to Pierce's (2001a) description of activity). If it is not cited as part of the overall definition of occupation it does not entirely make sense because form and performance are complementary and necessary to each other within the performance of an occupation in Nelson's (1988) theory.

In her analysis of literature around occupation as a central concept within occupation, it is interesting that Hocking (2000) chose to separate out the 'processes of occupation' from the 'elements of occupation', her decision is guided by the theory developed by Nelson (1988) in which she separates occupational form from occupational performance. Other authors, as well as Nelson, would consider these to be inseparable i.e. the experience is always part of, or the main element of occupation (see Creek, 2010; Wilcock, 2007; Pierce, 2001a).

Hocking (2000) also identified that the main sources for the definitions of occupation were either 'formally proposed definitions' or research findings. She noted that research into occupation was mainly focussed towards a particular occupation, rather than occupation per se – for example Hannam's (1997) research on tea drinking.

The definition she reaches following her review states:

*To summarise, the essential elements of occupation commonly identified within occupational science are that it is culturally, temporally and ecologically contextualised,*

*and that it has a purpose or goal which may differ from received cultural ideas of its purpose. It is understood to be subjectively experienced and the product of human capabilities. (Hocking, 2000, p.61)*

This quotation again resonates with Nelson's (1988) idea that a person has a unique developmental structure which impacts upon how they engage in occupations. This concurs with most of the influential theorists in the understanding of the experiential nature of occupation, but does not go as far as Pierce's work (2001a) where occupation *is* the experience (see above).

## Wilcock

Ann Allart Wilcock is one of the most respected and prolific occupational scientists of current times, credited with aiding in the development of occupational science as an international discipline, who founded the Journal of Occupational Science and was the Inaugural President of the International Society of Occupational Scientists. Her Occupational Perspective of Health theories have had a considerable impact upon thinking within the occupational therapy profession. She is included here because of her influential viewpoint on the definition and elements which combine to form occupation, which offer a rich, experience based and adaptive/developmental view of the concept. There have been recent attempts to examine the impact of her work on the profession of occupational therapy and to distil the knowledge base of her theory through a critical analysis of her work and its evolution over time (Hitch, Pépin and Stagnitti, 2014a; Hitch, Pépin and Stagnitti, 2014b; Kosma, Bryant and Wilson, 2013). Her work, and that of Pierce, have been a major influence on how I view occupation, both at the specific, experiential level, and at the more macro level.

Hitch, Pépin and Stagnitti (2014a) recognise that although the Occupational Perspective of Health (OPH) theory has not necessarily had great direct impact upon day-to-day practice, the core concepts of the OPH seem to have become part of therapists' vocabulary. The Occupational Perspective of Health builds on a review of historical data from a variety of sources, including archaeology and evolutionary biology, (Wilcock, 2007) using a history of ideas method (Hitch, Pépin and Stagnitti, 2014a). Wilcock (2007) states:

*As I asked questions of the past, my reward was glorious: an absolute assurance that survival and health are and always have been utterly dependent on what people do. ... the evidence is clear that survival and health are intimately related to people's form, structure and capacities in relation to their environment. These are inherent in and responsible for the particular occupational nature and needs of all people (p. 5)*

The certainty that Wilcock (2007) perceived from the evidence enabled her to provide the version of the Occupational Perspective of Health occupational scientists and occupational therapists seem to be familiar with. This is her theory about the health relatedness of the occupational nature and needs of people: doing, being, becoming and belonging are essential to survival and health, or  $d+b^3=sh$  (Wilcock, 2007). The belonging element has been considered an important new addition to thinking about occupation (Wilcock, 2007; Hammell, 2004(b); Rebeiro *et al.*, 2001) since it signified the connectedness of people to other people as they engage in doing, and recognition of the substantial role of relationships in maintaining health and well-being (Wilcock, 2007).

These elements of occupation ( $d+b^3$ ) are, for Wilcock, integrally linked to health and are chosen as a way to discuss the meaning given to occupation in relation to health (Wilcock and Hocking, 2015). Figure 1 below sets out the main characteristics of each of the four elements of Wilcock's definition of occupation, as discussed by four sources; Wilcock's newest version of her OPH (Wilcock and Hocking, 2015); Hitch, Pépin and Stagnitti, 2014a, which gives a summary of how the dimensions are represented and used by Wilcock and by others citing her work; Hammell (2004a) which also includes discussion of what each dimension means; and finally Hammell (2014) which includes a more detailed discussion of the concept of belonging, acknowledging that connectedness in occupational engagement has long been ignored or forced to fit into categorisations of occupation to which it clearly did not (Hammell, 2009b).

These are dimensions not categorisations of occupation, within which to divide time allocations. Wilcock has suggested that a dynamic balance between doing and being is central to healthy living and the becoming dimension is dependent upon both (Wilcock, 1999b). Hammell (2009b) suggested that the definition of occupation based around meaning, so  $d+b^3$ , could be used in conjunction with her tentative experienced based categories of occupation, which are discussed in the next section, to evaluate occupational balance.

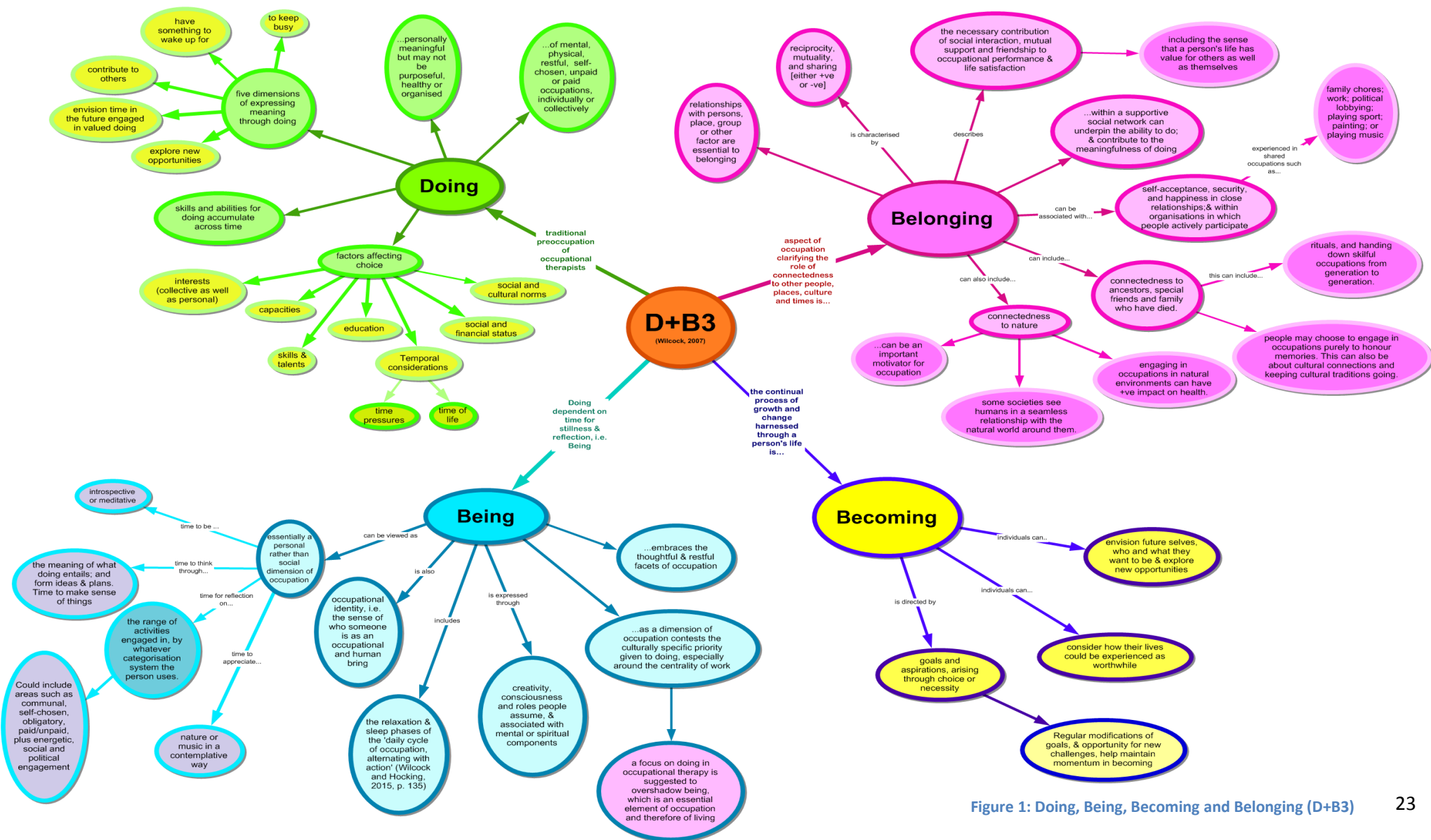


Figure 1: Doing, Being, Becoming and Belonging (D+B3)



## Hammell

Karen Whalley Hammell has published work since 2004 calling for changes to how occupation is defined by the profession, particularly in terms of categorisations. She has developed some suggested categorisations of her own, which have evolved from research she has conducted into the occupational lives of people with spinal cord injuries (Hammell, 2004b), and also from her reviews of the literature. She is supportive of the dimensions of occupation proposed by Wilcock (1999b) and developed further by Rebeiro *et al.* (2001), which have now been developed into the Occupational Perspective of Health theory by Wilcock (2007) of 'Doing, Being, Becoming and Belonging as essential to Survival and Health' or  $D+B^3=SH$ .

Hammell (2004a) begins her challenge to the accepted theories of occupation underpinning occupational therapy practice with a paper drawing on literature from 'philosophers, social scientists and occupational therapists [to]...argue for a renewed understanding of occupation in terms of dimensions of meaning' (p. 296). She explores the concept of occupation as it relates to the experience and expression of meaning in people's lives. Before doing so she clearly challenges the status quo by suggesting that current theory is unable to address meaning in people's lives, when this is what clients with long term conditions consistently raise along with values and purpose (Hammell, 2004a). She believes that incorporating spirituality into the Canadian Model of Occupational Performance (Townsend *et al.*, 2002) was an attempt to overcome some of this inadequacy by building personal meaning into the centre of a practice model. This resonates with Wilcock's (2007) suggestion that a focus on *doing* within the profession is undermining the *being* element for clients. The main deficiencies Hammell (2004a, p. 297) sees with the traditional three categorisation approach are:

- The order categories are listed in [self-care; work/productivity; leisure] suggests a hierarchy which supports the Western viewpoints of what is important, and states 'categorizing the occupations of others is not a neutral enterprise but value-laden and inherently political'.
- People who are unable to engage in productive occupations, through no fault of their own, could feel excluded and isolated from society. Focussing on these categories within occupational therapy could be alienating to clients and therapists could be seen as 'agents of the state'
- Occupations about expressing love, sharing of oneself and the concept of connectedness, also co-occupations, do not fit within the categories
- Occupations labelled by one person as leisure could be labelled by another as productivity, or the same person could label an occupation differently at different times

depending on their mood, who they were doing it with and so forth. She therefore considers that the three categories are 'unstable' in theoretical terms.

Hammell (2004b) applauds the fact that the recent incorporation of qualitative methods into occupational therapy research has enabled exploration of different ways of understanding occupation, allowing for the possibility of the perspective of diverse client groups to be included. Hammell (2004a) posits that themes generated from diverse studies show that occupation is best understood by 'dimensions of meaning'. Four dimensions were suggested as contributing to a life worth living in her research following disruption to individuals' life narratives following a spinal cord lesion. These dimensions were meaning, purpose, choice/control and self-worth (Hammell, 2004b). Wilcock's theory of occupation, dependent upon meaning rather than purpose, i.e. that occupation is the synthesis of the dimensions of doing, being, becoming and belonging (Wilcock and Hocking, 2015), could encourage further development of experience-based categorisations of occupation to support these dimensions.

By 2009(a) Hammell widened her criticism of the categorisations of occupation within the profession, to include observations regarding the lack of evidence to support some of the main assumptions within the profession, and how the longevity of these unsupported claims and theories have been achieved. In her challenge to the professional knowledge base, she poses the question, 'should our theoretical base be informed by unchallenged assumptions or by evidence?' (p. 6) She suggests that some of the core assumptions of occupational therapy are culturally specific – not universal, contestable and have accumulated in the absence of supporting evidence (Hammell, 2009a). She cites Mocellin (1995) who noted that professional knowledge in occupational therapy was made up 'primarily of a collage of 'quotes' derived from distinguished and respected occupational therapists' (p. 7). It is suggested that the profession has 'sacred texts' with their guardians – the devoted followers of respected theorists – whose assumptions and beliefs have similarities to the dogma of a fundamentalist faith, with the uncritical acceptance of the beliefs. She contends that occupational therapists must 'think more critically and become aware of the value patterns and assumptions embedded in their theories' (Hammell, 2009a, p. 7).

Hammell (2009a) has a valid point regarding the lack of evidence, and the flaws in the current terminologies used in relation to occupation. However, in her attempt to underline the point regarding the minority status, in terms of population, and perhaps cultural impact of the Western viewpoints and assumptions, she, herself, does display some overly negative views of life in the 'majority world' as she terms it. When exploring one of the professions assumptions – that humans can positively influence their health using their hands and will power – she points out that there is an ableist element to this as not all people have hands to use. However, the point

she also makes about the lack of choice, control or opportunity for meaningful occupations is over-stated. She suggests that people's own actions may make little or no difference as the social and political constraints in their countries and regions preclude this. Whilst there are these factors in play, she is not acknowledging the impact of *their* belief in their own choice and control and how this affects their sense of well-being despite the contextual constraints (Hayward and Taylor, 2011), a mitigating factor which allows for enjoyment and acceptance of that life, however 'associated with unremitting drudgery' (Hammell, 2009a, p. 8) it may appear to others.

She also reasserts her views on the 'privileged triad' of categories of occupation – self-care, work/productivity and leisure. Her strongest objection is still to the exclusion of activities motivated by love, care of others and a sense of connectedness to other people. Hammell (2009a) sees this as a reflection of the Western culture's 'doctrine of individualism' (p. 10), which is not reflected in other cultures, where reciprocal obligations and harmonious relationships are valued (Hammell, 2009a). She notes that other research in the Western world has also found that interdependence is a desirable state and that the ability to contribute to others is associated with health benefits; suggesting that occupations involving interdependence support health and well-being (Hammell, 2009a).

Alongside this challenge to the evidence base, Hammell (2009b) undertook research into the quality of life experienced by people with complete high spinal cord injury. Her qualitative data analysis found that engagement in occupation was extremely important to the participants, but their experience 'did not fit neatly into the categories of self-care, productivity and leisure' (p. 108). Given that researchers from other disciplines and research on other health conditions were coming up with similar findings to her own, she proposed that occupation should be understood in terms of the qualities of experience clients describe, rather than the unsupported categories favoured by some theorists.

Hammell (2009b) suggests four tentative categories, which could be viewed as starting points for researchers in this field. The four categories of occupation address intrinsic human needs – meaning, purpose, choice and control, and a positive sense of self-worth. The categories are: *restorative occupations; ways to connect and contribute; engagement in doing; and ways to connect the past and present to a hopeful future*. The final category is interesting as Hammell (2009b) suggests that occupations reflecting life continuity and hope for the future are unlikely to be identified as important by people who believe their lives to be predictable. Experiencing or achieving biographical continuity or life coherence so that occupations enjoyed in the past and/or present are seen as continuing in the future, only comes to the fore if there is a transition of some description meaning it could be difficult to achieve.

A further point Hammell (2011) makes in regard of definitions of occupation, relates to the call by some occupational scientists for consensus, both philosophical and conceptual. She strongly rebuts this call. As the dominant theories reflect Western perspectives, any consensus reached would assume that these Western perspectives are universal or that other cultures and perspectives would agree conform to the Western agendas (Hammell, 2011). Their adoption as a consensus position, whilst a sign of stability, which could demonstrate a coherency to the stated principles of the discipline, could lead to intellectual confinement and stagnation. Hammell (2011) believes theoretical consensus is not legitimate when a 'diversity of opinion' has not been sought. This strengthens the argument made by other theorists (e.g. Nelson and Jepson-Thomas, 2003) that a diversity of theory, along with continued open dialogue, is preferable to theoretical homogeneity.

Hammell (2011) also echoes Wilcock's (1999b) stance regarding human well-being and occupational therapy's position in enabling this. The current, more individualistic, views of occupation, which are favoured in the literature, shape and limit occupational therapists' concerns (Hammell and Iwama, 2012). This means that occupational therapists are not exploring ways in which the self and the environment are experienced, perhaps as integral and inseparable, during occupational engagement; nor researching occupation as a shared experience; nor acknowledging that human well-being cannot be achieved without considering all the conditions impacting upon occupational engagement. It is suggested that occupational therapists are stuck in a 'comfortable rut' (Wilcock, 1999b, p. 7) and are therefore not using an occupational perspective of health.

There has been some research in the field to provide deep understanding of certain individual occupations, their components, contexts and execution, but there has been little research looking at purely defining the key term itself (Nelson and Jephson-Thomas, 2003). Hans Jonsson is one author who has taken the idea of experiential definitions and dimensions of occupation into empirical research, with older people, making his work pertinent to this study.

### Jonsson

Hans Jonsson has engaged in extensive research regarding the occupational balance of older people. First through his solo PhD theses and then through leading a 10-year longitudinal study of 32 Swedish workers, which explored occupations and transitions from worker to retiree, and beyond. In the latter study, data was collected at four points as the participants went through this transition, beginning with narrative interviews at 63 years (when still working) (Jonsson, Kielhofner and Borell, 1997), then 65-66 years (when the majority were in early retirement) (Jonsson, Josephsson and Kielhofner, 2001; 2000; Jonsson, Borell and Sadlo, 2000), then at 70-71

years, when participants were more established in retirement. A final set of data was collected at 73 years old (Jonsson 2008).

Working through this research project, and the qualitative data generated, led Jonsson (2008) to conclude that the term occupation should be reconceptualised 'based on empirical data of narrated human experience' (p. 3), particularly in relation to the categories that are ascribed to the different types of occupations. Like Hammell (see 2004b), Jonsson felt that these categories needed to be based upon people's experiences rather than societally and politically generated categories such as work, leisure and self-care. Although he acknowledged these were a legitimate way to consider occupation at a societal level, e.g. to gather information about numbers of people who are unemployed in a society or community, Jonsson (2008) did not consider them appropriate at an individual level, when 'occupation is related to human development, health and well-being' (p. 3).

In his 2008 paper, Jonsson presented the seven experience based categories of occupation which had emerged from a secondary analysis of the data collected at various points in the ten-year longitudinal research study:

1. **Engaging:** these occupations stand out as very important to the individual if present
2. **Basic:** the 'must do' things, routine for fulfilling basic needs – getting food, cleaning, sleep
3. **Social:** where social interaction with other people was the main purpose
4. **Relaxing:** the purpose was just relaxing – reading a paper, doing crosswords, watching tv
5. **Regular:** done once a month, once a day, but with no real engagement – daily walks, church
6. **Irregular:** chose to do and find positive meaning in doing – going to movies, holiday
7. **Time-Killing:** something to make the time pass, lack of real engagement

It is interesting that Jonsson (2008) started his analysis by identifying the 'engaging' category of occupation, as this relates closely with a framework of flow theory which evolved from his previous research (Jonsson and Persson, 2006). Flow theory is a theoretical model used to assist with understanding *optimal experiences* (flow) in human behaviour, and focuses on the dynamic interaction between the person's skills and the challenge of an occupation (Csikszentmihalyi, 1993). Optimal experiences are captured via the Experience Sampling Method (ESM), through which participants provide snapshots of their occupational experiences by writing down what they are doing, in what context, and how they are feeling each time a pager is activated (Csikszentmihalyi, 1993). These snapshots rate the amount of challenge (high-low) in an occupation and the degree (high-low) to which the occupation uses or requires their skills (Jonsson and Persson, 2006).

Considering *challenge* and *degree of skill* together, different categorisations of experiences can be made. An optimal experience, or flow, requires high challenge and high skills and this match leads to a narrowing of attention on a clearly defined goal, to the point where a person becomes lost in the activity (no attention is given to personal and distracting worries. Csikszentmihalyi (1993) gives the example of a rock climber who would very likely fall if he were to lose concentration by worrying about his relationship with a significant other whilst hanging by his fingertips over a void). Additionally, when experiencing flow, self-consciousness disappears and the sense of time is distorted (Csikszentmihalyi, 2002). Flow is so enjoyable, it is suggested, that people want to repeat it purely for the experience of it, and there is less concern for the end-product of their engagement.

Jonsson and Persson (2006) present Csikszentmihalyi's original eight channel model for rating a person's challenge vs. skill in an activity and then focusses on a condensed model with three interdependent dimensions of daily experiences in occupation (Jonsson and Persson, 2006). The categories Jonsson (2008) eventually arrives at through analysis build upon his previous research using the three dimensions of experience. Below is a diagram (Figure 2) depicting the three dimensions of experience, with explanation following.

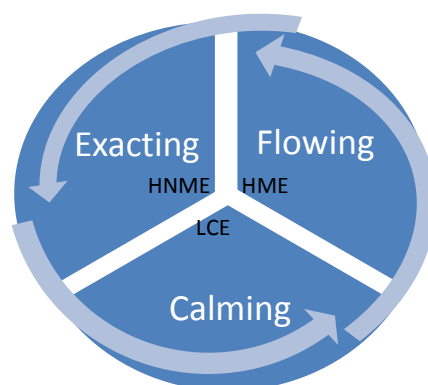


Figure 2: A Model of Occupational Balance: Three Dimensions of Experience

The first of the three dimensions, **Exacting** experiences of everyday occupation, describes high challenge that cannot be matched with high skills, so occupations which exceed the person's level of skill (High-Not Matched Experience (HNME)). These experiences are suggested as necessary sources of personal development and can trigger new flow experiences as the dynamic process continues.

The second dimension, **Flowing** experiences of everyday occupation, describes highly and/or moderately challenging experiences that are matched with high skills (High-Matched Experience (HME)). Flowing experiences are a source of intrinsic rewards and feelings of competence.

The third dimension, **Calming** experiences of everyday occupation, describes low to moderate challenges that do not require high skills, so experiences of relaxation, boredom or apathy (Low Challenge Experience (LCE)) (Jonsson and Persson, 2006). These, it is suggested, are needed to recharge people's batteries and for purposes of relaxation.

As mentioned above, Jonsson (2008) started his conceptualisation of occupation with the identification of **engaging occupation**, and states that this category of occupations was special, standing out from the other occupations in the participants' experiences and involved intense participation both in duration and regularity. This seems to be very close to describing flow a **Flowing** experience of occupation in the three-dimension model. There are, however, some other elements woven in, which suggest that the narratives of the retirees had allowed for consideration of the arena of the occupation, e.g. home/family, work, leisure, occupational form, pattern, occupational identity and communities of interest. Another point he makes is that where a person does not have an identifiable *engaging* occupation, they often compensate for this by having a **social occupation** as their main occupation instead. Csikszentmihalyi (2002) asserts that socialising fulfils all the requirements to provide an optimal experience, the challenge being to interact effectively using interpersonal skills. A person will experience flow, depending on how matched the skills and challenge are. This implies that a social occupation within this categorisation could also be an engaging occupation, and this is a possible weakness of this categorisation theory.

Jonsson (2008) suggests that capturing data on solely the relationship between challenge and skills might not be appropriate when considering the full range of human occupations, however, conceptualising occupation through arenas (work/leisure/self-care) or form (pre-existing structure/rules for a specific occupation) is also limiting and could be seen as using non-inclusive in terms of language. Jonsson (2008) offers his conceptualisation of occupation as a suggested direction for further empirical research, not as a fixed taxonomy. Jonsson's (2008) categorisations of occupation by experience is of high relevance to this study, and could provide an interesting range for the consideration of occupational balance instead of work/productivity, leisure and self-care. Certainly, the Jonsson and Persson's (2006) experiential model of occupational balance offers a noteworthy alternative to categories of occupation, and proposes that 'health is underpinned by a dynamic balance of flow and qualitatively different occupational experiences' (p. 64).

## Research

As noted previously, research into the definition and core inclusions within the concept of occupation is sparse, this was a primary reason for the inclusion of Jonsson as a key contributor above. As he has engaged in this research with older people his work is especially relevant to my

current study. The other empirical studies focussing specifically on original research seeking to define occupation, or categories/ components of it (not just about a specific occupation), were a three-part study undertaken by Müllersdorf and Ivarsson (Müllersdorf and Ivarsson, 2011; Ivarsson and Müllersdorf, 2009; Müllersdorf and Ivarsson, 2008), two studies from the late 1990s (Rudman, Cook, and Polatajko, 1997; Townsend, 1997) and one more recent study (Reed, Hocking and Smythe, 2010). I will give a brief summary of this research content, especially that of particular applicability to this study.

Müllersdorf and Ivarsson (2011; 2008; Ivarsson and Müllersdorf, 2009) researched definitions of the term by occupational therapy students and therapist. The definition derived from the studies was: *Occupations are consistently performed and are all the things humans do. All human occupation is performed within the influence of current values within a time and place which could influence performance through physical and sociocultural aspects.* This definition remained constant across the three studies, however in part two, they did note that the participants questioned whether all things that people do had to have meaning for them (e.g. watching television), to be considered occupation. In part three of the study, the therapists questioned whether people always had choice in relation to the occupations they engaged in. This does demonstrate a difference between this consideration of occupation and some non-research based definitions, which assert that occupations are meaningful to a person and in the case of Hinojosa *et al.* (2003, p. 1) they are represented as ‘self-directed’ and ‘personally initiated’.

Rudman, Cook, and Polatajko’s (1997) study explored the characteristics and potential of occupation in relation to well-being and was empirical research using semi-structured interviews with 12 older people living in the community. The categorisations for occupation which emerged from this study were *social, physical, and mental* doing. Interestingly, watching the TV was, overall, not considered an occupation by the participants, similar to the findings of Ivarsson and Müllersdorf (2009 – the second study of the three). The findings which were of interest to the study of occupation was that the participants at no time categorised the occupations by the often-used self-care, work and leisure labels. They also noted that the participants rarely talked about self-care activities, which is often the focus of occupational therapy practice. Rudman, Cook and Polatajko (1997) suggest that possibly when healthy people are asked to talk about what they do, ‘the occupations that have meaning for them are rarely at the level of the basic occupations, such as grooming or dressing’ (p. 646). The older people involved in this project discussed personal control as being an essential condition of occupation – they expressed this as a need for choice, despite whatever contexts might be making it difficult for them to exert that control. This research supports some of the previous definitions of occupation, in which the



central role of engagement, personal meaning and control have been core. It also links to psychological needs based ideas of well-being (Ryan and Deci, 2000).

Townsend (1997) explored occupation as an active process and its key features. Her definition of occupation is that:

*occupation is the active process of living: from the beginning to the end of life, our occupations are all the active processes of looking after ourselves and others, enjoying life, and being socially and economically productive over the lifespan and in various contexts. Our potential as active, human agents lies in these multiple ways of occupying life. (p. 19)*

According to Townsend (1997) there are four key features of the active process of occupation which can illustrate its potential for transformation. These key features include a temporal pattern and meaning, plus a feature related to having choice and control, these inclusions bring this close to some of the current definitions relating to occupational balance

In the final primary research project rather than studying the full definition of occupation, Reed, Hocking and Smythe (2010) focussed on **meaning**. This is frequently discussed within literature as either a required component for an activity to be classed as an occupation, or as a motivation for engagement in occupation. Their findings suggest that the meaning of occupation is shaped by the dynamic interplay between three essential themes which arose from the study, along with a clear understanding that the meaning of occupation lies in the 'complex interconnectedness between the person, the world and others in the world.' (Reed, Hocking and Smythe, 2010, p. 144) The interconnected themes were: 'the call'; 'Being with' and 'Possibilities'.

The main points of interest for the current research study are that both 'the call' and 'Being with' relate the meaning of occupation to social responsibility or connection. As such they relate to the belonging element of Wilcock's (2007) theory of occupation, demonstrating how important social relationships and social doing are in terms of meaningful engagement. There is research which suggests that people gain benefits from engaging in certain activities because of the social aspect, rather than for the actual occupation itself (Litwin and Shiovitz-Ezra, 2006). Hannam (1997), however, researched the meanings constructed by women engaged in making and drinking a cup of tea, and contends that everyday occupation plays a dynamic role in maintaining a person within a 'meaningful social world' (p. 73). It is suggested that the doing linked to the socially shared meanings which make occupations engaged in with other people so important to individuals. Reed, Hocking and Smythe (2010) also draw attention to the, sometimes dramatic, change in meaning that could occur depending on who was also involved in performing the occupation, the absence of particular people positively or negatively impacting on meaning.

The final theme in this research is '*possibilities*' as a dimension of meaning. This shows itself in the way occupation connects the past to the present and the future. Experiences in the past influence the present which will influence the future, and all will have connected meaning 'as people traverse the continuum of time' (Reed, Hocking and Smythe, 2010, p. 145). It is through their occupations that a person shows others what they are capable of and how far they conform, or not, to what others (society) dictate as acceptable (Christiansen, 1999). It is the response others relay back to an individual which makes them aware of the possibilities that open up to them and those that close down. Reed, Hocking and Smythe (2010) suggest that there is a constant movement between the old and new 'self' on a journey towards who a person is *becoming* (Wilcock and Hocking, 2015), and the possibilities opened up or closed down through engagement in occupation influence this process of becoming. Whilst they do not make the link explicit, this dimension could also influence feelings of a sense of *belonging* (Wilcock and Hocking, 2015). The expression of self, through engagement in occupation is particularly important when considering older adults who have, or are about to retire. Their identity through what they do is changed at retirement, and within a Western Society this is not necessarily a good experience.

### Concluding Thoughts on Occupation

Whilst there are academic calls for a consensus definition of occupation to be developed, most authors contributing to the debate felt that a consensus would be a bad idea and would stifle creativity. Wilcock (2001) sums up the argument well:

*'We can only benefit from diverse growth and the development of a multiplicity of ideas. Then instead of adopting other disciplines ideas in entirety, we can view and analyse them from our own occupational perspectives and offer distinct opinions to not only our traditional client group but also the general population, as well as to the political, medical and social planners. This is what our founders intended to happen from the first if we had not mislaid the keys' (p. 416)*

One area where there is a strong divergence of ideas is around the inclusion of activity as part of the defining occupation, with some authors wishing to remove activity altogether (Nelson, 1988), others insisting that occupations are made up of activities (Creek, 2010) and some that activity is a typology, a class of action, with occupation as the actual experience (Pierce, 2001a). Fitting with a constructivist outlook, the Pierce (2001a) definition of occupation as the actual experience fits well with my work, alongside an understanding of occupation as a synthesis of doing, being, belonging and becoming(D+B<sup>3</sup>) (Wilcock, 2007), which sits well with the profession's humanist grounding (Maslow and Lowry, 1999).

Another point to emphasise about occupation is the impact of context, most importantly is possibly the social context when considering older people at the transition into retirement as discussed in chapter one, this can lead to reduced feelings of self-worth and loss of occupational identity, with the social environment giving possibly negative feedback. Social groups an individual identifies with, assign value to the occupations in which they engage, the way self-identity is perceived by others is shaped by how a person's occupations are viewed and valued within their culture. Not conforming, either through choice or through reasons outside of a person's control, could mean loss of some valued group identities, a loss of a sense of belonging, change of self-identity and to their self-image, and emergence of the new 'self'. If this has been brought about by choice, the consequences are, perhaps, easier to deal with. Magnus (2001) conducted a qualitative study in Norway, interviewing ten women who were facing disabilities as adults, whose occupational engagement and identity were at risk due to this. The participants engaged in a range of strategies to avoid loss of identity and one of these was to prioritise occupations which were derived from their notions of self-identity as a woman – so being a mother, housewife and an attractive woman. By giving preference to these occupations, the women could 'emphasise their similarity with Norwegian ideals of femininity rather than their differences from other women' (Magnus, 2001, p. 122). This gave the opportunity for more possibilities to remain open for them, and for their new 'self' to have a positive sense of becoming and of still belonging at a societal level. As Magnus (2001) suggests it can be a 'strategy to prevent stigma and further devaluation' (p. 122).

COT (2006, p. 4) state that:

*In the eyes of the world, and in our own eyes, we are largely what we do...If an individual is unable to [engage in] activities in a way that is satisfactory and appropriate to her/his time of life, then that person will suffer decreased self-confidence, feelings of isolation, uselessness, depression and anxiety*

This viewpoint again emphasises how vulnerable individuals could be to loss of self-identity with loss of occupation. The suggestion that 'we are what we do' seems to buy into the positivist notion of occupation, within society, where it is considered synonymous with work (Townsend, 1997). It is a label with which people describe themselves – teacher, plumber or traffic warden – and society can be unforgiving to those who are unable to be economically productive in an expected way. Townsend (1997) suggests that perhaps there needs to be an expansion in society's ideas of social and economic productivity such that the market-place does not dominate life as it does currently. When the personal and social value of occupations can be recognised as well as the economic, then health and justice could be achieved for all. This might reduce barriers and negative feelings for those who do not conform to the current societal classifications of worth

through earning power. This could include older retired people who may no longer necessarily fulfil an economic role, but could be very socially productive. Some argue that an economic perspective of life has been imposed on everyone within Western cultures (Wilcock and Hocking, 2015), and could be a contributing factor to the ageism noticeable in Western societies (Townsend, 1997).

Based on these arguments, older people are in a situation where they may have lost their identity to a certain extent at the point of retirement, if they identified strongly with their employed self and are in the process of developing a new self. How much continuity that self has with the 'old self' including: how much of their occupational experience from before retirement they can continue post retirement; what new avenues open to them; and how well they have adapted to the change in occupational pattern, could impact greatly upon their sense of well-being and belonging within their community. Their ability to do, be, belong and become are all impacted by retirement and the way society views them at that point in their lives. It is argued that continuity of occupation and adaptation are needed to ensure an acceptable transition into retirement.

In the preceding discussions of definitions, it could be seen that Wilcock's theory has permeated much of the work being undertaken around defining occupation to a lesser or greater extent. The acknowledgement of meaning, social context, interdependence, and temporal continuity alongside the action component all can be traced to the Wilcock theory, particularly being and becoming, as belonging was a later addition to the theory (Hitch, Pépin and Stagnitti, 2014a; Hammell, 2014; Reed, Hocking and Smythe, 2010; Ivarsson and Müllersdorf, 2008; Hammell, 2004a; Creek, 2003; Hocking, 2000).

This acceptance of the interpersonal elements of occupation as important to everyday engagement should also be evident in discussions of the related term of occupational balance. The concept of occupational balance is the centre of this study which is exploring it as it is experienced in later life. The following section will examine occupational balance, how it is defined, experienced and researched within the field of occupational therapy and occupational science.

As stated earlier, the importance of looking at different definitions of occupation in relation to this study stem from the fact that the choices of how occupational balance is defined and attempts made to measure it, are based upon the definitions of occupation held to be most 'true' to the profession by the researchers and the categories, dimensions or elements related to that definition are used as a basis for data gathering and analysis (see Dur *et al.*, 2014; Eakman, 2014; Wagman and Håkansson, 2014a; Wagman and Håkansson, 2014b; Wagman, Håkansson and Björklund, 2012; Eklund, Erlandsson and Leufstadius, 2010; Forhan and Backman, 2010; Stamm *et*

*al.*, 2009; Erlandsson and Eklund, 2006; Håkansson, Dahlin-Ivanhoff and Sonn, 2006; Jonsson and Persson, 2006; Jonsson, Borrell and Sadlo, 2000; Wilcock *et al.*, 1997)

## Occupational Balance

Moving on, this section is going to examine occupational balance. It will start by looking at the place of occupational balance in occupational therapy practice and literature, and how this relates to definitions of occupation. It will consider how it links with other concepts, such as lifestyle balance and work-life balance and how previous studies have defined and measured occupational balance. It will consider the possible consensus picture of the key elements of occupation balance used within occupational therapy and occupational science studies, and how this has developed over time.

Creek (2003, p. 8) states that the outcome of occupational therapy intervention should be ‘that the client achieves a satisfying performance and balance of occupations’, and that this supports ‘recovery, health, well-being and social participation’. Not all theorists and clinicians would articulate this as the specific overarching intervention goal. However, occupational balance will be the outcome of intervention if, as expected, a client leaves a service satisfied that they can continue to live their life effectively and participate as they choose. In that instance, occupational balance has been achieved, or restored, for that client, impacting on their health and well-being. This certainly demonstrates the centrality of the concept of balance to the profession, and it could be viewed as either an essential element of well-being (Matsuka and Christiansen, 2009) or a pathway to achieving well-being (Creek, 2003) depending on which theoretical viewpoint is held.

If, as Wilcock (2006; 1999a; Wilcock and Hocking, 2015) advocates, an occupational perspective of health is taken, and the occupational therapy profession moves more into the arena of public health and health promotion, the skills to assist clients to achieve occupational balance could be a strategy for promoting health through lifestyle change (Christiansen and Matsuka, 2006). These are the skills and insights that Meyer (1922), at the inception of the profession, also suggested could be of use to the general population and not just those with physical or mental health needs. Wilcock and Hocking (2015) and Christiansen and Matsuka (2006) make the point that these theories have not yet been influential in designing public health initiatives in the West. This is possibly, in part, because modern medicine has become adept at treating the ailments (cardiovascular, respiratory, obesity, cancer, sexually transmitted diseases, and mental health conditions) triggered by occupational lifestyle changes in affluent societies. These societies are treating the symptoms without necessarily dealing with the underlying causes (Wilcock and Hocking, 2015; Matsuka and Christiansen, 2009; Wilcock, 1999a).

According to Wilcock (1999a) the causes of these conditions can be linked to occupational risk factors (also noted as examples of occupational injustice) i.e. occupational deprivation, alienation or imbalance.

- *Occupational deprivation*: factors beyond a person limit their choice or opportunity,
- *Occupational alienation*: a person is unable to meet their basic occupational needs or use their talents and capacities because of sociocultural factors
- *Occupational imbalance*: there is an incompatibility between the occupational requirements, the time available and the person's talents and capacities – they can be over (risk of burn out) or under (risk of boredom) -occupied (Wilcock and Hocking, 2015).

Wilcock and Hocking (2015) recognise a link between occupational imbalance and psychological distress such as burnout or depression, and having a high workload with little decision-making power (job strain) is related to cardiovascular disease. They also suggest that obesity could be linked to imbalance in the energy expenditure of daily occupation. For example, a person weighing 121lbs, if working as a typist would be expending on average 1.5 calories per minute, where it would be 3.5 calories per minute if engaged in domestic work. This implies that balance is not just about using talents and capacities effectively, it is also about maintaining health through doing, and understanding how small changes to occupational pattern can impact upon this.

To confidently address occupational risk factors in a health promotion arena, the profession, and science, need to present clear and cogent arguments for an occupational perspective of health and ways to ameliorate the impact of fast moving change in life spheres leading to occupational risk factors. The area of interest for this study is the antithesis of imbalance and considering this in relation to a sample of some of the citizens in the UK at retirement age or beyond.

When reviewing literature on occupational balance, there has been a marked interest in balance in life in recent years. Whether this is phrased as occupational balance; life balance; lifestyle balance; work-life balance; work-family balance or role balance, there is a general sense that there is too much to be done and not enough time within which to do it. Sheldon (2009) suggests that the contemporary consideration of 'time as a resource of increasing scarcity' (p. 63) is one of the main factors fuelling the increased interest in the concept of balance. Certainly, there has been a noticeable increase in research in this area within occupational science from 2006 onwards (Wagman, Håkansson and Björklund, 2012; Sheldon, Cummings and Kamble, 2010).

As mentioned above, there are a range of terms used to denote 'balance' in relation to the activities a person engages in on a day to day basis. Some authors suggest that these terms can

be used interchangeably as the definitions are similar, if not identical. Westhorp (2003) explicitly states that the terms can be used synonymously, and as with choices of definitions of occupation, suggests that the term adopted depends upon viewpoint and research stance of the researcher at that stage. Also, different authors quote definitions interchangeably, for example both Eklund, Erlandsson and Leufstadius (2010) and Wilcock and Hocking (2015) cite Matsuka and Christiansen's (2008) definition of lifestyle balance<sup>3</sup> as a definition of occupational balance - taking a clear stance that the two terms are the same concept. Of note in relation to lifestyle balance, Matsuka and Christiansen's (2008) model suggests that meeting core needs through a 'balanced and satisfactory repertoire of everyday occupations fosters health and well-being, and provides a buffer to stressors' (p. 11). This is predicated on the theory that lifestyles with certain configurations are more likely to promote health and well-being and is prescriptive rather than descriptive of a normative state. Predominantly it is about the use of occupational patterns (based on needs) to enhance health. It is not far removed from Creek's (2003) primary goal of occupational therapy, i.e. the use of occupational balance to support health and well-being as well as recovery. Both Creek (2003) and Matsuka and Christiansen (2008) situate occupational therapy within the public health and health promotion arena through the medium of occupational balance as a means and an end for intervention.

The more dichotomous balance terms –work-life and work-family – tend to originate from research outside of occupational science. *Work-life balance* is a consideration of the time people spend in work as opposed to non-work activities as a two-dimensional concept (e.g. Warhurst, Eikhof and Haunschild, 2008; Moen, Kelly and Huang, 2008), similarly work-family balance. The use of the term 'work', followed by 'life' or 'family', is criticised in that it holds work as the primary part of the equation and of greater emphasis than the other occupations a person engages in (Hammell, 2004a). This has led to accusations of cultural elitism and the exclusionary and alienating nature of using 'work' to balance against 'life', when not all people in a society are able to engage in work, or have now retired from it (Hammell, 2004a). This is contrary to the views of theorists using the term occupational balance, who suggest a much more subjective view of the importance of different areas of a person's daily living (Wilcock and Hocking, 2015; Backman, 2004; Wilcock *et al.*, 1997). Someone of working age may well give work a high importance rating but for older people who may have retired, paid work is not likely to be in the equation, and not all older people replace this with other productivity occupations, such as voluntary work (Jonsson, Borrell and Sadlo, 2000).

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<sup>3</sup> 'a satisfying pattern of daily occupation that is healthful, meaningful and sustainable to an individual within the context of his or her current life circumstances' (Matsuka and Christiansen, 2008 p11)

Similarly, *role balance*, is a perspective that has developed in work-family balance studies (Wada, Backman and Forwell, 2010). The sense of balance comes from satisfaction with how well a person can fulfil the demands of work and family so that all valued social roles are satisfied, and Wada, Backman and Forwell (2010) suggest gender and ideological differences in how this is perceived. The scarcity hypothesis of roles, which has been mooted in relation to feminist research into work-life balance, suggests that there is a finite amount of energy that people can devote to different areas of their lives (e.g. work or family commitments) and it can lead to imbalance if all their energy is devoted to one area (Chapman, Ingersoll-Dayton and Neal, 1994). This imbalance creates stress and conflict and a range of negative consequences to health and well-being. Evans *et al.* (2014, p. 334) took this concept a step further and developed the 'Model of Juggling Occupations'. The definition provided for role balance was again very close to, if not interchangeable with, that of occupational balance bringing to bear the question of why a new balance term was needed, rather than perhaps suggesting an addition of 'roles' to the definition of occupational balance.

Wilcock and Hocking (2015, p. 309) suggest that some researchers may have chosen to adopt some of the more 'common alternatives' to occupational balance to ensure that the concept, itself, is recognised in the ensuing public health and health promotion debates. There is some evidence of cross-profession use of the model of life-style balance (see Davies *et al.*, 2015).

The proliferation of related terms has, however, led to further confusion and attempts by authors of later work to try to differentiate between these related terms by imposing a hierarchy upon them e.g. equating occupational balance with the occupational patterns in the lifestyle balance model, rather than with lifestyle balance itself (Erlandsson and Håkansson, 2009; Håkansson *et al.*, 2009). A temporally based occupational pattern is part of both concepts but is certainly not the only defining quality of occupational balance. This 'downgrading' of occupational balance in some research will only add to the already evident morass of terms and counter terms within the field. The reason that it is even possible for researchers to attempt to match occupational balance to a less complex concept is due to the prevalence of research into it as a simple balance between time spent in occupations within certain categories – i.e. work, leisure and self-care, or variations, displayed as a pattern.

Occupational balance, it is suggested, is not just the pattern of activity; it is also what that means to the person subjectively. A move away from the simplistic representation of this complex concept would prevent further proliferation of related terms. A clear statement of the basic inclusions of balance – if not a consensus on one definition – would prevent errors of understanding and usage. An example demonstrating where the lack of a clear definition of



balance has led to an interesting challenge is the emergence of the related concept of *Occupational Integrity*. Pentland and McColl (2008) consider the concept that:

*truly links the configuration of occupations with well-being is not life balance, but rather it is the extent to which a person designs and lives in integrity with his or her personal values, strengths and attribution of meaning* (p. 136)

They claim that balance is a dualistic (either/or) concept, which involves a person in striving for an elusive life situation. Whilst accepting that the profession understands the value of occupational or life balance as a determinant of well-being, they consider that the effort to 'maintain this tenuous perfect state' (Pentland and McColl, 2008, p. 135) could lead to avoidance of risk, and opportunities to try new experiences, as individuals do not want to 'rock the boat', or threaten their balanced state if they have managed to achieve it. This shows a rather rigid, one dimensional view of the concept of balance. It demonstrates there may have been a bias within the literature they reviewed towards defining balance as an allocation of time across occupations. A range of other perspectives are now evident, which suggest that meaning and integrity are part of the concept of occupational balance and that it is a more dynamic, constantly changing life state (Wagman, Håkansson and Jonsson, 2014; Wagman, Håkansson and Björklund, 2012).

The underlying choices which lead to the configuration of people's occupational patterns are part of the concept of occupational balance in recent work published (Eakman, 2013; Eklund, Leufstadius and Bejerholm, 2009). The extent to which a person designs a pattern and gives it integrity with his or her personal values, strengths and attribution of meaning is part of occupational balance – integrating into one's occupational choices the values which matter most (Eklund, Erlandsson and Leufstadius, 2010). In which case, the following point Pentland and McColl (2008) make in relation to occupational integrity holds as true for occupational balance:

*'The extent to which an individual can design an occupational life that is consistent with his or her values will be the extent to which he or she feels a sense of balance and well-being.'* (p. 136)

As discussed above, the definition of occupational balance preferred by a theorist, researcher or clinician will depend greatly upon their preferred definition of occupation, and the inherent dimensions or categories that come with it. If the definition of occupation chosen does not including meaning, then it is likely that their way of defining and measuring occupational balance based upon that definition of *occupation* will be a simplistic 'time counting' methodology. It will, however, also depend upon their 'own terms of reference' (Wilcock and Hocking, 2015, p. 309) and on the type of research they may be undertaking. Historically there has been a tendency to use more simplistic definitions of occupational balance, relating it purely to time use in certain

categories of occupation (Christiansen and Matsuka, 2006), although some more recent research has taken a more sophisticated approach (Wagman, Håkansson and Björklund, 2012). From my perspective, *occupation* has been shown to be a complex concept and to consider the associated term, occupational balance, as a simple division of a person's time between categories of occupation described by their culturally held properties, with no reflection on subjective meaning, does not seem apt. Its association with the term occupation, which has many dimensions across different definitions, implies there is greater depth to the notion of related balance. Its complexity, therefore, as a central concept for the profession, should not be underestimated.

More broadly, looking at the more current definitions of occupational balance (see for example Sheldon, Cummins and Kamble, 2010; Eklund, Erlandsson and Leufstadius, 2010; Håkansson, Dahlin-Ivanoff and Sonn, 2006), occupational balance is being proposed as a varying mixture of the following three components:

- a temporal component, with several elements incorporated such as time spent in different types/categories/dimensions of occupation; alongside a life span component
- an individual perspective component, again with several elements;
- a contextual component including physical, social and cultural elements.

Backman (2004) sums this up as:

*'A sense of balance is a perceived state involving attitudes, goals and perspectives, interacting with time and the expectations of the sociocultural environment' (p. 203)*

Wagman, Håkansson and Björklund (2012) conducted a concept analysis of occupational balance which included 43 articles. The aim of the analysis was to clarify the content in the concept as used within published articles related to occupational therapy. From that analysis, the definition of occupational balance was proposed as:

*'the individual's subjective experience of having the "right mix" (i.e. amount and variation) of occupations in his/her occupational pattern. This definition can be used from several different perspectives: occupational areas, occupations with different characteristics, and time use.'* (p. 325)

Consideration of occupational balance from:

- The occupational areas perspective would include: leisure, work, rest, sleep.

- The characteristics perspective might include: valued, obligatory and discretionary activities; rest and activity; physical, mental, social and restful; alone and with others; or challenging and relaxing.
- The time use perspective: sufficient time for each; time for all; time over the day, week, month.

Interestingly, whilst this analysis identified a personal and possibly a temporal component, if the time use perspective was used, nothing was mentioned about the environment's role in shaping occupational balance. The physical environment might shape the balance by not being conducive to a certain occupational pattern, but also a possibly bigger role could be taken by the sociocultural environment, in terms of, for example: rules for engaging in occupation for social acceptance; people to engage in occupations with; resources with which to engage in occupations. It is perhaps surprising that a concept analysis of 43 articles did not draw out any of these issues at all.

It is not surprising that the idea of having the 'right mix' was prevalent enough to be included in the Wagman, Håkansson and Björklund (2012) definition, as earlier research was mainly in relation to time use across varying occupational categories, dependant on the definition of occupation the researcher preferred, or the model of practice being used. However, the right mix, even subjectively assessed, as part of the definition of occupational balance underscores the criticism of Pentland and McColl (2008) that balance is an 'either/or' concept, which involves a person in striving for an elusive life situation and then striving to keep it once obtained.

Eklund, Erlandsson and Leufstadius (2010) conducted research into time use among people with persistent mental health conditions, specifically exploring occupational balance. In this research the temporal aspects of balance were:

- the *temporal occupational pattern* (how time use was distributed across different kinds of occupation – in this case: self-care and maintenance, work/education, play/leisure, rest/relaxation and sleep)
- and its *daily rhythm* (the pace and distribution of different occupations across the 24hr period). The daily rhythm considers the circadian rhythms of the light-darkness cycle and the activity-rest cycle, which brings to the fore some of the rhythms which Meyer (1922) suggested should be part of what helps a person achieve balance and harmony.

Their research found that the extent to which an occupational pattern and its daily rhythm are synchronised with the light-darkness cycle is important to function and health, which is support for Wilcock's theories around the need to return to more natural rhythms (see earlier discussion).

The two personally experienced aspects of occupational balance in this research by Eklund, Erlandsson and Leufstadius (2010) were:

- *satisfaction* with engagement, or absence of engagement, in different daily occupations;
- *occupational value* which is the value a person perceives when engaged in an occupation in relation to one or more of the following three dimensions:
  - Concrete value – relates to the tangible aspects of an occupation, for example a satisfying end-product or learning something new.
  - Symbolic value - relates to what an occupation signifies for a person in terms of identity and belonging.
  - Self-reward value - relates to the immediate inherent rewards of doing, such as joy and pleasure.

This research covered all the expected areas related to occupational balance –

- temporality – an occupational pattern of *doing* over time,
- personal meaning – related to *being* in the moment (self-reward), and *becoming* (learning and achievement aspects of concrete value and identity aspect of symbolic value),
- and sociocultural environmental impacts were considered within the symbolic value dimension, which closely links to occupations that support *belonging* and to sociocultural events (Eklund, Erlandsson and Leufstadius, 2010).

It can, therefore, be inferred that this research also supports Wilcock's (2007) idea's regarding what occupation is, (D+B<sup>3</sup>), in its full complexity and that adding the temporal components suggests that this research is getting to the nub of the issue of occupational balance.

Håkansson, Dahlin-Ivanoff and Sonn (2006) found, in their research with women recovering from stress related disorders, that what level of balance a participant achieved was dependent upon a dynamic interplay between four components (see figure 3) which emerged as themes in the study. These four components could also each be seen as a continuum between a positive and negative aspect.



Figure 3: Dynamic interaction for balance or overload in daily life (Håkansson, Dahlin-Ivanoff and Sonn, 2006, p. 77)

Manageability and control were considered prerequisites for achieving a harmonious occupational repertoire, which could influence how personally meaningful occupation related to balance in everyday life (Håkansson, Dahlin-Ivanoff and Sonn, 2006). The sociocultural environment was shown to exert pressure on the women within the occupational self-image theme, where participants tended to work for others and their needs when experiencing overload rather than for their own values or needs (Håkansson, Dahlin-Ivanoff and Sonn, 2006). Personal meaning and values were certainly a major part of this presentation of occupational balance, although the temporal element was not directly considered.

Regarding the temporal component, Meyer (1922) understood the importance of the relationship between time and occupation along with the rhythm and harmony of their connection. As mentioned previously not all of Meyer's values have been integrated into occupational therapy's understanding of occupational balance and the focus has been very much on the categories of occupation rather than the more naturally harmonious elements he valued. Pemberton and Cox (2014) call for a return to 'his emphasis on the process of harmony and interplay between temporal and occupational factors incorporating rhythm.' (p. 3). Meyer (1922) described rhythm as recurring cycles such as sleep and hunger, which Pemberton and Cox (2014) argue can now be integrated with what is known about physiological cycles within the human body such as circadian rhythms. Farnworth (2004) posits that tempo encapsulates these biological rhythms and the flow of energy and time in relation to our environment, suggesting that this aligns Meyer's (1922) original vision with the later developed divisions of time use, tempo and temporality.

Pemberton and Cox (2014) consider that occupational balance relates to time use (what people do with their time and why) and to tempo, 'through the patterns created in how individual occupations are interwoven and their impact on biological rhythms' (p. 5). They do not, however, seem to believe that occupational balance relates to temporality, which is defined as a subjective perception of the past, present and future, a person's sense of self within time (Pemberton and Cox, 2014). Other authors consider that the personal experience of engagement is directly related to temporality (Hammell, 2009a; Wilcock, 2007; Pierce, 2001b) ensuring continuity of occupations and occupational balance viewed across a life-line, as is what provides some of the meaning for occupational engagement and occupational balance (Eklund, Leufstadius and Bejerholm, 2009).

Sheldon (2009, p. 63) proposes that approaching balance from the perspective of optimal time use provides the most solid foundation and may enable issues of the 'no new information' and the 'circularity' problems to be overcome. Sheldon (2009, p. 63) explains the 'no new information problem' occurs when the expected/hoped for outcome of balance is included within the actual definition. He provides an example of this type of definition from Stamm *et al.*, (2009):

*Occupational balance means to be engaged in different types of occupation in a dynamic way so that this individual mix of occupations leads to health and to high quality of life as experienced by the individual. (p. 63)*

Sheldon (2009) submits that this inclusion means it is not easy to conceptualise balance as distinct from the health and the high quality of life it will hopefully bring about. He asks the question is 'balance just a synonym' (p. 63) for the positive expected outcome, in this case, for health or for positive quality of life? He also suggests that defining balance by its outcomes causes another conceptual difficulty: 'How do you know a person is balanced? Because they are healthy. How do you know a person is healthy? Because they are balanced.' (Sheldon, 2009, p. 63) This is what he terms 'the circularity problem', and points out that some definitions even define balance as balance, such as Jonsson, Borell and Sadlo (2000):

*One of the classic concepts of occupational therapy is occupational balance which traditionally has been defined as a balance between work, play, rest and sleep in human life (p. 29).*

To avoid these confusions, Sheldon (2009) advocates a time use approach although he is aware that this approach does not easily include meaning, which could make it too simplistic to capture all the components of occupational balance. His proposed definition of life balance is:

*first, that balance represents an equitable distribution of time across one's actual time-use profile, and second, that this distribution is also non-discrepant from one's ideal time-use profile.* (Sheldon, 2009, p. 66)

This is known as a discrepancy based model, as the measure of balance looks at where real engagement differs from the person's ideal engagement. In his research studies Sheldon (2009) reports that non-discrepant time use (i.e. where the ideal was close or the same as the actual time use) was associated with life satisfaction. He concludes that life balance (as synonymous with occupational balance based upon the definition) is a real psychological construct, but as mentioned previously this is based purely on a time use method of research, not looking at the meaning of the engagement to the participant.

Another study taking a discrepancy approach is Wilcock *et al.* (1997), which was one of the first to reject the 'arbitrary dividing of occupation [into categories which are] culturally defined, with no clear physiological boundaries' (p. 21). It considered occupational balance under the categories of physical, mental, social and rest occupations. Participants in the research were asked to rate firstly their current and then their ideal balance across this categorisation of occupation. They were also asked to rate their health. It was noted that those with the greatest difference between the current and ideal balance scores rated their health as poorer than those with less difference between current and ideal balance. Those with identical or close current and ideal balance scores rated their health as excellent. Wilcock *et al.* (1997) also noted that the oldest age group in the study aged between 65 and 85 years of age reported the least difference between their current and ideal balance and the highest health scores. The authors do not directly define the term occupational balance in their study, but the research suggests that it is a discrepancy based definition. They state that their study 'reveals some important insights into the relationship between one concept of occupational balance and health which merits further investigation' (Wilcock *et al.*, 1997, p. 27) intimating that they do not consider this the only view to be taken of balance, and perhaps are acknowledging that some of the personal experience and meaning qualities are missing.

Eakman (2014) has a similar discrepancy based definition to Sheldon (2009); however, he has replaced equitable time distribution with meaning in terms of how the balance is to be demonstrated:

*a person reporting high levels of meaningful occupation concurrently with low need for additional meaningful occupational experiences* (p.3).

He recognises that the literature around balance is confused regarding definition and whether life balance and occupational balance are synonymous terms, but there is a consensus regarding the

need for subjective experience to be assessed in relation to a person's time use and he uses life satisfaction, meaning in life and basic psychological needs fulfilment (autonomy, competence and relatedness) to represent well-being in his research. Meaning in occupation in this context is defined as having the following qualities:

- Competence and goal achievement
- Pleasure and enjoyment
- Social connectedness

In an earlier article, Eakman (2013) reported on a preliminary study which found that 'lower perceived need of more meaningful occupation together with greater levels of meaningful occupations explained wellbeing' (p. 12). Eakman (2014) undertook some secondary analysis of the data from this study to test the hypothesis that 'persons experiencing *Life Balance* in day to day activities will demonstrate significantly greater levels of well-being (and lower-levels of ill-being) compared to persons identified as experiencing *Life Imbalance*.' (p. 9) This hypothesis was confirmed by his research, however, as he acknowledges, there is no time use assessment considered directly within his research method – nor accounted for within his definition of balance. He suggests that his research approach should 'be paired with an objective assessment of time use (e.g., hours spent across common categories of occupation) as a complementary approach' (Eakman, 2014, p. 14), but does not explain how this would assist in either supporting his definition of balance or testing its relationship to well-being.

One study which used an objective assessment of time use across life domains alongside a subjective assessment was by Sheldon, Cummins and Kamble (2010). Findings demonstrated that both measures of balance were associated with subjective well-being, 'concurrently, longitudinally and cross-culturally' (p. 1094). Importantly the associations between balance and well-being were independent of participant's time use in life domains. The authors regard this as support for the 'claim that life balance is an emergent property of people's lifestyles as a whole' (p. 1094), which is in line with my consideration of occupational balance as a construct which consists of a panoramic view of a person's engagement, rather than a focus on particular aspects.

It is clear to see that occupational balance and its impact, in terms of health and well-being are being researched, but there is not a consensus on how the term is defined or how it should be researched. The discrepancy model is prevalent in research which is looking for a quantitative way of viewing the concept across larger populations, but even those of a more qualitative nature have, until recently, imposed categories upon the concept and therefore upon the participants in their research (Forhan and Backman, 2010; Erlandsson and Håkansson, 2009; Buse, 2009; Erlandsson and Eklund, 2006). There are some exceptions, such as the work by Jonsson (2008) discussed in the section about defining occupation, (also see Dur *et al.*, 2014; Stamm, *et al.* 2009;



Hammell, 2004b), but many authors seem committed to the idea that the occupational pattern will consist of occupations categorised by variations of the themes work, leisure and self-care, that is seems natural to use these, even if the data has to be forced to fit (Hammell, 2009a); and without considering the cultural issues that could arise.

More research is required into what happens when researchers do not adopt the usual categories but allow participants to explain what they *do* without boundaries, allowing any themes or categories to emerge from the data. Wagman, Håkansson and Jonsson's (2014) scoping review supports this as they suggest it would be relevant to study occupational balance where 'work, family and leisure are not distinct categories' (p. 7). Their review also suggests that a broader research base is necessary, as the current knowledge base is predominately from a Swedish perspective; and asserts that there is a specific need for research encompassing older people, as research is currently sparse in this area (Wagman, Håkansson and Jonsson, 2014).

Whilst balance may have an element to it relating to the quantity of involvement across occupations, it could not be totally understood by looking at time allocation across categories of occupations or ratio of involvement in occupations alone (Wada, Backman and Forwell, 2010). It is also necessary to consider the extent to which a person's values and goals are reflected in the occupations in which they engage (see Pentland and McColl, 2008; Håkansson, Dahlin-Ivanoff and Sonn, 2006).

The congruence between the occupations and a person's roles and goals dictates the level of meaningfulness perceived by the person in relation to their occupations. Engagement in personally meaningful occupation 'appears to be a mechanism that enables people to achieve balance in everyday life.' (Håkansson, Dahlin-Ivanoff and Sonn, 2006, p. 81). Wada, Backman and Forwell (2010) also acknowledge that people arrange occupations based upon the congruency between occupations and individual values, but that time demands (the temporal element) is also a factor. This is where definitions of balance which include the idea of some occupations being obligatory, and discretionary (Backman, 2004) are particularly pertinent as a measure, as it is proposed that where time demands are high, obligatory occupations will be performed to the detriment of discretionary activities. If this continued indefinitely a person would be in a situation of imbalance possibly leading to negative influences on health and well-being (Wilcock and Hocking, 2015).

Considering, then, the importance of engagement in meaningful and discretionary occupations, Leufstadius, Eklund and Erlandsson (2009) found that being engaged in such meaningful occupations (in their research it was engagement in work type activities) created a positive extension in terms of more participation in other aspects of everyday life, more engagement in

occupation (see also Eklund, Erlandsson and Leufstadius, 2010). Rebeiro and Cook (1999) identified a similar process, which they termed 'occupational spin-off', in a study of women in a women's mental health group. The engagement in successful, fulfilling and socially praised occupation led to more engagement in occupation, as the women felt better and wanted to continue to feel better. Participation was impacting their sense of well-being positively leading to more participation. This does suggest that having one or more occupations in a person's life which have positive and fulfilling qualities will lead to an overall positive assessment of their occupational engagement and balance (Farnwoth, 2004), and that people would want to continue to engage in occupations which had these positive associations across their life span if possible.

This ties in with the Jonsson (2008) work looking at an experiential way of categorising occupation described above where he discusses *engaging occupations* and/or *social occupations* as central to an individual's temporal pattern for occupational balance. He suggests that where there are not fulfilling and challenging experiences, then as a substitute a person looks for time killing occupations. Occupational patterns for those with engaging and/or social occupations were *full* as well as fulfilling, where as those with a pattern including time killing occupations had noticeably fewer occupations engaged in overall. It was also noted that 'presence of engaging occupation was closely connected to a description of a good life as a retiree' (Jonsson, 2008, p. 5). Enjoyable and meaningful occupations are important to people as they age and appear to impact positively upon post retirement experience possibly due to 'occupational spin-off'. Enjoyable and fulfilling occupations in a person's 'occupational repertoire' (Håkansson, Dahlin-Ivanoff and Sonn, 2006, p. 78) seem to give an overall sense of well-being when they shape that person's occupational pattern.

Wilcock suggests that a dynamic balance between doing and being is central to healthy living and the becoming dimension is dependent upon both (Wilcock, 1999b). The pervasiveness of the Wilcock theory,  $D+B^3$ , throughout the definitions and research around occupational balance, either explicitly or not, suggests that to provide a full definition of occupational balance requires the inclusion of the doing, being, becoming and belonging dimensions. As this discussion has demonstrated, the elements of action in time, along with what that means are both central to occupational balance. Continuity of occupations and a sense of belonging within a sociocultural environment are also elements to be considered within balance, along with the aspirational aspects of engagement.

As there is not one, agreed upon, definition of occupational balance in the academic literature, my propositional definition of occupational balance for the purposes of this research project, is:

**Occupational balance** is the panoramic view of a person's engagement in occupations at a current point in time, encompassing the actual occupations engaged in viewed as a pattern across time; the meanings and values associated with them by the individual; how these enable the individual to plan and achieve aspirations; feel a sense of sociocultural acceptance; and have continuity in their lives.

Having reviewed literature relating to the definitions and categories associated with occupation, considering influential theorists and research, it became clear that this was a complex and ill-defined concept. The categories or domains of occupation in current and regular use within the profession and occupational science are not based in empirical research and are now being challenged within the profession's own literature base. For the purposes of my research, the Pierce (2001a) experiential definition of occupation, alongside Wilcock's (2007) macro definition of the dimensions of occupation – doing, being, becoming and belonging – are most congruent.

Moving on to occupational balance, it was demonstrated that this too was an ill-defined concept but that recent moves and increases in research output had led to some clearer ideas of the key components that should be involved. I have ended this section with a definition of occupational balance which is drawn from the literature reviewed and is also congruent with my research epistemology and the constructivist grounded theory approach taken.

### Implications for Older People

Moving on to consider the implications for older people in the UK, it is first important to consider what their occupational engagement might look like and what factors impinge on this. At retirement and beyond older people's participation in some areas of occupation can be curtailed, mainly in relation to productivity (Walker, 2015; Thompson, Itzin and Abendstern, 1990; Gilbert, 1988). According to disengagement theory, a reduction in these productive occupations within old age is to be expected, as it is a time of disengagement from society and a winding down towards death. Cumming and Henry's (1961) theory, one of the most controversial in gerontology, claims that in a process which is 'universal, inevitable and mutually accommodating for the individual and society' (Nimrod and Adoni, 2006, p. 610) the older person withdraws from society. This theory is challenged by many sources and could be viewed underpinning the prejudice and social exclusion from which older people suffer (Bonder, 2018; Walker, 2015; Bowling, 2008; Bond, Coleman and Peace, 1993; Thompson, Itzin and Abendstern, 1990).

Disengagement theory is also at variance with many occupational therapy theorists' views, including my own. Adams (1990) cited in Mandel *et al.* (1999, p. 12) suggests that "the sense of uselessness is the severest shock which the human system can sustain and that if persistently sustained it results in atrophy of function". Mandel *et al.* (1999) note that older people are in the process of living, and their life narratives still have a sense of forward progression. An

interviewee in a Canadian study succinctly rebuts the expectation of reduction in occupational needs

*"...they would like all citizens to be "brain dead" after they retire, to shut their mouths and become little children who need their noses wiped...I want the right to be as active as I choose to be, and I want all the leisure and entertainment pursuits that any young man desires" (Fry, 2000, p. 376).*

Havighurst and Albrecht (1953 cited in Walker, 2002) developed Activity Theory as a reaction against Disengagement Theory and suggested that maintaining social roles and activities that were meaningful and associated with middle age would enhance feelings of wellbeing in older age. The issue with this is that it made generalisations about the ageing process and did not acknowledge the possible physical, social and economic barriers to older people's engagement (Walker, 2012; Bowling, 2008). The link between activity and well-being is, however, clear and supported by empirical data (see Depp, Harmell and Vahia, 2011; Pressman *et al.*, 2009; Gottlieb and Gillespie, 2008; Hammond, 2004). It is suggested that continued activity in older age can 'compress morbidity' (Grundy and Bowling, 1999), so ensuring that the 'Fourth Age' remains a short time-span in people's lives even as life spans increase, however there is growing concern that if the general population does not embrace some of the messages on how to maintain health going into older age, then there may be an increase in years spent with mild or more severe activity limitations, in many countries (Bowling 2011). Following on from Activity Theory, Atchley (1989) advocated Continuity Theory, which proposes that older people adapt to ageing and the normal changes associated with this by a strategy enabling them to maintain internal psychological continuity, along with continuity in their social behaviour and external circumstances. Atchley considered that continuity theory had 'enormous potential as a general theory of adaptation to individual aging' (1989, p. 183), and suggested that Activity theory (Havighurst and Albrecht, 1953 cited in Atchley, 1989) only part-way explained older people's behaviour as it was an 'equilibrium model' where action would return the situation back to its previous state. This did not take account of the differences and deteriorations that might occur as a person aged meaning it was not possible to maintain that equilibrium.

Continuity as the main adaptive coping strategy employed when dealing with changes associated with ageing (Nimrod and Rotem, 2011), allows for more flexibility and letting go of occupations and activities which are no longer supportive of health and well-being. Continuity theory assumes 'evolution not homeostasis' (Atchley, 1989, p. 83), and is a way to describe how older people structure choices and plan their future using concepts from their past to respond to changes due to normal aging. Atchley (1989) does acknowledge that normal aging will look very different depending on the culture in which it takes place but also states that continuity theory has limits in relation to describing the process of aging for older people who are experiencing 'pathological

aging' (p. 184). This term is used to mean those who cannot meet their own needs due to disability, socioeconomic situation or cognitive deficit (e.g. dementia).

Continuity Theory, which seems to be ignored in more recent literature discussing theories of ageing (Foster and Walker, 2015; Walker, 2012; Grundy and Bowling, 2004), with its explanation of the adaptive process an older person would go through in relation to normal ageing is similar to the occupational adaptation theory (Schkade and Schultz, 1992) which explains a normative process of an adaptive mechanism that people use to enable them to continue to engage in desired occupations when circumstances challenge their capability to do so. People with disabilities can need therapeutic intervention to enable them to strengthen their adaptive mechanism and use this to work with their disability to maintain their occupational engagement in valued activity (Schkade and McClung, 2001). This suggests that Continuity Theory could be more applicable to those who are ageing 'pathologically' (Atchley, 1989) if ways to improve adaptation skills are considered, perhaps making this an interesting theory for occupational therapists wanting to move into health promotion with older people. It could offer a theory providing shared understanding of the ageing process, and how occupational therapy could intervene, with other professionals.

Walker (2015) submits that the general approach prevalent in the later activity related theories was to suggest achievement of effective ageing by 'denying the onset of old age and by replacing those relationships, activities and roles of middle age that are lost, with new ones in order to maintain life satisfaction and well-being' (p. 2). Both Activity Theory and Continuity Theory suggest a denial of ageing and a manifestation of the bipolar ageism in our society. Older people *either* feel they cannot be seen to reduce their level of activity as they would be viewed frail and/or unproductive, *or* can't be seen to be ageing normally due to the 'discontinuities' manifest in their lives if they are ill or disabled. Both these and 'Successful Ageing', a model used predominantly in the USA, which developed out of the activity perspective do not acknowledge that old age is not often reached without ill health or disability (Foster and Walker, 2015).

Successful ageing, with its focus on medical/ health related measures of success, where life engagement (social participation) is at the bottom of the hierarchy of success, has a very narrow view of ageing. It is suggested that the losers in this, i.e. those who are not 'successful agers' are those with disabilities, illness or frailty (Foster and Walker, 2015). This is indicative of prevailing discrimination and what Foster and Walker (2015, p. 85) suggest could become 'a professional dogma with no room for human agency' as there is no indication that older people have been included in the discussion on how they view successful ageing or how it should be measured. What these theories do not acknowledge, along with the likelihood of illness or disability as people age, is that people who are experiencing illness or disability may still feel that they are

aging well; able to engage in life; and the activities that they enjoy (Hayward and Taylor, 2011; Bowling and Dieppe, 2005; Hyde *et al.*, 2003) by adapting to ensure continuity of their engagement.

The World Health Organization (WHO) have promoted the alternative idea 'Active Ageing' as a global policy, with the definition:

*Active ageing is the process of optimizing opportunities for health, participation and security in order to enhance quality of life as people age. It applies to both individuals and population groups. ...It allows people to realize their potential for physical, social and mental well-being throughout the life course and to participate in society according to their needs, desires and capacities, while providing them with adequate protection, security and care when they require assistance. The word "active" refers to continuing participation in social, economic, cultural, spiritual and civic affairs, not just the ability to be physically active or to participate in the labour force.'* (2002, p. 12)

Walker (2015) suggests that there is a lack of clarity around exactly what active ageing means in practice, and how it can be measured which is preventing its full implementation across countries. Across Europe there is a dichotomy regarding the approach taken, between a 'productivist' view relating it to keeping older workers in work for longer by raising retirement ages; limiting early retirement schemes; and more clearly demonstrating the links between contribution and output of pensions as an incentive to work longer – compared with a more comprehensive approach (Foster and Walker, 2015) along the lines suggested by WHO (2002). Walker (2015) suggests that taking a comprehensive view of active ageing is inclusive of those in both the third and fourth ages of life, and allows for older people to look forward and have control over their ageing process, without feeling stigmatised and undervalued by society. He strongly advocates an active ageing policy which fulfils seven key policy principles:

- Activity should include all meaningful pursuits that contribute to a person's well-being, not just paid employment or physical activity.
- It should be a preventative concept, developed across the life course, so individuals at all stages of life are encouraged to live well, with the promotion of preventative health intervention around lifestyle
- It should encompass all older people – both those in the third and fourth age. A focus on work patterns is likely to exclude the oldest old or those in the fourth age of their life of any age
- Intergenerational solidarity should be a key feature – so fairness between generations
- Should include rights and obligations – rights to opportunities for lifelong education, to social protection and social care, should also come with obligation to take advantage of opportunities and remain active in meaningful pursuits
- Should be empowering, not coercive, with top-down policy and financial investment to facilitate activity but with the opportunity for individuals to make choices and exert right to personal freedom as much as possible within their personal circumstance.
- Should respect national and cultural diversity. (Walker, 2015; 2002)

This concept of active ageing does mesh with an occupational perspective of what supports health and well-being, in terms of engagement in a range of occupations. It is a more inclusive concept than the others discussed and suggests that occupational balance could be a health promotion tool. Enabling people to consider their occupations, in their entirety, and how these contribute to their physical, social and mental well-being and are in keeping with their needs, desires and capacities (see WHO, 2002, definition of active ageing above) could ensure that the active ageing process is within their control and an empowering process. WHO (2015) also promote the concept of healthy ageing which they define as 'being able to do the things we value for as long as possible' (p. 1). This simple definition, from an infographic, clearly demonstrates how the lines between health and doing are blurred, with WHO moving on from recognising health as resource for everyday life (WHO, 1986), to now acknowledging that, in older age, it is inextricably linked to doing.

It is clear to see that the UK has, at least in part, taken the productivist focus of active ageing that other EU countries have exhibited and seen active ageing as synonymous with working longer and retiring later. The Care Act (2014), however, does include legislation designed to encourage services to take a preventative approach and consider people's well-being as the centre of their intervention. Local authorities have a duty to 'provide, or arrange, services that...delay people deteriorating such that they would need ongoing care and support' (DOH, 2016, p. 1).

The UK retirement age is set to rise to 66 by 2020, and to 67 by 2028 (Age UK, 2016), the retirement age will then be continually reviewed to ensure that life expectancy and changes in society are considered and that the State Pension remains 'sustainable for generations to come' (Department of Work and Pensions and Altmann, 2016, p. 1), this suggests that the state pension age could rise further after 2028. The change in state pension age could become a factor in reducing age discrimination, as older people increasingly continue to work past the traditional pension age, demonstrating the benefit of their knowledge and skills to the employer and their community. It could also increase the divide between those able to engage and those who are frailer, and either in the Fourth Age, or just not able to continue in the type of occupational role they had previously enjoyed. Positively for some, the rise in the pension age puts off the transition into retirement, where an individual's choice and control can be threatened. It can allow a person retiring to do so gradually, if desired and financially viable, enabling them to rebalance progressively.

Psychologically at retirement and beyond, older people may experience reduced self-esteem due to reduced ability to participate in previous occupations, compounded by the attitudes of the culture they live in about their value and contribution to society (MHF, 2013; McHugh, 2003). Most older people do not fit the 'burden' profile under which they are frequently mislabelled

(Bonder, 2012). Shreeve (2000) further submits that rather than being a burden, older people have the 'potential to be the glue, the social capital, that binds and rebuilds our communities for all our futures' (p. 1) and so the reduced self-esteem may be more linked to perceptions of others.

Self-esteem considered as two equal elements – value and competence, where competence is defined as the ability to deal with the challenges of living and to have mastery of desired activities (Grantham, 2000). This is close to the AOTA (2002) definition of independence as "a self-directed state of being characterized by an individual's ability to participate in necessary and preferred occupations in a satisfying manner" (p. 660). Grantham (2000) suggests that a reduction in ability to perform can lead to a decrease in self-esteem. Nilsson, Lundgren and Lilequist (2012) noted from research, with people aged 90 years or over, that very old people took up the occupation of 'story telling'. By telling stories about how active they had been they were contextualising their current situation within their previous more active history. Perhaps they were hoping to avoid stereotyping as old and inactive, but they were also providing continuity of meaning for themselves – 'their life history was the foundation for what their occupational engagement and well-being looked like today' (p. 123). Continuity through story telling provided them with self-esteem where possibly their current abilities might not – a new occupation had been found to redress the balance for them (Nilsson, Lundgren and Lilequist, 2012).

Tatzer, van Nes and Jonsson (2012) found in their qualitative study with four older women that 'occupation is like a litmus test of one's identity and capacities' (p. 145) and that the women actively tested that they were still 'capable' through occupations – especially those related to their identities. There was also, perhaps, the desire to show others that they could meet the social norms, as well as demonstrating to themselves that they could still engage and have mastery despite growing older. Occupational balance is linked to self-esteem and feelings of competence, and through this linked to well-being, as these are some aspects which are integral to well-being if viewed from an eudaimonic perspective (Robinson, Kennedy and Harmon, 2012). In both the above research projects with 'very' old participants, occupation is being used to support their sense of identity and well-being as they age.

Hammell (2008) notes that occupations influence people's health and well-being whether self-chosen or those they have been 'compelled to engage' in (p. 62). She suggests that if people are not supported to engage in occupation which contributes to their well-being their rights are not being respected. She defines their 'occupational rights' as 'the right of all people to engage in meaningful occupations that contribute positively to their own well-being and the well-being of their communities' (Hammell, 2008, p.62). Respecting those rights in older adults in western societies seems to pose something of a problem, from the point of retirement forwards. In the UK, only 10% of those over 65 are 'economically active' (ONS, 2013) i.e. in work. Within western



societies there is a strong emphasis on economic contribution to the community, and the importance of this to maintaining a person's identity within that, which therefore marginalises older people (Foster and Walker, 2015; Townsend, 1997).

A consideration of the wider picture when it comes to occupation, looking at the pattern of a person's engagement, not individual occupations is important for humanistic and holistic occupational therapy, and from a research perspective for understanding if and how a person's occupational rights are being met and a sense of well-being achieved. Considering the social worth as well as the economic worth of productive activities in more inclusive of older people.

The two schools of thought on well-being – hedonic and eudaimonic<sup>4</sup> are not mutually exclusive and for occupational therapy as a profession with health and/or well-being as an outcome of intervention, well-being is considered as a holistic concept which incorporates elements of both traditions of well-being, and considers the physicality of the person. Wilcock and Hocking (2015) suggest that physical, mental and social well-being are 'interdependent and cannot exist alone' (p. 15), acknowledging the holistic nature of humans and the humanistic basis for the profession.

Eudaimonia is aligned with humanistic psychology and incorporates psychological needs based theories, two of which are particularly pertinent to occupational therapy and this study. Firstly, Maslow's hierarchy of needs (Maslow and Lowry, 1999), which underpins occupational therapy client centred practice. The theory suggests that basic survival needs for food, shelter, warmth and safety, need to be met before a person can be motivated towards meeting needs further up the hierarchy. It links physical, mental and social needs in a consideration of a person holistically. It is used to underpin the ideas of treating service users with respect, and through the therapeutic use of self, to engender rapport, and motivation to engage in rehabilitation. The need at the top end of the hierarchy, self-actualisation is seen by Maslow as being about 'becoming fully human, everything that the person can become' (Maslow and Lowry, 1999, p. 169). Wilcock and Hocking (2015) suggest that becoming through occupation can never be absolute; is a means of striving towards complete well-being; and is strongly associable with the meaning of self-actualisation in Maslow's hierarchy.

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<sup>4</sup> Despite coming from different theoretical bases, the two forms of well-being are complementary to each other (Huta and Ryan, 2010; Waterman, Schwartz and Conti, 2008; Waterman, 1993). The hedonic tradition focusses on happiness, and is defined as the presence of positive affect and the absence of negative affect (Deci and Ryan 2008). The concept of Subjective Well-being (SWB) is linked to this approach, defined as a person's subjective evaluation of positive versus negative affect and degree of satisfaction with life (Huta and Ryan, 2010). The inclusion of degree of satisfaction with life moves SWB from being purely hedonic as this requires a cognitive evaluative process (Deci and Ryan, 2008). The eudaimonic tradition is 'concerned with living well or actualizing one's human potentials' (Deci and Ryan, 2008, p.1). How close is a person's life is to an ideal of their values and moral basis, how true to themselves, and it has also been termed personal expressiveness (Waterman, 1993). Eudaimonic activities are suggested to have certain properties for an individual which are similar to experiences of flow (Csikszentmihalyi, 2002) and 'engaging occupation' as described by Jonsson (2008).

Self-determination Theory (SDT) is another needs-based theory which focusses towards psychological needs. It considers that there are evolved *experiential* requirements that ALL people must meet to grow to their full potential (Sheldon and Niemiec, 2006), so linking doing and being to becoming. SDT suggests that there are three basic psychological needs – autonomy, relatedness and competence (Ryan, 1995), which are the basis for people’s self-motivation to engage (Ryan and Deci, 2000), and when met give a sense of well-being. This is considered a universal concept, not bound by culture. The way that it is experienced and how these needs are met will differ within different cultures. In some more collectivist cultures, relatedness will perhaps be the most important of these needs, however autonomy is not purely about individualist ideas of doing things independently, it is more about choice and control, and will still retain some resonance within cultures where co-dependency is the norm.

Sheldon and Niemiec (2006) suggest that imbalance among satisfaction of the psychological needs is caused by inappropriate allocation of a person’s resources (including time) across different life domains, causing conflicts that will ultimately impact on well-being negatively. Meyer (1922) states that there is a natural rhythm to a person’s life, which should be in harmony with the environment in which that life is lived. He promoted that there is a time for looking after yourself, a time for doing things with and for other people, a time for challenging yourself and a time for relaxation, reflection and restoration (Christiansen, 1999; Meyer, 1922), allocating time effectively in this way leading to the needs for relatedness, autonomy and competence being met (Ryan and Deci, 2001). How this looks for each individual is different, depending on their internal capacities and the contexts – cultural, social, physical – within which their doing takes place (Wilcock and Hocking, 2015). Considering occupational balance to be more about how people construct a pattern of doing to meet their needs for meaning, acceptance, challenge and continuity over time, suggests universality of this concept.

## Conclusion

Within this chapter, I have considered the occupational therapy foundations to my study. This involved an exploration of how occupation has been viewed from within the profession; and how these perspectives have been used to form professional viewpoints regarding the related concept of occupational balance. Links between occupation, health and well-being are the foundation of the occupational therapy profession, predicated on a belief that occupation is a universal requirement for people from any culture, and that it can have good or bad effects on health and well-being depending on the situation (Wilcock and Hocking 2015). However, there is not a definitive definition of occupation agreed on within the profession globally or indeed nationally. Although the theoretical landscape could be considered somewhat rocky, the Pierce (2001a) definition of experiential occupation, married with the complementary characterisation of

occupation as being comprised of four dimensions: doing, being, belonging and becoming (Wilcock, 2007) have proven to be a good fit in relation to the aims of my study and my ontology.

The idea that occupational balance is also universal was considered and a range of ways of viewing this concept, including discrepancy based definitions were discussed. I was also not able to find an agreed upon definition of occupational balance, which was not contrary to a constructivist viewpoint. I, therefore, developed my own, working definition of the term, which is informed by the literature reviewed, alongside a set of pilot study results (Chamberlain, 2007), which gave me an initial perspective and situates my stance on this concept at the outset of the project.

I also expressed my interest in a group within society and explained my perspective upon their situation within the current UK context, and considered this from the viewpoint of several theories around ageing. Having considered this literature, I will move on to the chapter considering the methodology and methods relevant for this study.

## Chapter 3: Methodology and Study Design

This chapter will consider methodology and methods used within this research study. To this end it will include a consideration of constructivist grounded theory; why this was chosen as the theoretical framework for this study, a consideration of underpinning perspectives to the grounded theory framework used; a description and critique of the method used in the study; followed by a discussion of ethical considerations; and practical issues and limitations.

### Methodology

Due to the nature of the investigation, a qualitative approach was chosen. Developing an understanding of a social phenomenon in a natural, non-experimental setting, giving due emphasis to the participants' experiences, and the meanings the participants attribute to it, is the aim of a qualitative approach (Mays and Pope, 1996). This is in keeping with what is required when investigating the occupations a person engages in; as an experience unique to that person. As described by Pierce (2001a), each occupational experience is a one-time, non-repeatable event taking place in specific temporal and cultural contexts; specified physical and social environments; and with specific personal motivation and interpretation. Extrapolating this out, when considering occupational balance as the pattern and meaning of the occupations which engage a person across their daily lives, it becomes clear that the person's own evaluation of the experience, alongside the meanings engendered by their participation is important if a clearer picture of what constitutes occupational balance and how it impacts on the person is to be evaluated.

This research project was designed within a constructivist approach, which suggests that there is no one truth or one social reality but that knowledge and reality are a mutual creation of the researcher and the researched. The aim of this type of approach is an interpretive understanding of the social realities constructed and inhabited by a social being (Charmaz, 2003). Constructivist thinking has a relativist ontology which suggests there are multiple realities linked to a subjectivist epistemology which acknowledges that the researcher and the researched co-create understandings. It lends itself to naturalistic methodological procedures with findings often presented in terms of grounded theory or pattern theories (Denzin and Lincoln, 2003).

When reflecting on the questions I wanted to ask of my data and what I wanted to achieve from this exploration, a grounded theory approach seemed appealing. However, after reading Strauss and Corbin (1990) from cover to cover when engaging in a smaller study, I began to feel

that the structure was too restricting. There was a very rigid, proceduralised and prescriptive approach to working with the data, which has been termed 'Straussian' grounded theory (Kenny and Fourie, 2014, p. 4). I felt I would be trying so hard to follow the process that the real purpose, i.e. analysing the data, and exploring the topic area, could become an almost secondary endeavour. Continuing to look at literature about grounded theory, I read an article by Charmaz (2003) explaining a different way to view and use grounded theory. This freer and more fluid approach to working with the data, did not seem like a 'straitjacket', and the epistemology underpinning what Charmaz (2014, p. 13) entitled 'Constructivist Grounded Theory' was much more in keeping with my own relativist understanding in relation to knowledge construction. Charmaz (2014) explains that she chose the term 'constructivist' because at that time (late 80s-early 90s) social constructionist approaches were not taking a relativist view. In other words, they were viewing their analysis as 'accurate renderings' (p. 14) rather than constructions which took account of the process of participants engagement in the research, as well as the accounts they provided; and took account of the researcher's own subjectivity and part in the construction of the analysis. Using the term 'constructivist' differentiated her stance, and positioned her with social constructivists who view social contexts, interaction and interpretive understandings as important. As constructionism has progressed since the early 90s, and relativism is more evident, the differences between this and Charmaz's constructivist approach have blurred (Fleetwood, 2013).

Alongside the relativism of the constructivist approach, the idea of grounded theory which had first drawn me to it, was that of explicitly moving beyond constructing a rich description of social processes and experiences in qualitative research. Focussing data collection towards constructing theory, so an explicit emphasis on developing concepts and constructing theory, is the defining feature of a grounded theory approach to data collection and analysis. Using data in this way and being encouraged towards 'theoretical playfulness' (Charmaz, 2014, p. 137), where I could try out ideas and see where they led me was interesting.

I therefore decided that constructivist grounded theory was a good fit for this research looking at what older people do with their time; what influences this; what meanings these activities hold for them; and what the overall picture for these older people is. It is a research strategy that considers facts and values as inseparable, has an aim of making patterns visible and understandable through close scrutiny of the data, and acknowledges the researcher's role in the construction of the research, from data collection through all stages of analysis to theory development. 'The theory depends on the researchers view; it does not and cannot stand outside of it' (Charmaz, 2014, p. 239), and so my reflexivity was crucial at all stages of the research process. This helped to ensure that I could maintain theoretical sensitivity, meaning conceptual

choices and theorising were clearly rooted in the empirical data. In the next section, there is more detail about the approach, process and application.

### Constructivist Grounded Theory

This approach to grounded theory explicitly states that theoretical renderings offer an interpretive portrayal of the studied world and not an exact picture of it (Charmaz, 2006). What comes out of the data and how it is interpreted by the researcher into finished grounded theory are all constructions of reality. The process used is a more flexible and fluid interpretation of the original grounded theory process first developed by Glaser and Strauss (1967) and further expanded on by Strauss and Corbin (1990), and, as discussed above, is more in keeping with my theoretical viewpoint of social constructivism. From this viewpoint, it can be understood that form and content depend on each other, meaning that a focus on the 'what' and 'how' of a topic is achievable (Silverman, 2001), and that participant responses are 'displays of perspectives and moral forms' (Silverman, 2001), rather than reports on reality.

The Figure 4 below, based on the processes described by Charmaz, (2014; 2006; 2003) and a diagram in Charmaz (2014) offers a representation of the constructivist grounded theory procedure as applied in this project. As can be seen it is a simplified view of the procedure, compared to that described by Strauss and Corbin (1990) and highlights that the main purpose of analysis is to be immersed in the data not to get over-taken by procedural anxieties. This simplified procedure aids interpretation, without being constrained by following set procedures in a mechanistic way. Charmaz advocates using coding schemes like axial coding (Strauss and Corbin, 1990), or theoretical coding (Glaser, 1978) only as this is suggested by the data being analysed. Charmaz (2006) suggests coding in grounded theory usually has two levels i.e. initial coding and focused coding, aided toward theoretical conceptualisation by the writing of detailed and frequent memos at all stages and the use of theoretical sampling as appropriate.

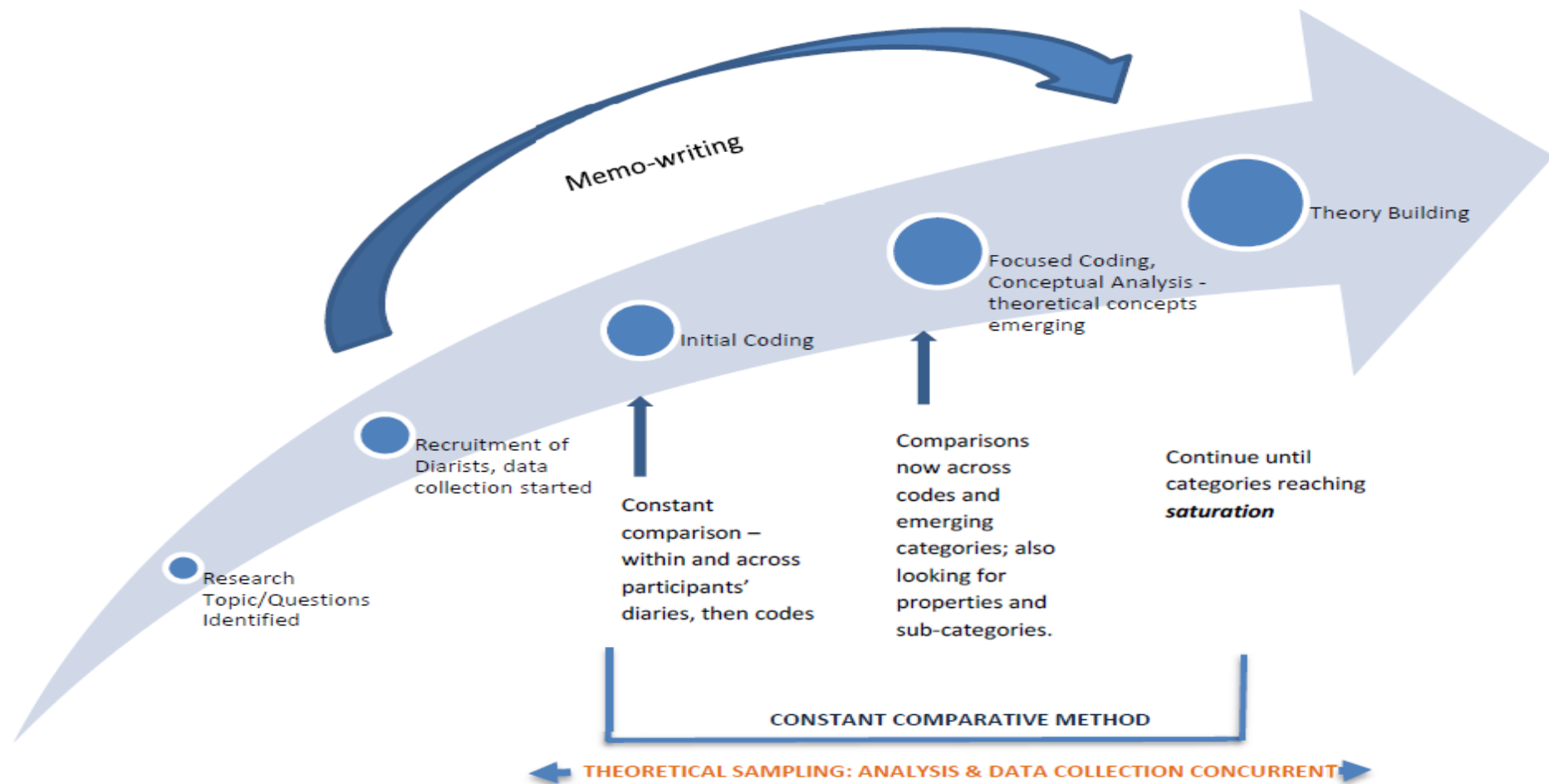


Figure 4: Constructivist Grounded Theory Applied

## Sensitising Concepts

In an abductive strategy, data generation, analysis and theory develop concurrently in a dialectical process (Mason, 2002), which describes the grounded theory process, although it can also be described as inductive. If considered abductive, it does suggest that the researcher's previous knowledge base may be more in emphasis than some authors would suggest (Mason, 2002). The way previous subject specific knowledge is accounted for within grounded theory is through the idea of sensitising concepts. Charmaz (2014) suggests that sensitising concepts are 'points of departure' (p. 31) for developing not limiting ideas. The specific 'novel' concepts are then devised through analysing the data through successive levels. It must be noted, again, however that the theories developed within grounded theory are constructed, and the researcher is part of that construction.

*'The constructivist approach perspective shreds notions of a neutral observer and value-free expert. Not only does that mean that researchers must examine rather than erase how their privileges and preconceptions may shape the analysis, but it also means that their values shape the very facts they can identify' (Charmaz, 2014, p. 13)*

In this approach profession specific presuppositions and concepts normally used to assess people's engagement in occupations must not be allowed to take centre stage and lead to 'automatic codes' (Charmaz, 2014, p. 159) for analysing data. Previous studies into what people do with their time have tended to use coding schemes devised by the researchers prior to data collection and applied to the research study, or to come from models of practice and the outcome measures used with these rather than from the perspective of people participating in studies (see chapter two). I suggest that such pre-set views on categorisation does not give full voice to the social reality of the participants.

In chapter two, I explored the areas of theory which relate to the topic I am researching here, and the prior knowledge and understanding I was therefore bringing into this study. I had completed a pilot study (Chamberlain, 2007), using a diary to look at what older people did with their time and, as explained above, did consider using the coding scheme from that study as a starting point for this study. However, Charmaz (2014) is clear that preconceived ideas should earn their way into the analysis process, including those from previous studies you have conducted. Bearing this in mind, I did not see any good reason to use these previous codes and so started afresh with no pre-set codes and completed a line-by-line analysis. When going into focussed coding, an example of where a previous idea did feel relevant was around social engagement, which could



be categorised within the definition of 'social participation' provided by the AOTA (2014), as a way of differentiating the level of participation, i.e. with family, peers or the community.

In relation to the term 'occupational balance' this was really a shell or an overarching title for the research topic giving the idea that it related to what people do with their time, with no real concurrence within the profession as to what this was explicitly defined as, and what properties it included. It is, however a term instantly recognisable to members of the occupational therapy/science community who will be the main community to access this research, and could 'peak' their interest. To use it as an umbrella term, does not detract from the data provided by the participants or how rigorously my grounded theory process was applied to coding and theory development to 'fill the shell'. It also links to the idea of an abductive research strategy (Blaikie, 2000, p. 25) as discussed above.

## Study Design

### Data Sources, Types and Forms

Following Ethical Approval from my Faculty's Ethics Committee of the research design, and associated paperwork, fourteen older people were recruited to take part in the study. Procedures for protecting participant anonymity and data protection were strictly adhered to.

The inclusion criteria for the study states that participants needed to:

- Have retired from their job/career (this does not mean they cannot be engaging in paid or unpaid work but have retired and are eligible to receive a pension)
- Consider themselves to be independent in their daily life activities

200 invitation letters were distributed to members of the local Older Person's Forum asking for expressions of interest from people who met the above inclusion criteria.

The decision to focus on those older people who had reached pensionable age and still considered themselves to be independent, was to ensure that the participants could be viewed as being in the 'Third Age' (i.e. active older people), as defined by Laslett (1996). In this study, I wanted to examine what older people do with their time, in a way that moves beyond either end of the bipolar spectrum of ageism i.e. seeing older people as either frail and useless or vital and ageless, towards viewing them as real, functioning members of our society. Therefore, asking people to participate in this study with wide participation criteria seemed appropriate. It also made it more likely that there would be enough participants willing to take on the work involved in keeping a detailed reflective diary, including an in-depth sheet for a total of fourteen days. All the initial potential respondents who expressed interest in participating met then inclusion criteria. However, some of those showing initial interest did not want to commit to fourteen days of keeping a diary. The final count was fourteen diarists, but three only kept a diary for the first seven days. As this constituted a large amount of information about their daily occupations, and the format and focus for the diaries did not change between the first set of data collection and the second, it was appropriate to include their diary entries in the study. The rationale for asking the diarists to complete a second set of seven days a few weeks after the first was twofold. Firstly, as this was a grounded theory study, the pause in data collection allowed time for some analysis, so if certain themes or concepts started to emerge, then the second set of data collection could be focussed towards testing out those conceptual beginnings, a process known as theoretical sampling. Secondly, within the grounded theory process of constant comparison, it would give more data for comparison within and across participants' diaries.

## Data Collection Method

### *Introduction*

This section will examine the choice of diaries as the data collection tool used in this study. It will consider the methodological, practical and ethical issues in using this tool, considering previous studies using this or a similar method in comparison with the current study. This is important, given that the choice of tool needs to relate to the methodology, and be effective in getting the necessary data to explore the topic under investigation.

The chosen tool, a reflective diary, is not a well-known data collection tool in qualitative research. This means that clarity of purpose and solid rationale for its use will need to be presented. This will include some discussion of its design and use in the pilot study which was undertaken prior to this study.

Diaries are often discussed in methodological texts from the standpoint of their examination as historical documents (Snowden, 2015; Roberts, 2002; Mason, 2002; Jones, 2000; Gilbert, 1993) which when analysed unintentionally yield information regarding the functioning of the author's mental life (Mason, 2002; Jones, 2000). There is, however, some mention of their use as a primary data collection tool, i.e. researcher-driven dairies (see Ayis *et al.*, 2007; Mort *et al.*, 2005; Harris, Daniels and Briner, 2003; Keleher and Verrinder, 2003; Coxon, 1999; Gijssbers van Wijk, Huisman and Kolk, 1999; Elliott, 1997; Burman, 1995;). Diaries are used in primary research in three ways, firstly as an aide-memoire during interviews, in this instance the diary data is not usually analysed; secondly, they can be used in methodologic studies to examine validity of data collection tools; and thirdly, as an actual source of primary data, either quantitative or qualitative (Bolger, Davis and Rafaeli, 2003; Bytheway and Johnson, 2002; Burman, 1995).

Diaries have been used as a tool for collecting quantitative data for many years, for example as far back as the Attwood Consumer Panel in the 1940s-50s in which housewives recorded their purchases in a weekly diary (Moser and Kalton, 1971). The main strength of diaries in that context is reliance on memory for collecting hard data is avoided (Moser and Kalton, 1971). In qualitative research, the use of diaries is rarer, with the in-depth interview being far more common and popular (Alaszewski, 2006). Some research uses diaries as a mixed-method tool, collecting frequency counts, rating scales and other quantitative data alongside the use of open-ended questions to get more qualitative insights (Silverman, 2001; Mason, 2002), or in other mixed method studies as the interview-diary technique (Wright, Sadlo and Stew, 2007; Meth, 2003; Jones, 2000). Diaries could be considered as a stand-alone method for collecting qualitative data (Milligan, Bingley and Gattrell, 2005), meaning there were three possible data collection choices for this research study - participant observation, in-depth interviews and reflective diaries. Participant observation would be too time consuming and difficult to achieve in a small

time-bound research project with one researcher and, as noted by Pierce (2001a), would not allow for the understanding of the significance of different activities to an individual, leaving interviews or diaries to be considered. The following section reflects on issues when using diaries, in relation to health care practice and health research when compared to the use of in-depth interviews.

### *Health Diaries*

In the field of health and social care, health diaries are a popular tool in clinical practice as a way of collecting contemporaneous information regarding a person's symptoms, at or near the time they are experiencing these, giving health professionals a clearer picture for diagnosis and treatment planning. They are used to examine the day-to-day problems, symptoms and self-care actions taken by people with health problems and are presented usually in one of two formats. Either as a journal, where all the events are recorded on one page per day, or as a ledger, which has different pages for different events (e.g. taking medication; visiting GP) (Richardson, 1994). Health diaries do not tend to be used to look at participants' daily activities in general, rather they focus in on the specific health symptoms and health related behaviours these engender (Keleher and Verrinder, 2003; Griffiths and Jordan, 1998; Lawrence and Schank, 1995). The focus is often looking at the number of instances, possibly the length of an event and/or the time of day it occurs. The diaries can either be purely quantitative, where people are asked to record each time an event occurs, or mixed where they are asked to record, for example, frequency of symptoms, alongside their thoughts and feelings about the event in question. Another way diaries are used as an intervention is in intensive care units, where critical care nurses will write a diary for unconscious/semi-conscious patients and their families, which has been shown to facilitate recovery and prevent post-traumatic stress (Ednell, Siljegren and Engström, 2017) for patients who were not aware of what was happening at the time. Writing the diary has also been shown to provide a useful *written* outlet for reflection for the critical care nurses on both their work and the situation of the individual patient, and Ednell, Siljegren and Engström (2017) suggest these might be useful in other areas of health care, such as palliative care or in dementia care.

In research, diaries are not widely used by health and social care researchers (Hinsliff-Smith and Spencer, 2016). However, the health diary provides information about symptoms in more detail than an interview where a person will estimate as best they can how many times something happens in a day or a week (Jacelon and Imperio, 2005). In retrospection, during an interview after the event(s), issues of recall can cause over or under estimation i.e. recall error (Reynolds, Robles and Repetti, 2016) or recall bias (Aroian and Vander Wal, 2007). A key reason for this is that the symptoms during the time span the researchers are interested in are redefined by the symptoms the person is experiencing at the point at which the retrospective data is collected.

Another type of bias which can be evident in interview data relates to social acceptability of activities, where participants over-report time spent on socially desirable activities and under-report those that are not (Juster, Ono and Stafford, 2003). This is particularly difficult for researchers looking at sensitive subjects such as sexual behaviour (McAuliffe, DiFranceisco and Reed, 2007; Coxon, 1999) or alcohol consumption in young adults (Townsend and Duka, 2002). In both these research areas, it was found that when completing diaries, participants recorded higher numbers of riskier or less socially acceptable behaviours, than in stylised questionnaire estimates of those behaviours over the same period. This suggests that when aggregating and estimating, participants are not as accurate when using these traditional research tools as they are when recording their actions more contemporaneously in the diary. In the McAuliffe, DiFranceisco and Reed (2007) study of the accuracy of retrospective survey data compared to daily sexual activity diaries found that the frequencies of sexual behaviour and condom use were subject to reporting errors as high as forty percent in the surveys. Likewise, in the Coxon (1999) validation study of homosexual behaviour, the reporting error of highest-risk sex in questionnaire estimates was fifty five percent.

However, there is some evidence that diaries can lead to under-reporting in some circumstances. Rosner, Namazi and Wykle (1992) undertook research comparing interview and health diary as data collection tools with older adults, specifically gathering data about chronic health conditions. They noted that health conditions seemed to be under reported in the diaries compared to interviews. They found that many of the older people felt that they were in good health despite any chronic health condition, especially conditions controlled by medication (e.g. hypertension), or which they have had for many year (e.g. arthritis). They noted that self-defined levels of health are relative to expectations, and that by older age, issues of acceptance of chronicity of some conditions have been resolved and 'an accommodation made to new physical realities' (p. 260). A similar psychological acceptance has been mooted as a reason for general higher levels of self-rated health and well-being in disabled and older adults, i.e. they may not be in what could be described as perfect health, but that is their reference point for rating their health and associated well-being (See Bowling *et al.*, 2007; Albrecht and Devlieger, 1999; Wilcock *et al.*, 1997;). Weaknesses in the diary format and instructions may have caused the under-reporting with more specificity needed. The extra prompting in the interview situation could possibly counteract this effect and account for the higher reporting in that situation.

Aroian and Vander Wal (2007) undertook a similar comparison of health diary data compared to retrospective interviews in a study which used secondary analysis of data already collected. They found that a 7-day health symptom diary and retrospective interviews were equally valid in obtaining the information, but that there was a drop off rate in reporting of more frequently

occurring symptoms in the health diary over the seven days, which they hypothesised could be due to participants taking these symptoms for granted, i.e. a similar issue as found by Rosner, Namazi and Wykle (1992). Their advice in relation to using diaries in research was that they were best used if time series data was needed, to investigate how symptoms or actions 'unfold over time' (p. 334) and that researchers should consider how the phenomenon to be studied is perceived by the participants prior to beginning the study. Hinsliff-Smith and Spencer (2016) suggested that health diaries should be used if it is expected that activities or events will change over time and context is also considered important. In their study of breast-feeding experiences, they used an unstructured diary, which women kept for six weeks and were then analysed qualitatively. They felt that research diaries, especially when unstructured, worked well for collecting data involving complex and sensitive healthcare issues (Hinsliff-Smith and Spencer 2016) although they needed to be managed through clear instruction and support for the participants throughout the project. Hinsliff-Smith and Spencer (2016) used the diary writing as a reflective process about breast feeding. All the participants were offered the return of the diaries at the end of the study, which they all accepted, demonstrating how much they valued the process/activity of engaging in the diary writing.

Richardson (1994) reviewed the health diary as a research data collection tool, and highlighted the utility of this tool for collecting information about symptoms and health related actions daily but suggested, however, that the participant should be able to complete the diary sheet in 'less than 5 minutes' (Richardson, 1994, p. 785) per day to encourage continued completion of the diary. This suggests that the diary would need to be a very brief affair, with tick boxes or single words recorded against time slots, providing mainly quantitative data. Keleher and Verrinder (2003) (see also Humphreys, 2000) went against this trend and used health diaries with both open and closed questions. 112 participants recorded their family's use of health services, episodes of illness and health promotion activities along with giving their reflections on services on a weekly basis over 16 weeks. This was in a rural and remote area of Australia, where access to health services was somewhat limited. Despite what seems to be a large participant burden, in terms of length of study and the content required within the diary, the 112 family diaries available for analysis represented a 95% completion rate.

Keleher and Verrinder (2003) concluded that the completion rate was due to clear instructions, regular follow up during the study by the research team, personal collection of completed diaries and to the clear commitment of the participants to the completion of the diary. They also noted that participants used the diary keeping as a tool to help them reflect upon their own and their family's health, and that this 'seemed to enhance their capacity for observation about the issues they were experiencing' (p. 440). Humphreys (2000) noted that the richest source of information

in the study was the weekly open-ended question 'any other comments', which allowed participants to highlight the most significant issues relating to the health and well-being of the family each week, in their own words, not conforming to set way of recording it or to any particular coding scheme. He felt that this qualitative data demonstrated that there were 'health issues that families felt unable to report easily in their responses to closed survey question' (Humphreys, 2000, p. 176) which linked to mental and social well-being, not just to physical health, such as stress, smoking and alcohol consumption. This links back to the earlier discussion of underreporting of some activities in questionnaires, or in interview situations where there are considerations of social acceptability to navigate as people prefer to put themselves into a good light with researchers.

This was a consideration for Thomas (2015) with her diary study of student nurses' first placement experience, where she felt that there was a risk of the participants 'creating idealised accounts' (p. 26) in a retrospective interview, compared to the diary as user friendly, and able to allow data generation 'in its natural state.' (p. 27) Thomas (2015) wanted to minimise her impact upon the data produced, therefore she provided an unstructured diary; encouraged diarists to decide for themselves what to include in their diaries; and did not contact the students during their placements to prevent any feelings of coercion this might engender in the participants. This hands-off approach led to rich, detailed and contextualised data, and Thomas (2015) recommends this method of data collection to other health researchers. Meth (2003) also used an unstructured solicited diary in a qualitative study looking at experiences of domestic violence for women in South Africa as a contextualised engagement in the research process within the ongoing social and physical realities of the diarists, i.e. the diaries were written in the home environment wherein the incidents of violence they were writing about were taking place. Reynolds, Robles and Repetti (2016) call this increased 'ecological validity' (p. 442). 39 out of 40 diarists in the Meth (2003) study returned their diaries at the end of the 4-6-week period, which was a very good completion rate. It seemed there were two reasons for these completion rates, firstly the women were paid for giving in their diaries at the end of the study, and secondly, they felt invested in the project and that it was good to bring this hidden side of their lived experience into the light.

### *Time Use Studies*

Whereas health diaries are concerned with a behaviour or a symptom and how often it occurs, rather than what occupies a person's time overall, time use studies look at what people do with their time, across a set time-period. Time-use studies are certainly not the sole domain of occupational therapists and scientists, but have been carried out over many years across many disciplines. There is a cross-national association called the International Association for Time Use

Research (IATUR) which has the stated aim of facilitating 'exchange of ideas, methodology, and data collection techniques among researchers and compilers of official statistics regarding daily activity patterns and changes in people's behaviour over time' (IATUR, 2017, p. 1). On reviewing the associated e-journal the majority, if not all, of the data collected for time-use studies tends to be quantitative in nature, which is to be expected in relation to research which looks at population level trends in use of time, often using secondary analysis of census and other officially gathered data. This research into what people do with their time has a range of different strategies used, mostly quantitative; some mixed methods and a few qualitative.

One method which has been used frequently is known as a stylised measure (Kan, 2008). This is where respondents are asked either within an interview or questionnaire, so in a written, online or verbal media to aggregate details of their time use, usually into pre-set categories of activities. There are many issues with this from a quantitative view point, as selective recall and error in aggregation are a real possibility (Kan, 2008; Juster, Ono and Stafford, 2003). Errors can be simple recall error, but also higher estimates of socially acceptable activities compared to less socially desirable activities, and less frequent or inaccuracy in recording of secondary or nested activities (Stafford, 2009). There have been studies comparing the relative 'accuracy' of a stylized method to either a time-diary or experience sampling method (ESM), with varying results (Robinson *et al.*, 2011). However, the consensus seems to be that there are over estimations of some activities in these data collection methods compared to either of the other two methods of collecting data (See for example Robinson *et al.*, 2011; Kan, 2008; Lee and Waite, 2005). Robinson *et al.*, (2011) note that dairy data reliability and validity has also been supported through comparison with other diary studies and with other means, such as direct observation and ESM studies.

Moving then to discuss the Experience Sampling Method. This was introduced in chapter two as a methodology used in some research into occupational balance by Jonsson and Persson (2006). The ESM method was developed to look at the dynamic interaction between a person's skills and the challenge of an occupation as it related to flow theory (Csikszentmihalyi, 1993). 'By relating these two factors to each other, different categorisations of experiences can be made' (Jonsson and Persson, 2006, p. 62).

The premise of this data collection method is that respondents report their exact activity when a pager, or smart phone, randomly signals them, along with whatever else the researcher is investigating. Detailed information can be asked at that moment which would be difficult for the person to recall later (Juster, Ono and Stafford, 2003). This approach has the merit of data being recorded during the occupation, so recall is not an issue, but by the very nature of the randomness means that qualitative data could be difficult to obtain, depending on what the person was doing at that point. Also, as it is an interruption during an occupation, the participant



has to be willing and able to stop what they are doing at that point to engage with the research. This means that it is a more quantitative method, as it cannot ask for detailed qualitative input every time the beeper goes since this would not always be convenient (Juster, Ono and Stafford, 2003). It does, however, examine occupational experience from the respondent's view point even if it does not lend itself to asking for more qualitative information from people about their experience.

The ESM data can be used to estimate time spent on a wide range of activities engaged by a particular population, by drawing together the information from a sample. The information is not contextualised as there is no indication of what they were doing before or after the occupation they are currently engaging in and, to reduce participant burden, the alarm cannot be set to go off too often, for example, in Lee and Waite's (2005) study comparing marital partners' time spent on housework, participants were signalled 56 times over a week (8 times a day). Although the data was from 265 married couples, this does not feel like a large amount of sampling to be able to draw out reliable estimates of the amount of time spent in specific activities.

Hunt and McKay (2015) reviewed time-use studies within occupational therapy and occupational science. Only five percent used an ESM, with a further three percent using spot observations. Twenty one percent used what could be considered a stylised measure as they were occupational questionnaires, but 70% used some form of time diary data collection tool, either as a self-report, yesterday-diary interview or time-geographic diary method. These were all mainly quantitative tools, but some qualitative questions were included, and sometimes a diary was paired with an interview and qualitatively analysed. (Hunt and McKay, 2015)

Table one lays displays the types of data collection strategies used to collect data about activities engaged un over time.

Data Collection Method	Discussion
Time diary methods (TDM) – self-recorded	This is a paper activity log (Backman 2004). Respondents are asked for a non-directed chronology of their activities covering a 24-hour span. Typically, they are asked to recall a specific week or weekend day and how they spent the time sequentially in blocks of 15-30 mins – possibly also recording where and with whom. It is recorded contemporaneously to prevent possible recall issues. How long a self-recorded time diary should be kept is a matter for debate. If not kept for long enough this will not capture all the activities the respondent engages, if kept for too long then issues of participant compliance can arise. The diary can be open format, where the diarist records the activities in their own words, or pre-coded where diarist just ticks a box for a certain time-period to denote what they were engaged in during that time, from a list of already decided activities or categories of activities. Most frequently time diary methods, both self-recorded and yesterday diary interviews produce quantitative data, for population level studies looking at, for example, average time people in a population spend in certain activities, participation rates in the general population and comparisons over the average against certain sections of the population (Juster, Ono and Stafford, 2003).
Adjei, Brand and Zeeb (2017)	Large, cross-nation use of self-administered time-diary data from the Multinational Time Use Study (participants from Germany, Italy, Spain, UK and US), which gives 24-hr time-diary information from participants in 25 countries in total. This study used data from 31415 people over the age of 65 to consider if time use related to social roles could explain gender differences in self-reported health among the elderly in comparable countries.
Lader, Short and Gershuny (2006)	Use of UK Time Use Survey, 2005 from the Office for National Statistics to review what people in the UK are doing with their time. Example of a time-use diary used at population level, using pre-set coding scheme, which makes it comparable across nations (see e.g. Adjei, Brand and Zeeb, 2017). It also produces some interesting statistics at national level regarding what older people do with their time. For example, in 2005, time spent reading is positively related to age, with oldest age group, 65 and over, spending more than an hour a day reading, compared with approx. 10 mins for 16-24 yr-olds.

<p>Sandqvist and Eklund (2008)</p>	<p>44 women of working age with chronic limited systemic sclerosis completed self-report 24-hr diaries, plus sociodemographic information, organ assessment (skin thickness and pulmonary function), and questionnaires re occupational factors and satisfaction. Diary data was analysed to pre-set codes, and a time-budget assessment was made of occupational pattern i.e. percentages spent in certain categories of occupation, and the findings suggested that more time working was linked to higher levels of well-being. <i>This was not, however, linked to occupational balance as it was noted that there was an affective element to this and pure time use would not be a sufficient measure. The difficulty with using pre-chosen descriptors and participants understanding of these was also noted.</i></p>
<p>Pentland, Harvey and Walker (1998)</p>	<p>312 men with spinal cord injuries completed a time-dairy for two days, and completed several psychometric tests looking at life satisfaction, adjustment to disability and perceived health, as well as satisfaction with the balance of occupations in which they engaged. The study examined the relationship between time use and health and well-being in men with spinal cord injury, in a quantitative analysis. <i>The findings suggested that the meanings attached to the activities engaged in were more important to satisfaction with time use, sense of well-being and perceived health than the actual number of minutes spent engaging in the activities. This is more evidence that occupational balance is about more than just time spent in different categories of occupation.</i> Pentland, Harvey and Walker (1998) suggest that the 'contextual intrinsic aspects of the time (meaningfulness, challenge, satisfaction) for the individual...may in fact override objective time use'. (p. 20) The conclusion is that a small amount of time engaged in a personally satisfying activity may be much more predictive of health and well-being than 'more time spent in minimally to moderately satisfying activities' (p. 20).</p>

'Yesterday Activity Diary' Interviews	TDM can be a 'yesterday activity diary' interview (e.g. Leufstadius <i>et al.</i> 2008). Systematic recall of someone's use of time over a given 24-hour period, by recording retrospectively the sequence of activities undertaken, including start and end times. Often also record where/who with/was any other activity also going on (Krupa <i>et al.</i> , 2003). The prior 24hr format will not fully reduce recall bias and means data is only for a 24hr period – multiple interviews to ensure a full picture of the person's occupational patterns is time consuming and expensive in terms of researcher's time.
Krupa <i>et al.</i> (2003)	Time-budget recall diary interview: 27 Clients from Assertive Community Teams were interviewed X2 and asked to recall what they had done during the previous 24hrs (both weekdays), starting at 12.01am. Responses recorded verbatim and the activities coded to a pre-existing coding scheme. The purpose was to look at the patterns of time use of the clients of the service, in comparison to the general Canadian population.
Tjörnstrand, Bejerholm and Eklund (2011)	88 persons with psychiatric disabilities completed a time-use diary for the most recent day at the day centre. Although this was not set up specifically for the researcher to interview the participants to obtain the data, most of the diarists needed help to complete it, so it amounted to the same thing i.e. 30/40 min interview time-diary. The purpose of the study was to review the characteristics of the occupations engaged in by the clients across the day, how these were perceived by clients themselves
Eklund, Erlandsson and Leufstadius (2010)	103 participants, visiting an outpatient psychosis unit completed a time-use diary interview, covering the temporal occupational pattern of the previous 24 hrs, along with measures of occupational value and satisfaction. The diary data was categorised to pre-set codes. The aim was to review time use in relation to valued and satisfying occupations for this client group

Freedman <i>et al.</i> (2012)	<p>751 married individuals aged 60 or over, completed 1498 24-hr time-diary interviews - one for a weekday and one for a weekend, from each partner, also took measures of well-being. One or both had to have a chronic health condition which limited their daily occupations. Open-diary format, researchers coded to pre-set codes afterwards. The aim was to look at whether engagement in certain occupations had a role in linking disability to well-being. <i>The study did not find a strong case for this, but suggests that efforts need to be taken to ensure older people with disabilities can continue with voluntary and physical activities, which could be beneficial, as could dealing with pain and fatigue associated with some chronic conditions</i></p>
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<p>Time-geographic diary method</p>	<p>In this approach, the multiple dimensions of time and space throughout a day or days are a key focus. The time-geographic method combines this information with analysis of people's social networks as they move through their everyday lives. Diarists record the occupations engaged in and when, places they were in, who they spent time with, other occupations they might be carrying out at the same time, e.g. watching TV and ironing clothes, also, depending on the slant of the research they might also record subjective experiences such as state of mind or sense of well-being. The advice is that a Time-geographic diary needs to be kept over a period of approximately one week to capture the rhythm of the person's occupational life (Kroksmark <i>et al.</i>, 2006).</p> <p>Where this method really shows its difference is in what happens with the data, it is categorised to set coding schemes and put through specific software to produce a series of graphs which illustrate the participants overall pattern of occupations and specific occupations engaged in throughout the day.</p> <p>Four contexts are identified:</p> <ul style="list-style-type: none"> <li>• Activity Contexts <ul style="list-style-type: none"> <li>○ Every day – complete uninterrupted sequence over 24hrs</li> <li>○ Project – diary analysed focussed towards occupations towards a common goal e.g. food preparation, or studying for a degree</li> </ul> </li> <li>• Geographical – moving within and between places whilst engaging in occupations</li> <li>• Social – analysing interaction with social groups diarist engages with</li> <li>• Experiential – subjective experiences - body and mind, perhaps where occupations prove difficult physically or emotionally</li> </ul> <p>Above is a sample graph reproduced from Kroksmark <i>et al.</i> (2006, p. 14)</p>
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Björklund <i>et al.</i> (2014)	151 participants with a mean age of 76 kept diaries for 7 days. The data was then entered into the software program VISUAL-Time-PACTS, under pre-set codes for activities, and graphically interrogated. The aim of the study was to expand knowledge regarding patterns of daily occupation for older adults. <i>The results demonstrated that during the 24hrs there were six pooled intervals of different lengths dominated by different spheres of occupation, which basically demonstrated a similar temporal organisation to the day as for those of working age.</i>
Erlandsson, Rögnvaldsson and Eklund (2004)	Time-Geography 24hr diary interviews (45-60 mins) with 100 working mothers, a working day. Data coded and transformed into time-and-occupation graphs for pattern recognition analysis. Aim to devise a logical way to characterise and recognise different patterns of occupations
Erlandsson and Eklund (2006)	Yesterday diaries of 100 working woman – see study above – investigated time-and-occupation graph patterns linked to different levels of well-being.
Orban, Edberg and Erlandsson (2012)	Two working married mothers, kept diaries of a typical working day twice, with 10 weeks between the two completions. The diaries were analysed and categorised into software to produce time-geographic graphs (program was DAILY LIFE version 2008). The completed graphs claimed to show how ‘occupations, places, social networks, and state of mind are intertwined during 24 hrs’ (p. 251). The method was then linked to therapeutic use through the deployment of a recall-stimulated interview to enable reflection upon occupational pattern using the graphs; and review if this was a useable method as an intervention strategy. <i>Outcome suggests that this could be the case when considering lifestyle redesign type interventions.</i>

Table 1: Activity Across Time Data Collection Strategies

As can be seen from the discussion and critiques above, diaries per-se have not really been used to look at people's occupational engagement over time, more as a snapshot at a particular point, relying either on data relating to the last 24hrs; to a specific point in a day; or on a person's memory when considering an interview process. Qualitative diaries have been used in health and social research to look at a symptom or behaviour over time, but not to consider a person's life pattern as a whole.

### *Advantages of Diaries*

To summarise then, using a diary provides a richer collection of information regarding the activities people engage in due to the timing of their completion close to the events. They are an excellent resource for investigating routine or everyday processes compared to an in-depth retrospective interview, where people can offer more historical information or general opinion (Alaszewski, 2006). When asking people to consider occupations and activities which are part of their daily routine, and do not stand out for the individual, this is an advantage. Diarists can record the fabric of their life more richly as even actions they consider ordinary will be noted in the diary. Also, it gives the 'ability to capture events close to when they unfold and the potential to trace events over continuous time' (Elliott, 1997, p. 1) without encountering the selective recall issues and telescoping (Keleher and Verrinder, 2003; Bolger, Davis and Rafaeli, 2003) relating to interview situations. Telescoping is a form of distortion when recalling events in retrospect linked to interviewing (Clayton and Thorne, 2000) where the time line of those events may be incorrect and the 'mundane' parts of the week could be missed out altogether. For this study, the effectiveness of diaries to collect the mundane is a definite advantage and the criticism that they are not useful for collecting data on 'unusual' events (Burman, 1995) is not relevant as it is the usual that is being explored.

In relation to what the diarists record, another advantage of this data collection tool for this study, with a constructivist approach, is the 'long-arm' way in which data is produced. In the interview setting the idea of creating a joint social reality can be clearly seen as the researcher and the participant are in a dialogue where they together create the direction in which the interview proceeds, and what information is gathered. The interviewer has a direct influence on the direction of the interview through the questions asked, and through the body language offering positive encouragement if the interviewee is going in the right direction.

Although generated for the purposes of the research, the researcher has less direct control over what data is produced in the reflective diary. This is also congruent with the current ideas in research about empowerment of research participants, with a conscious move away from



hierarchical research relationships and the more active involvement of participants in studies of their lives (Meth, 2003).

Diarists can decide, in a free-form diary, within the parameters of the study, what to include, as they are doing it independently of the researcher or, as Snowden (2015) suggests, in a way 'largely uncontaminated by the research process' (p. 39). Researchers using diaries have noted the added extra content provided by diarists in open format diaries. Meth (2003) suggests that the longitudinal temporal nature of a qualitative diary, and that it is a discontinuous process, allows for a break in thought processes between entries which gives a more rounded view of the diversity of thoughts and feeling of a human being across time. She also noted that participants could share information with her in the diary which they were not able to share verbally, giving her a deeper understanding of their situations. Jacelon and Imperio (2005) found similarly with a study with older adults that as well as answering the questions, the diaries also gave information and insights about the participants values. The diarists would include, for example, newspaper clippings, pressed flowers, material on Black History Month to contextualise diary entries. This suggests to me that if the data is sensitively and comprehensively analysed, that the research participant has a strong voice in the constructed themes and theories arising from the data. There is more than enough information within a well-constructed qualitative diary collection strategy to provide the strong basis for this.

Another advantage of the diary format, in relation to my study is the fact that it is written, and not in direct interaction with the researcher. Jacelon and Imperio (2005) offered their diarists three choices for how to complete their diaries, written, audiotape or telephone diary – where a researcher would have an interview with the diarist every other day for two weeks. On transcription, they noted that the data they got from the telephone diaries was the shortest, and tended to be more 'concrete, lacking the introspection' (p. 993) of the other formats. The handwritten diaries gave them the most content. There is something about being able to create a record of daily activities, and reflect upon these which appears to be more powerful, and easy to do, alone, and if possible in writing. Poppleton, Briner and Kiefer (2008) noted that writing a diary enabled participants to reflect on events and activities which they might not have thought about otherwise, and suggest that the diarists not only record 'experiences but to some extent shape them as well.' (p. 499). Orban, Edberg and Erlandsson (2012) took their research a step further by producing a graphical representation of their respondents' time use, asking them to then look at what they were doing with their time at two specific points. The participants had not noticed many of the changes in their time-use over the 10 weeks between the two data capture points, until they had the chance to look at the graph and reflect. Humphreys (2000) noted that 'the diary methodology enabled people to reflect on their health and wellbeing' (p. 177), in his

health diary study – this had not been the intention of the study, but seemed a positive outcome. What seems to facilitate the reflective process is for the person to be able to free-form record their activities as they go along, and to think about what these mean to them – either at that time or at a later point.

A word of caution is needed here, however, as elicited diaries are not written within the participants' own frame of reference, for themselves (Elliott, 1997). Unlike personal diaries, these are written with a particular 'other' reader in mind and are set within a structure of the researcher's design. Jacelon and Imperio (2005) noted, as did Elliott (1997), that diarists write directly to the researcher within their diaries, overtly recognising the destination for the diaries. Elliot (1997) also felt she was an actor in them. She was mentioned in people's diaries when she had contact with them and the diaries were written almost directly as correspondence to her. This was also apparent in the pilot study (Chamberlain, 2007) and in this current study, where participants wrote comments directly to me, sometimes using my name, and in places treated me almost as a confidante. They were writing their diaries to me and possibly felt I knew them well through their revelations over the fourteen days. It was more noticeable in the second part of both my studies and was also something noted by Jacelon and Imperio (2005) who felt that 'the introspection in the entries increased, and the self-conscious comments decreased.' (p. 994). This link to the researcher could combat the main disadvantages of diaries which are discussed next, and explain the normally high return rates for diary studies (Reynolds, Robles and Repetti, 2016).

### *Disadvantages of Diaries*

A disadvantage in the use of reflective diaries is what Burman (1995) terms 'respondent burden' and Keleher and Verrinder (2003) link to 'participant fatigue'. The writing of a reflective diary with an expectation that the participant not only describes an event but also reflects upon its personal meaning, takes a large commitment on the part of the individual. This level of commitment could lead to reluctance to be part of the study, or an initial enthusiasm which quickly becomes dampened if the diary will be kept over an extended period (Reynolds, Robles and Repetti, 2016). However, despite these concerns, the discussion above outlined the frequency of high completion rates. Elliott (1997, p. 1) suggests that 'the notion of recording one's daily existence is more familiar to some people than to others' which can have an impact upon an individual's willingness to participate or compliance once within the study. Elliott (1997) had regular contact with the diarists during her study and found that individuals needed reassurance during those visits that they were completing the diary correctly. They seemed to grow more confident the longer they had been participating in the study. Burman (1995) also advocates clear instruction, follow up and collection procedures to ensure adequate participation. She suggests that regular telephone contact with participants tends to improve completion rates when compared with mailed

reminders. In my pilot study (Chamberlain, 2007) telephone contact was maintained with the diarists and only one participant dropped out at the start of the study. In the current study, telephone support was also offered to the participants, and the dropout rate, whilst higher than in the pilot study was still quite low, with three participants completing only one week of data. What counters the effects of participant burden seems to be clear explanation of the commitment and clear instructions, coupled with regular contact with the participants during the study, or the offer of this if the participant needs it.

### *The reflective diary*

The decision to use the diary in this study was driven by the very good reasons above, around contemporaneous collection of rich data, but also by a personal belief that the qualitative written word is a neglected area of study in relation to humans' doing and being. Whilst quantitatively, the use of questionnaires and written facts and figures hold sway; within qualitative data collection, it is the spoken word which is by far the most researched, often transcribed into written formats for analysis but starting from a verbal dialogue. Silverman (2001) suggests that this predominant use of interviews reflects a contemporary cultural bias towards verbal data rather than other expressions of human activity. Collecting data in written form is one such expression and has some similar and some different considerations for its use compared to verbal interviews.

There is a particular process that an individuals' interpretive analysis goes through when reflecting on action in writing, in retrospect (but still close to when the activity took place). This is noticeable in students when they reflect on cases and significant experiences using reflective models, such as Gibbs (1988) or Driscoll (1994) and I believe the same could be true for older people reflecting on the panorama of doing in their lives. It has also been suggested that keeping a diary heightens people's awareness of their life's structure and can impact on what they do with their time (Milligan, Bingley and Gatrell, 2005), and as has been discussed, in chapter two, older people also suggest that they get more out of life if they consciously review and plan for transitions such as retirement.

The diary format chosen for use in this research project was an original design which was produced for a smaller study, piloting research diaries as a stand-alone data collection tool (Chamberlain, 2007). There had been no templates available for a diary format which would meet the purpose of the intended research although there were examples of different formats within the literature (Jacelon and Imperio, 2005; Lewis and Massey, 2004; Richardson, 1994) which informed the diary design for the previous project. Whilst designing the diary, the considerations regarding wording and format were the same as with an interview schedule or questionnaire design. Questions needed to be clearly understood and not ambiguous, which was

especially important when designing a document for self-reporting (Newell, 1993) where the participants, to a large extent, interpreted the questions themselves. To aid this there needed to be a shared vocabulary between the researcher and the respondent with limited use of jargon. It is estimated that 'five percent of the population are functionally illiterate and the majority do not have a reading vocabulary beyond that used by the tabloid press' (Newell, 1993, p. 104), so simple words and uncomplicated sentences are the most inclusive. This must be carefully executed to avoid alienating more literate participants. Care was needed to ensure that the diary design was an inclusive one, using non-sexist language (Eichler, 1991) and keeping bias to a minimum. How this diary could be transferred to an alternative media also had to be considered, in case, for example, larger print or tape recording were necessary.

The diary was designed in as open a format as possible so that participants would not feel constrained in how they used the paperwork. It was designed with two columns one asking for a description of what they were doing and one asking for their thoughts on this (see Appendix 3). Alongside this an in-depth sheet (see Appendix 4) was designed in which participants would be required to pick one or two occupations/activities undertaken each day on which to go through a reflective cycle process (Gibbs, 1988). There was also a general information sheet (see Appendix 5) so that some basic information, such as age and gender and work history could be collected. The diary was also reviewed by an active older person for wording and ease of use, prior to it being used in the previous study.

The points raised in the literature meant that when the reflective diary was designed, participant burden was a factor to consider. The Good Clinical Practice Principle 2 states that 'foreseeable risks and inconveniences should be weighed against the anticipated benefit for the individual trial subject and society' and that the anticipated benefits should 'justify the risks' (ICH, 2016, p. 9). This means that an assessment of the risks to the individuals involved in the research must be undertaken and the benefits of the research to the user group and/or community should outweigh the risks being asked of the participants. When assessing the risks to the individuals involved in my research, it was acknowledged that the effort of keeping a detailed diary, not just of events but also of thoughts and feelings, when carrying out activities required a lot of effort. This could lead to 'participant fatigue' (Keleher and Verrinder, 2003) and possibly withdrawal. Therefore, the information provided to possible participants had to make the level of effort required very clear, and how it was presented also needed careful consideration. One way to make the information as user friendly as possible was through the involvement of an older person in writing the instructions. This ensured the paperwork was simple, aimed at the right audience and easy to use, without being over simplified or patronising to the participants.

Previous studies have found that a clear explanation of the commitment and clear instructions coupled with regular contact with participants during the study countered the effects of participant burden (Elliott, 1997; Burman, 1995). However ongoing contact must be carefully handled so it is not viewed as undue pressure to continue with the study i.e. coercion (Economic and Social Research Council (ESRC), 2012). This was also important ethically to ensure informed consent was obtained.

Designing the diary to limit the effort required to complete it is one way to try to reduce participant fatigue. An additional point which had a bearing on this is the length of time the participants were required to keep the diary. This also impacted upon on the quantity of data produced, which then needed to be analysed. From conducting the pilot study, it was found that the data generated using reflective diaries has the potential to be very rich and dense, leading to complex, time-consuming analysis. It is important, however, when looking at individuals' occupational balance that there is enough data, spread over enough time to ensure that a typical picture of those occupations is obtained. It is suggested that 1 to 2 weeks is an optimal time for keeping a solicited diary (Jacelon and Imperio, 2005). When the aim is to develop a global picture of occupational balance keeping a diary for one week may prove sufficient to give a good reflection of the person's life and habits, but to have two weeks of data would give an even fuller picture of the planned and spontaneous nature of their occupational lived experience, and provide confirmation of ideas developed from analysis of the first week of diaries. The diarists in the pilot study (Chamberlain, 2007) kept their diaries for a total of 14 days, with a gap of several weeks between the first and second week of diary completion and the data collected gave a full picture of the activities in which they were engaging, confirming that 2 weeks is a good time scale. There is a danger that participants could lose momentum if not completing the diary for two weeks in one go, but the break gave them a rest from engaging in a time-consuming task, and allowed me to begin analysis and ask for a redirect on the completion of the second week of data collection. This is in keeping with constructivist grounded theory approach, and the idea of selective theoretical sampling once ideas are forming, so that the next phase of data collection is used to confirm or deny patterns that seem to be showing themselves in the data to that point. Helping towards the point of theoretical saturation (Charmaz, 2014).

The use of the diaries as the data collection tool enables the participants to consider how they are living their lives now and reflect on what it means to them, this is important as older people are in the process of living and their life narratives can still have a sense of forward progression (Mandel *et al.*, 1999). It allowed me to immerse myself in data reflecting older people's doing over time and get a sense of what occupational balance is to them.

The final diary forms are including in the Appendices (3-4), along with the information sheet provided to the participants (Appendix 1). Samples of completed forms are included in Appendix 6.

### The Data Collection Process

The constructivist grounded theory framework places an emphasis on constant comparison between individuals, incidents, categories etc, with the use of 'action codes' in open-coding (Charmaz, 2003) to ensure that what is developed takes full account of the lay concepts emerging from the data and develops any social theory concepts directly from them. As Burman (1995) states analysis procedures need to be planned during 'diary development or refinement to be sure that the data is in the appropriate form for the analyses. Diary data is very dense and rich, carefully prepared plans can minimize problems' (p. 6546).

This was a cross-sectional study in which the reflective diary was the data collection tool. Participants were asked to complete the diary for a total of 14 days, in the diary they were asked to record occupations they engaged in and their explanations of their feelings, meaning and importance to themselves. To ensure that rich data was collected regarding why older people engage in certain occupations, the participants were also asked to choose at least one per day on which to perform an in-depth examination. The data was collected in two batches, ensuring that data collection and analysis was an iterative process (Mays and Pope, 1996). Diarists kept the diary for seven days and returned the data by post for analysis. This first batch of data was analysed using a constructivist grounded theory approach (see data analysis section), leading to the definition and tentative conceptualisation of relevant ideas which were used to guide further data collection, i.e. theoretical sampling (Charmaz, 2006). The term theoretical sampling does not infer finding new respondents but is the seeking of 'statements, events or cases that will illuminate your categories' (Charmaz, 2006, p. 103). It therefore involves continuing to use the use of the same respondents but asking for them to refocus their diaries around emerging concepts was in keeping with the approach. For the second week of data collection the diarists were asked to continue to complete their diaries as per the first week as there was no one area that needed more focus than any other. It was the concept of their balance which remained of central importance to this study.

During the data collection period, regular telephone support of the diarists was offered. The participants were free to contact me during that time if they have further questions or worries. As stated the participants returned the first batch of diary sheets by post. After an initial analysis of those sheets the participants were asked to start the second seven days of diary keeping. At the end of the second seven days they posted in the last batch. All participants were sent a note thanking them for their participation.

## Data Analysis

### *Procedure*

The diary data was typed, and analysis of the data was undertaken with the aid of the software package QSR NVivo Version 10 using the procedural guidelines offered by Charmaz (2014; 2006; 2003). As discussed in the above section on constructivist grounded theory, a term developed by Charmaz herself, this view and related procedure are the most 'comfortable fit', with my perspective of qualitative social and occupational science research. The guidelines offered by Charmaz (2014; 2006; 2003) are to work through initial, then focussed coding and then into the theorizing stage, whilst contemporaneously encouraging memo writing. She also has guidance about theoretical sensitivity, sampling and sufficiency.

### *Initial Coding*

This began with open coding of information i.e. naming and categorising of phenomena through close line-by-line examination of the data. The coding was in 'action codes' (verbs rather than nouns wherever possible) which give insight (conceptual rather than descriptive) into what people are doing and what is happening in a setting (Charmaz 2014; 2003). During the initial coding stage of the analysis, 565 codes were identified using NVIVO, with the line-by-line analysis leading to 15925 coding references across the data sources available, comparing incidences and actions across time for individuals and between individuals' diary entries. It is this close scrutiny of the data, advocated by Charmaz (2014) which ensures that the codes, categories and themes *emerge* from it rather than preconceived ideas and coding schemata being imposed upon it. Some initial codes were 'in vivo' codes, i.e. using the words of the diarists. For example, 'opened-up computer' became a code to cover general computer use by the diarists, 'Brain Training' was used to describe crosswords, Sudoku and brain training games on hand held devices that diarists used to keep their 'minds active'. During this stage of the analysis, using a constructivist approach, Charmaz (2014) suggests that you are mining the early data for ideas and lines of analysis to pursue, with a mind open to where the data takes you in terms of 'possible theoretical directions' (p. 114). See Appendix 9 for a small sample of the initial coding schemes generated.

### *Focussed Coding*

Here the most significant and the most frequent codes from the initial coding were used to sift through large amounts of data, making connections between emerging categories in the data and with constant comparison across the data (Charmaz, 2014). Focussed coding is a way to check out preconceptions about the subject area, and may well lead to the need for further data collection (i.e. theoretical sampling). As coding progressed through initial coding into focussed coding, the codes were grouped and regrouped into folders within NVIVO to aid my thoughts on how they fitted together. Where there were any codes or activities that did not 'fit' with the general

patterns forming, I went back to the data to re-examine the entries and the meanings, and compare and contrast these with other similar codes and entries in other diarists' data sources. As the object of this exercise was to look at what older people were doing with their time from their own subjective standpoint and what influenced the pattern of their doing, I was not looking for positives or negatives as such, so nothing was discarded as not fitting a pattern, or focussed on as a direct contradiction of any theory I was forming at this point. For example, one diarist chose not to engage in work like that which formed their pre-retirement employment, so continuity with past employment was not a factor driving this part of their occupational pattern, this did not mean that the 'continuity and belonging' theme which emerged did not factor in how they balanced their occupations, just not in that area. Appendix 10 has examples of some focussed coding within this study in relation to 'getting older' and 'contextual issues' which were two of the groupings of the codes during the focussed coding process.

### *Memo Writing.*

Alongside the coding and comparison of data, memo writing was used from early in the research process. This is the pivotal intermediate step between coding and the first drafts of the analysis and is strongly advocated by Charmaz (2003). This technique reduces the possibility of getting lost in the data. It also enables the immediate recording of concepts in lay language and keeps a reflexive quality to the research process by encouraging constant review of the assumptions and thought processes of the researcher as well as the researched. This is a process that goes on alongside not just the analysis sections but continues into the theorizing and writing up of the research, these memos help come to a point of theoretical sufficiency, and relevance which can be tracked back to the data by another researcher, even if their analysis would not come to the same social construction or theory (Charmaz, 2014).

Below are some memo examples from this study which aided my analysis and theoretical thinking, the first of which aided my initial analysis, looking at how the diarists used activities to enable them to engage with others:

*'people do seem to develop types of friends i.e. friends linked to certain types of activities and you only tend to see those friends at the points that you are engaging in those activities and in those particular environments there are, however, some points of cross over in these relationships for example when diarist 2 goes to the local drama production with her 'keep fit friends' that is how she terms them. this is similar to the idea of keeping relationships with certain people to maintain links to past roles and memories i.e. 'the railway widows' (from previous study). need to look for similar things in other diarists' lives. Certainly, in the diarist who lost his wife, he has activities which maintain links to*



*her but also activities which acknowledge his position as her widower and give status to him as a bereaved person from this particular activity.'*

The next two memos, when added to the memo about having different friends for different activities above, started me considering the idea of occupational identity and how the diarists were demonstrating who they were through what they do:

*'get the feeling that sometimes they say things to make me either think they are a worthy and kind person, or else they are putting forward their ideas/wisdom for my consideration - sort of like a manifesto for how people should live - does this tie to social obligation and what people ought to do?'*

*'some diarists have made comments about the type of shopping they engage in - Diarist 2 talks about supporting local shops and services 'outside of Tesco's' seems to be an important point for her. She talks about trying to save the local post office as several in the vicinity have had to shut down 'Went into Post Office, we must support it as two others in the area have been closed. ' Another one talks about being careful about where the produce has come from'*

I also engaged in some simple clustering exercises in relation to my initial codes, this are diagrams in which the possible connections are explored in relation to your line-by-line coding, and how these might fit into more focused coding categories. As the project progressed, these became very complicated diagrams, but Figure 5 below is one of the first simple example of clustering:

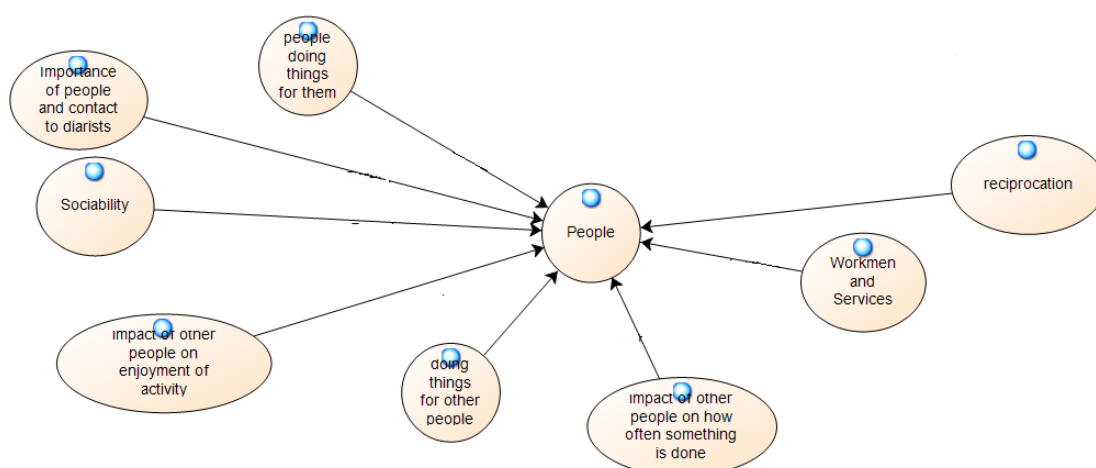


Figure 5: Early cluster exercise of initial coding

The remaining three memos are from the point of focussed coding where the codes were being grouped into subthemes and these groupings and thematic headings constantly compared and reviewed to ensure consistency with the data. The first being a consideration of the place of

health in the diarists' planning and motivation for engagement in certain activities and patterns across their week.

*'Health + Doing = Well-being - a reciprocal relationship, if bad health can't do what they want to do, they try to keep going in activities that they are convinced are good for them, sometimes also because they enjoy it but often because of health giving properties and sense of satisfaction when they've completed it*

*Feels like a motivating factor for somethings they engage in and the pattern of their lives*

*Health can stop people doing what they want and also can reduce their enjoyment, if can still do it but now with pain or increased fatigue*

*Pain is mostly not coded separately as it is part of the impact of health on activities code but there is some mention of pain without activity so there are some 'pain' codes but now in the 'codes not relevant' folder*

*Although health is not an end in itself, as a support to engagement is seems to be very important, and a lot of the activities engaged in are because they fear that the time will come when their health won't allow them to participate - some want to do it for as long as health will allow, some (more proactively) feel that engaging in certain activities will give them good health for longer - hence the motivating factor'*

The second memo relates to the importance of an area which came from the analysis which had not stood out in the pilot study data, but was very evident in this study, even before analysing the diaries, analysing the general information sheets the participants completed showed a large amount of continuity between the leisure pursuits they engaged in prior to and post retirement.

*'Continuity - This stands out as a major issue from the diaries - every form of continuity is raised - so:*

- having friends for years and valuing them and making a clear effort to keep in touch,*
- keeping links to past employment in many ways - still doing some similar work, going out with work friends, engaging in voluntary work within field that worked in before retirement*
- maintaining activities over time - so engaging in the same sorts of hobbies (e.g. darts, card-making) or the same types of sports and exercise regimes*

*This links into the 'life perspective' area as they look back and make links to the past but also look forward and plan for the future and that future contains continuity with what they are doing now which maintains congruence with what they did in the past - they are also not just*

*planning for short term i.e. the next year (other research I read contradicts this as they suggest that older people don't plan for anything past next year as they don't know if they will still have the health to do what they want [need to find this source]. Whilst most of the looking forward is positive they also look forward to a time when they can't do what they can do at the moment - with a lot of trepidation, and also practically some look to when they may die or go into a home and how their family will deal with their knickknacks etc. This is a really important area for me to delve into and is not something that came out as explicitly in previous diaries'*

Finally, the third memo, again when coding was more advanced, demonstrates how the analysis of the diaries has opened up many areas for consideration in relation to what older people do with their time, including the concept of a lynch-pin activity.

**'Occupational Balance:** *This is coding where the mention of day/week/life planning as a whole is mentioned. It is implicit in a lot of the diarists' talk about their lives, but these codes are where they refer to it directly in some way*

*Some points that I will want to delve in to*

- *Importance of health in maintaining an acceptable occupational balance - links to thankful for circumstance and to getting older codes - they write about how lucky they are to have their health so can have a busy life etc., and it also impacts on the things they do as people make conscious choices to engage in physical, social or mental activities that they believe have some health-giving properties*
- *Routine activities are undertaken at certain times of day or week - some of this from necessity e.g. classes only running at certain times, but some of it seems to be from intrinsic motivation or habit e.g. when they clean the house, read the newspaper etc.*
- *It does appear that if they are satisfied with the general rhythm of their lives and how their activities are organised/timetabled that they have a sense of enjoyment of their lives as a whole ----- does this then give an overall sense of well-being?*
- *There are energetic days and quiet days (and times of day) quite often in a particular pattern and sometimes with planning beforehand i.e. know going to have a busy day tomorrow so have a quiet day today or plan nothing in for the day after something they know will be tiring so pausing and pacing is evident*
- *It definitely comes out in the diaries that particular activities and the balance between them gives structure e.g. 'without this event, my week would have no definite beginning' This can be work (continuity with how previously organised*

*their lives), also can be leisure activity such as a walking group, it 'pegs' my week - 'gives me a fixed point'. This is a new consideration for me around occupational balance i.e. that there are key 'pegs' that are needed to hang the rest of the things they do around - a scaffolding which they flesh out with other activities that don't necessarily need a set time point to be carried out successfully. These pegs set the pattern of their lives. Even those who don't mention something like this I can probably work out from their diaries which of their activities take on this role.'*

### *Theorizing*

'From a constructivist view, researchers may use grounded theory methods to pursue varied emergent analytical goals and foci instead of pursuing a priori goals and foci' (Charmaz, 2006, p. 180). This suggests that the results of this analysis can be focused into several theoretical understandings from the data, which can then, perhaps be taken forward into further empirical study. It is suggested that a concept is ready for theoretical consideration when a point, which some grounded theorists term saturation (Strauss and Corbin, 1990), is reached. Charmaz (2003) suggests there is an elastic quality to saturation and that some researchers are never satisfied that they have reached this point. Furthermore, Dey (1999) considers the term saturation to be misleading and purports that categories are suggested by the data and when a point of theoretical sufficiency is reached, i.e. when the category had been sufficiently explored, then theoretical relevance can be proposed. In this research, the constant comparison data analysis process of following a line by line coding was conducted meticulously and led to a point where six categories or themes were developed. Each of these had several sub-themes, with many links between them, showing the full complexity of what older people do with their time. From this, a coherent theory of what occupational balance was and what the properties of this were emerged. The coding and categories arising from the data in this study, in my view, began to provide a nuanced and novel way of viewing a currently held concept within a field, i.e. occupational balance. Charmaz (2014, p. 159) advised that you do the 'fresh, heavy analytic work first', before applying any currently held ideas used to explain behaviour within your discipline. If these come into use afterwards it will be done in a more conscious and reflexive way, in which you elect to use only terms that fit your data. I held the term occupational balance as almost a 'title' only whilst engaging in the analysis, going where the line-by-line coding took me, following through into categories and themes. This full analysis, along with memo-writing and discussion with my supervisors, led me to theorizing a model of occupational balance for people active older people and the properties of this. The findings and discussion proffer the evidence for this theoretical process.

## Ethical Considerations

Ethical considerations for the use of diaries are similar to those for interviews. Informed consent must be sought, and issues of privacy, confidentiality and anonymity must also be considered.

### *Informed Consent*

The Good Clinical Practice principle 9 states that ‘freely given informed consent should be obtained from every subject prior to clinical trial participation’ (ICH, 2016, p. 9). Informed consent is considered by the Department of Health (DOH, 2005) to be at the heart of ethical research. The World Medical Association Declaration of Helsinki (WMA, 2013) contains guidance on obtaining that consent and the information that must be provided to subjects prior to asking for their consent. The main points to consider for GCP regarding informed consent are:

- the information to be given to the possible participants contains information about the aims, method, participant’s role, burden and possible risks to them of participating, what support they can expect when participating and most importantly their right to refuse or to withdraw without reprisal at any time.
- the format/method of providing the information has been considered carefully – taking into account any special needs of the participants
- the ethics committee has approved the information and its delivery method, as they have a key role in deciding if participants will be able to make an informed decision about participation
- participation must be voluntary and informed consent should be freely given

The issue of informed consent was crucial to my study, and this ethical consideration needed to be at the forefront at all times. As mentioned above, when considering participant fatigue, keeping a diary for fourteen days in total is quite a commitment and the participants needed to know what they were agreeing to. There was a responsibility on me, as a researcher to explain as fully as possible, in terms meaningful to the participants, what the research was about, why it was being undertaken and how it will be disseminated (Gilbert, 1993). Walmsley (1993) states that it is an ‘ethical litmus test of the research question, if it can be explained to the research population without too many uncomfortable euphemisms’ (p. 40). If this can be achieved then it should be possible to obtain the necessary informed consent at the outset of the project. Participants also needed to know they could stop at any time if it became too much of a burden to them, without having to offer an explanation. This is where the strategies used by previous diary studies (Elliott, 1997; Burman, 1995) needed to be treated with caution. For example, phoning or visiting on a regular basis, whilst if viewed positively could be considered as helping diarists maintain enthusiasm, could equally be deemed coercion to continue. There is some debate around the

issue of informed consent within the area of social science. Most of the criticism centres on the dominance of the biomedical research paradigm on recommendations about the best procedures and timings for seeking informed consent, and this is often coupled with the poor understanding of social science methods shown by members of many ethics committees (Boulton and Parker, 2007). More specifically, it is felt that the risks involved in social science research do not warrant the same levels of protection needed for the management of risks involved in medical research. A model of consent seen as relational, which is based on trust and continually negotiated throughout a study (Murphy and Dingwall, 2007) is more in keeping with research that affords participants more agency and choice, with a more equal relationship with the researcher than those in biomedical research studies (Boulton and Parker, 2007). However, there are still power dynamics at play in research where the researcher is from a university and this should be taken into account when considering the impact on consent and issues of what is explanation, and at what point it crosses the line into coercion. I was mindful of this during my research and decided to leave participants with all my contact details, encouraging them to contact me at any time, rather than contacting them regularly myself.

All the information provided to the participants was reviewed by my Faculty Ethics Committee and revised to ensure it fully met the above requirements, see Appendix 1 for a copy of the participation instructions.

### *Privacy, confidentiality and anonymity*

Miles and Huberman (1994, p. 293) suggest the following definitions (see table 2) of these terms:

privacy	Control over others' access to oneself and associated information; preservation of boundaries against giving protected information or receiving unwanted information
confidentiality	Agreements with a person or organization about what will be done (and may not be done) with their data; may include legal constraints
anonymity	Lack of identifiers, information that would indicate which individuals or organizations provided which data

**Table 2: Privacy, confidentiality and anonymity**

The GCP principle 11 states that the 'confidentiality of records that could identify subjects should be protected, respecting the privacy and confidentiality rules in accordance with the applicable regulatory requirement(s)' (ICH, 2016, p. 9). The Data Protection Act (DPA) 1998 was the main regulatory requirement at the time of data collection, and has implications for researchers who need to collect and process information which can be considered as personal data (as defined by the act). The new General Data Protection Regulation (GDPR) comes in to effect on 25<sup>th</sup> May 2018 (ICO, 2018), which tightens the rules further, but the definitions of personal data and instructions

around confidentiality are comparable in relation to studies of this nature. Personal data in this context is data which relates to a living individual who can be identified either directly from that data or from that data and other information which is in the possession of the data controller (ICO, 2018). The social research I engaged in whilst falling under the remit of the DPA (1998), and subsequent regulations, does not bring to light any specific difficulties around data protection, security or confidentiality. Also in comparison to an interview situation, where Miles and Huberman (1994, p. 293) suggest that an overzealous interviewer or facilitator could 'seduce respondents' into telling secrets, diary study participants are writing their responses in their own time; without pressure; they have more control over what they choose to disclose; and time to censor themselves before they provide the data. This means the risk of harm from disclosure of their information is further reduced.

The DPA (1998) has 8 Data Protection Principles which must be adhered to in relation to personal data, however DPA Part IV: Exemptions, Section 33 (1998) specifically relates to data collected for research, history or statistical purposes. These exemptions include that further processing for research purposes will not be regarded as incompatible with the purpose for which they were obtained.

The ESRC (2013) encourages secondary analysis of existing research data and has links with data service providers to support this. To ensure that a dataset can be made available for secondary analysis does require some forward planning, as the research participants may need to give their consent for data-sharing as part of the overall informed consent process. As I did not ask participants to consent to this at the beginning of the research study, the other way I could prepare my dataset for sharing would be to fully anonymise it. The ICO (2013) in its guidance to HEIs on the Freedom of Information Act 2000 points out that once data is truly anonymised it is no longer considered personal data and therefore does not fall under the DPA (1998) principles and can be shared with less restrictions. The ICO (2012) has a complete set of guidance on how to achieve this degree of anonymisation. However, as the diarists are sharing information about their everyday lives it may be that even with the diaries anonymised as a set, one person's diaries and reflective sheets could still be too unique and identifiable under certain circumstances. Within this thesis, I have removed names of people and places in all excerpts used. I have replaced names with a word signifying their relationship to the diarist, for example [husband] [wife] [son] [friend]. I have replaced place names with a descriptor word or phrase, such as [city] [town] [park] [high street]. I have also removed titles of specific clubs, local people such as Mayors, MPs, local papers and/or activities engaged in where they might cause confidentiality to be compromised by the identifier [named], for example: *9.30 Deliver some Lib Dems leaflets* [named]. This anonymisation, coupled with the fact that I am sharing excerpts, not full diaries, is

sufficient to ensure the diarists' right to privacy and anonymity. To identify which diarist certain excerpts are from and which document, I have used the coding system shown in figure 6 below at the end of each excerpt.

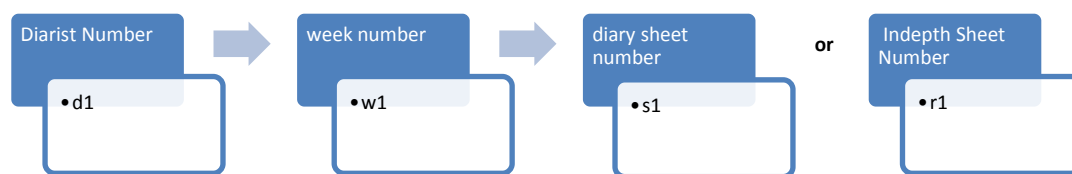


Figure 6: Diarist Excerpt Identifiers

At the start of the findings is a table of the diarists' demographic information, with each diarists' number included (Table 4). This is all still at a very general level and not detailed enough to enable participant identification.

Confidentiality of information, with secure storage is also imperative to ensure ethical use of data. No-one should have unauthorised access to that data, and in this study only I and my supervision team have had access to the diaries. The diarists' names and personal information is held separately from the diaries, and only I have the information regarding the names of the diarists. The participants were fully aware of how the data would be stored and used. I felt that this increased their trust in the process and allowed some of the diarists to 'open up' in the reflective process, enhancing the data quality (Miles and Huberman, 1994).



### *Trustworthiness*

Ballinger (2004) suggests that to ensure the trustworthiness of qualitative research the following four issues need to be addressed in the research design, implementation and analysis, as shown in table 3:

Issue	Considerations	Methods
Confirmability	Relative neutrality and reasonable freedom from unacknowledged researcher bias	Researcher diary Memo notes in analysis Scrutiny by peer Audit trail
Dependability	Is the process of the study consistent, stable over time and across researchers and methods	Coding checks Data quality checks – for bias, deceit Peer/colleague review
Credibility	Are results credible to the people studied and research article readers	Constant checking/questioning/theorising Triangulation among methods Identification of uncertainty and negative evidence Confirmation of accuracy of transcripts by original participants
Transferability	Do the conclusions of a study have any larger impact?	Enough thick description for readers to assess potential transferability, appropriateness for their own settings

(Adapted from Ballinger, 2004 and Miles and Huberman, 1994)

**Table 3: Trustworthiness of Qualitative Research**

Whilst working through this research study, there was a copy of this table at the front of my research journal so that I could keep in mind the processes in which I was engaging, and thereby ensure the overall trustworthiness of this project. The issues of confirmability are particularly well considered in a grounded theory approach as the memo writing is an integral part of the analysis, so it is something that almost ‘naturally’ occurs. The use of a research journal, or OneNote files to record decisions made during the project and the reasons for them also aided the process of ensuring the dependability and credibility of my research. Having regular meeting with my supervision team to discuss my progress; my current thinking about the codes; and, literature I was engaging with as the project progressed aided with dependability and confirmability, as did having my analysis scrutinised by my supervision team.

As the proposed research project is founded on a constructivist epistemology, initial interpretations and theoretical categories was not be shared with the participants, a process known as member checking (Ballinger, 2004). It is recognised that no two people will look at data in the same way or produce necessarily the same accounts of that data (Charmaz, 2006) so my interpretation of the emerging themes, which is my construction based on my epistemology and ontology would be different than the diarist's own interpretation. The diarists input into the shared social construction was their written word. My input is interpreting those words, both the content, in terms of what they described, but also in terms how they worded, which leads to surmising why they said it. For example, where diarists described their 'keep-fit' activities, such as going to the gym, or playing badminton, within the analysis, the actual activity in terms of what this entails would be considered, its qualities and the level of planning involved in getting there. Alongside this, there is a need to consider the context in which the 'keep-fit' activity occurred, who they did it with and whether that social environment enhanced or detracted from the experience. There is also the need to consider motivations for engagement. Also, by choosing to describe, and perhaps reflect on these activities, in an in-depth sheet, they were also giving me clues to how they want the world to view them through their engagement in doing 'keep-fit'.

Within constructivist research, it is also recognised that no two researchers will look at data in the same way or produce necessarily the same accounts of that data (Charmaz, 2006) so what is important is that another experienced researcher could see that emerging themes were true to the data, and transparently so. Again, when considering credibility, the constant comparative approach offers checks in this area. Transferability is a thorny issue when considering constructivist ideology as the belief is that what is 'discovered' is just one possible interpretation of the data and events under analysis (Charmaz, 2006). However, if the analysis is robust enough and articulated clearly it should be possible for another researcher, or practising occupational therapist in this case, to assess how this might apply more broadly.

## Practical Issues and limitations

### *My Acquired disability*

Before discussing the usual limitations and issues relating to this study, I need to acknowledge the practical difficulties arising from an acquired disability and its continuing impact upon my ability to engage fully in the research process. I had a stroke in August 2012, just as I was beginning the focussed coding stage of this research study. This led to a complete break in my research process, followed by a few attempts to reengage which did not go too well. Unfortunately, I have been left with a cognitive disability, on top of which, the medics discovered the reason for my stroke is a long-term autoimmune condition called Antiphospholipid Syndrome, which also impacts on cognitive function, memory and causes fatigue. I am on medication to ameliorate the effects of this, but it is a variable condition. What this means in practical terms is that I can no longer read and digest large amounts of text, I need to have it read to me at the same time as looking at the words if I want to be able to perform intellectual activities with it. This means all journal articles are read either on a computer screen with assistive technology providing audio at the same time, or on paper with an MP3 file to read it to me. I also have difficulty retaining some specifics in enough detail to make links, without a large amount of cognitive effort, and enormous amounts of time. This has slowed my progress considerably, but I have continued to plug away at it, as I have data and a theoretical model which I feel adds to the current knowledge base and needs to be shared. I have found that the use of diagrams and headings helps me retain information more completely, hence the various diagrammatic representations of the text throughout this thesis. I will now move on to discuss some of the study limitations

### *Limitations*

This is a small qualitative study, which wanted to look at what active older people do with their time and why. The respondents who came forward were a fairly homogenous group in terms of a white-collar work history, so future research would need to try reach a more diverse range of participants, perhaps by making it clearer that there are other methods of providing a diary e.g. online, audio tape, video blog.

In relation to gender and ethnicity, there was not a gender bias, but all respondents were white British, which makes this model of occupational balance only relevant for active older people from the majority ethnic group in this country. Although occupational balance is a universal concept, it remains to be seen how it manifests itself and what properties are part of the concept for different older people in different cultures, with different customs and practices.

People of any level of income can have occupational balance (or imbalance), and, for example, engage in fulfilling occupations outside of work, even if the actual work is not enjoyable and seen as a means to an end. However, there are people in dire poverty and/or in extreme social isolation, to whom this cannot be said to apply. In other words, they are in a state of

occupational imbalance, even in an affluent society such as the UK, and it should be society's duty to ensure that no older person is in that level of poverty and isolation (Wilcock and Hocking, 2015). Whilst it could be argued that this research does not take those people into account, I do acknowledge that Western societies, as per any other society, have their forgotten people. However, the purpose of this small study is to offer a new perspective upon the concept of doing in later life, which does not conform to current media stereotypes; offering a realistic picture for the majority of active older people.

Leading on from this, I have focussed upon active older people and my criteria for inclusion precluded those who were frailer from participation. Further research to see if they have occupational balance, is needed, which was outside the scope of the current project. This could consider whether there is a change in the elements that constitute occupational balance for these older people. Do they consider themselves to be imbalanced or unbalanced if so in what properties? What is the impact on their well-being?

My own perspective and preconceptions could be seen as a limitation, although within grounded theory, the line by line coding and constant comparison means that it is the data which is primarily the focus of the research. I have acknowledged, throughout, my perspective and professional background, and that the term 'occupational balance' is long established within my profession. I have explained, however that frequently it is seen purely in terms of amount of time divided between certain categories of occupation, for example work, leisure and self-care. Whilst there are those within my profession who have considered occupational balance as also including meaning, when it comes to research and measurement, most researchers revert to looking at categories of occupation arising from our profession's theoretical basis. In this study, I have not done this. I have used the diarists' words to describe their activities as much as possible during the coding stage, and feel that the resulting themes and then properties of occupational balance for older people derived from the research have not been disproportionately influenced by my professional background. The process of grounded theory, with the line-by-line coding, using actions codes (gerunds), 'reduces the likelihood that researchers merely superimpose their preconceived notions on the data' (Charmaz, 2014, p. 125). My research supervisors have reviewed my analysis to ensure that I have stayed true to the data.

## Conclusion

This chapter has considered the methodology and methods within this study and explained how Constructivist Grounded Theory was the best fit. A discussion ensued regarding the choice of data collection tool to support this. The data analysis procedures were explained, and the ethical considerations reviewed. Finally, some limitations were discussed in relation to the study design and researcher perspective. The following chapters focus on the findings of the research study

## Chapter 4: Findings linked to Occupational Performance (OP) and Environment (E).

### Introduction

Chapters four and five lay out *my* interpretation and analysis of the data provided by the diarists, as is congruent with a constructivist grounded theory approach to working with raw data. The themes and concepts emerging are fully examined and interpreted, using the diarists' own words wherever possible.

This investigation of occupational balance in later life has led to a conceptual model, which then facilitates discussion of the interconnectedness of the developing themes with each other at a more theoretical level, over the following two chapters, with the importance to occupational therapy practice and further research explored in chapter six.

The findings are divided into two chapters following the structure afforded by an organising framework used within occupational therapy education. This structure enables a focus on occupation whilst still recognising the crucial importance of the personal and environmental factors which influence performance, levels of participation and well-being (Bass, Baum and Christiansen, 2015), when looking at what people engage in within their everyday lives. This is the concept of 'PEOP' meaning that a person's engagement in occupation requires the interaction of the person (P), the environment (E), and the demands of the occupation in the actual performance of that occupation (OP). All occupational therapy practice models are based upon this central concept and there is now a practice model called the PEOP model (Bass, Baum and Christiansen, 2015). Figure 7 below is a simple illustration of the complex parts required to enable participation in even the simplest of occupations. Take, for example, cleaning teeth. How often, for how long, using what type of tooth brush and toothpaste, using what arm movement and hand grip, using what amount of pressure on the teeth, in what sort of overall body position, at what sort of sink – if at a sink at all, with the water running or not, alone or in company, along with a myriad of other personal and environmental factors will impact upon the performance of teeth cleaning activity, which has a reasonably clear set of activity demands. The more complex the activity the more factors there may be to consider, but they will intersect at the midpoint to become occupational performance. All three elements must be present to bring about occupational performance, i.e. no occupation occurs in a vacuum; occupations are human doing so there needs to be a person engaging; and there are a set of requirements, or role expectations, for any occupation.

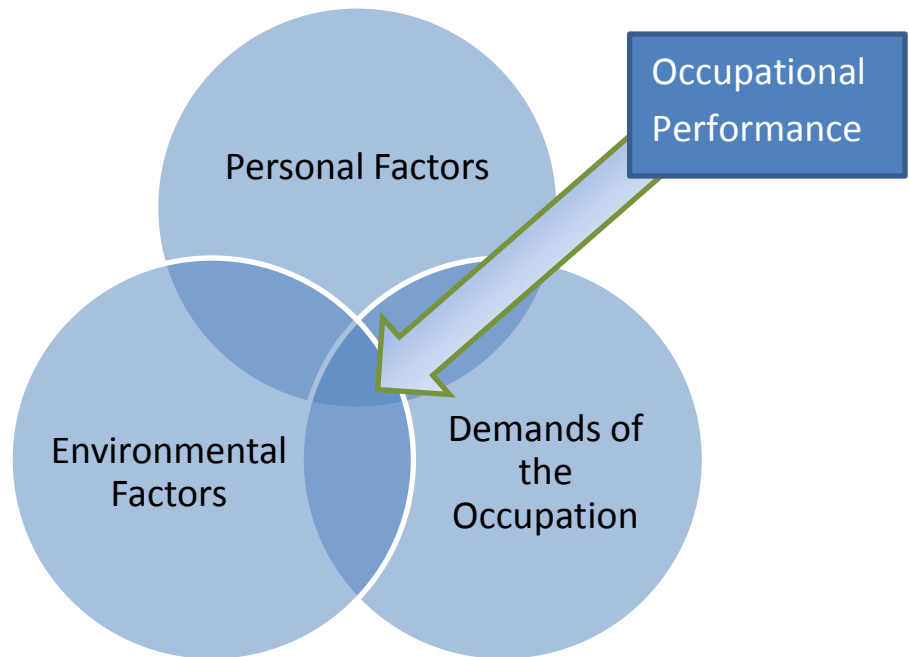


Figure 7: Diagrammatic representation of the factors necessary for occupational performance

This understanding of how occupational performance is produced is fundamental to me as an occupational therapist and educator, and afforded me a clear way to organise the minutia of the analysis in a logical order for dissemination. Due to the data gathered and the research questions around which it was focussed, however, it felt more logical to discuss the themes in the order of those related to occupational performance, followed by environment/context in chapter four; and then consider personal intrinsic factors related to engagement in chapter five.

To begin, the contextual attributes of the diarists will be considered.

## Contextual Attributes of the Diarists

There were fourteen diarists, eleven of whom completed 14 days of diary sheets and in-depth sheets and three of whom completed 7 days of the study. The diarists' ages ranged from 60 to 94, with seven in the 60-69 age range and seven in the 70+ age range. In total 175 diary sheets and 156 in-depth reflective sheets were completed, giving 331 documents for analysis.

Below, table 4 illustrates the basic demographic and occupational history information of the participants in the study.

Diarist	Age	Gender	Living Alone (LA)/ with Partner (WP)	Work Before Retirement	Activities continued post- retirement
1	66	M	WP	Lecturer	Gardening; playing guitar; cycling
2	75	F	LA	Teacher	Keep fit; Gardening; Church; WI
3	70	F	LA	Librarian	Gardening; Reading; Walking
5	71	M	WP	Clerical	Skittles; Bowls; Gardening
6	61	F	WP	Civil Servant	Walking; Reading; Badminton; puzzles
7	76	M	LA	Driving Instructor	Restoring old cars and bikes; going to a club for widowers
8	68	F	WP	Teacher	Church activities; cooking; reading; shopping
9	60	F	LA	Teacher	Reading; Cinema; Theatre; walking; cooking
11	71	F	LA	Teacher	Social History Research; digital photograph; walking; gardening
12	76	M	WP	Civil Servant	Cycling; walking; playing darts
13	66	F	WP	Meals on Wheels Delivery	Walking; Cycling
14	64	F	WP	Health Visitor and Psychotherapist	Gym; cinema; reading; gardening
15	94	F	LA	Clerical	Theatre; eating out with friends; reading; crosswords
17	63	F	LA	Lecturer and Activist	Socialising with friends; writing; fundraising for charities

Table 4: Contextual attributes of the diarists

Of the fourteen diarists, ten were women and four were men. Seven were living with a partner, with the other seven living alone. The diarists provided information regarding their work prior to retirement and, whilst varied, this was predominately 'white collar' work e.g. teacher, clerical work, civil servant, librarian, with one exception who had been a driver all his working life. One other participant who had to pull out due to illness was a manual worker. It is interesting to note the type of previous work history of people drawn to this type of study, as discussed when considering limitations of the study and future research needs.

The inclusion criteria for the study states that participants needed to:

- Have retired from their job/career (this does not mean they cannot be engaging in paid or unpaid work but have retired and are eligible to receive a pension)
- Consider themselves to be independent in their daily life activities

As part of their day to day lives several of the diarists continue to engage in paid employment to supplement their pensions, either in a similar field to their pre-retirement work or in different areas, as well as voluntary work in varied forms. They have also continued to engage in a variety of activities that they enjoyed pre-retirement such as gardening, keep fit, reading, walking, going to church, cycling, dancing and sports. All the diarists mention driving a car but also used public transport, walk and cycle to get about their local community and further afield.

Six themes emerged from the data and will be discussed in the following order. The six themes will be explored in detail with examples drawn from across the full range of data sources, both reflective diary sheets and the in-depth sheets. Whilst they are discussed separately and divided into sections in the following two chapters for clarity, there is a great deal of interlinking and overlap between the themes, so much so that they could be considered a gestalt in terms of the need to be viewed as a 'whole' to fully see all the interconnections. Stepping back to look at the panorama produced by the detailed review of the data is what enabled the properties of occupational balance to be presented as a concept model; and the factors influencing this, and its impact on the participants lives discussed in Chapter 6.

The first two themes, **Social Participation and Sociability** and **Elements of Doing** are related directly to engagement in occupations, so are within the province of Occupational Performance (OP). The third theme, **Contexts for Doing** is clearly around the environmental influences on engagement, the of E of PEOP. These are the three themes which will be discussed within the first findings chapter – Chapter Four. The other three themes which are more related to the intrinsic personal factors (P): Influences on Engagement in Doing; Elements of Planning, Pacing, and Pausing; and Continuity and Belonging will all be discussed in Chapter Five. Firstly, then, the theme Social Participation and Sociability, and its related sub-themes will be discussed.



## Social Participation and Sociability

Within this theme, there are four areas to be discussed in some detail. The first of these is captured within the main theme itself, *Social Participation and Sociability*, the third is a sub-theme, *social obligation* and a final subtheme to be explored is *reciprocity*. Figure 8, below, gives a diagram showing how the theme, subthemes and sub-subthemes fit together. It was possible to further represent some of the interlinking between these elements of the analysis, which will be discussed in detail in this section.

In relation to the main theme, I will primarily examine Social Participation as a category of ‘doing’ in some detail, before considering the additional component, Sociability, to fully capture my analytical thought processes around this area of the data. *Social Participation and Sociability*, as emerging in the project, has shown itself to be a key concern within the diarists’ daily lives.

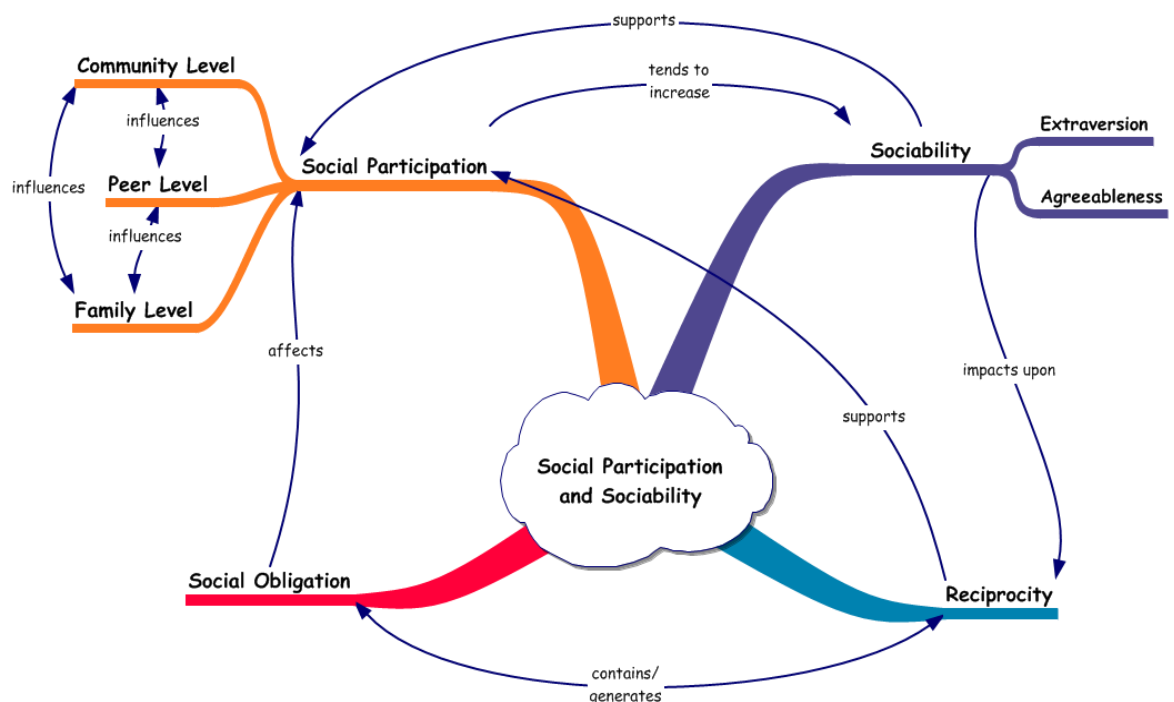


Figure 8: Social Participation and Sociability Theme, showing subthemes and interlinks

The American Occupational Therapy Association (2014) use the term social participation to describe an area of occupation, as they consider that all the broad range of activities or occupations in which people engage can be sorted into eight categories. Along with social participation they identify these categories as: activities of daily living; instrumental activities of daily living; rest and sleep; education; work; play; and leisure (AOTA, 2014). Although this type of categorisation is useful in some ways to help structure assessment and intervention with clients, there is much criticism regarding these, especially the narrower categorisation of work (or productivity), leisure and self-care (see Hammell, 2009b; Pierce, 2001a). The AOTA practice

framework (2014) is one of the few to include a distinct category around occupations engaged in to maintain social roles. The description of this was consonant with the data coming from the diaries and so is used as a starting point for describing the importance of this theme within this research study.

### Social Participation

Social participation as an area of occupation, is defined as organised patterns of behaviour – ‘characteristic and expected of an individual...within a social system’ (Mosey, 1996 cited in AOTA, 2008, p. 633); ‘involvement in a subset of activities that involve social situations with others (Bedell, 2012) and that support social interdependence (Magasi and Hammell, 2004). Social participation can occur in person or through remote technologies such as telephone calls, computer interaction, and video conferencing’ (AOTA, 2014, p. S21) and has 3 levels:

- *Community* – engaging in activities that result in successful interaction at the community level (i.e. neighbourhood, organisations, work, school, church or another spiritual group).
- *Family* – engaging in activities that result in successful interaction in specific and required and/or desired familial roles
- *Peer, friend* – engaging in activities at different levels of intimacy, including engaging in desired sexual activity (AOTA, 2014, p. S21)

### Community Level Social Participation

The examples below show the different types of activities the diarists engaged in to maintain and enhance their social interactions at a community level, ranging from voluntary work – regular and/or sporadic; paid work; taking care of their neighbours and neighbourhood; involvement in ‘communities of interest’; or activities of a social nature which gave them a presence and a sense of belonging within their local area.

Firstly, looking at voluntary activities, several of the diarists engaged in regular voluntary work, for example, diarist 3 had two regular voluntary activities:

working in a charity shop (twice weekly)

- *Help in the local Hospice Charity Shop. Preparing clothes for sale i.e. steam ironing them, putting tickets on them, hanging them in the shop. So normally one morning a week* d3w1r1
- *9-12Charity Shop. Thursday is Hospice shop day, so I can rise a bit later* d3w2s3

and taking books from the library out to housebound older people (twice a fortnight with different runs).

- *8.40 Walk to Outreach Library, [town] ..., to take books to the housebound...This is my most enjoyable task.* d3w1s7
- *9ish Library Run. This one isn't as well organised as the others but the borrowers are pleasant, maybe allowed to choose the books for them Hurrah!* d3w2s4

These were core activities to her and the latter was one of her most enjoyable regular activities, 'This is my favourite voluntary work. Very personal really get to know the borrowers, their interests, families etc.' (d3w1r2). Her involvement in these regular voluntary activities led to other more casual volunteer work, such as:

- *2-4 Visited one of my old ladies and walked her dogs. I am not a dog lover!* d3w2s4

And, also, to other social contact:

- *9.30 Bus to [town], see an old Lady. Visit her once a month aprox, she used to be one of my borrowers. Suffers from agoraphobia so is lonely, appreciates my company.* d3w2s1

Other diarists demonstrated similar mixes of regular and more casual examples of volunteering, for example Diarist 5 regularly (once a month) ran the bar for the Bowls Club, and then also during the diary study he helped at a local Annual Fun Day:

- *10.00 Help setting up coconut shy in R. Park for Annual Fun Day. Sorry I cannot help all day, but hope they do as well as last year, when we ran out of coconuts & made about £150 profit* d5w1s2

Diarist 17 is intending to make a large commitment to community involvement by starting her own charity shop with a friend.

- *9.40 –10.40 Interrupted by visit from a neighbour...She brought donated goods for the charity shop we're going to start, to raise funds for residents at [retirement complex]* d17w1d4
- *11.45– 1.00 Socialised with neighbours. They keep asking me about the charity shop. I can't tell them anything concrete till we can get the contract signed.* d17w1s7

Some of the community level activities the diarists engaged in demonstrated their political and ethical viewpoints, there could be an element of not only wanting to support a cause but of wanting to make a statement regarding what sort of person they were by the types of activities in which they engaged. This relates to the idea of identity being shaped by occupation, and occupational engagement then being viewed as self-expression of that identity to the social environs (Laliberte Rudman and Dennhardt, 2008). See below examples from two of the diarists, but the idea of expressing who you are, or what type of person you are, through what you do is evident in many of the diarists' contributions to the study.

- *9.30 Deliver some Lib Dems leaflets [named] most delivered yesterday. Glad I can help our Councillors [named] & ex Lord Mayor [named]* d5w2s1

- 7.30-9.30 Palestine Solidarity Campaign meeting – talk by speaker [named], followed by discussion. d17w1s5
- 10 -10.40 Phone calls. Also voted for Amnesty International candidates by phone d17w1s7

Regarding neighbours, it is interesting that several diarists spent time with their neighbours but identified them specifically as *neighbours*, rather than as *friends* who lived next door or in the same street. There was a definite difference in how they described their interactions with neighbours to how they described their interactions with friends. Whilst they did have purely sociable exchanges with their neighbours, overall there is more of a ‘duty’ element attached to the interaction with neighbours. Diarist 17’s comment below demonstrates this.

- 5-6.10 Did some gardening odd jobs for neighbours. I don’t like getting saddled with this – but it means a lot to people who are getting frail, to have their garden looking right. (It was mainly just watering & pulling a few weeds.) d17w1s3

This is, perhaps, suggestive of an awareness that people need to get on with each other if they live in the same vicinity.

Diarist 2 regularly spent time with her 94-year-old neighbour, taking her shopping, to the hairdressers, visiting for a chat, to watch TV, or water her garden. Her family did not live in this country, but when they came over they took Diarist 2 out to lunch with them as a token of their appreciation. There was a definite reciprocity element evident to this and many of the neighbour interactions in general, which will be discussed later in this chapter.

- 9.45 [Supermarket]. I always take my neighbour shopping on Friday mornings. (We only go once a week). This usually takes an hour – depending on how many people we see that we know. She likes to go round on her own although she is almost 94. d2w1s4
- 12.45 Went out with neighbour, her daughter & husband...They do appreciate the way I take care of [Neighbour]. d2w1s2

Also returning to the point made previously about expressing who you are through what you do, these activities can also be linked to this. They demonstrated that they cared about other people within their community and social circles, and modelled this behaviour to those around them, see for example Diarist 13’s excerpt below.

- I visit my elderly neighbour in his house. He is 86 and a widower. He is also lonely. I might visit once a fortnight and if he’s in the garden I’ll go and have a chat. I’ve known him for about 20 years and I like to know he’s OK d13w2r4

In relation to their neighbourhoods, all the diarists demonstrated that they were comfortable within their local communities. They have developed successful personas to project when dealing with other people within that community.

- *17.45 drive out for evening walk with local strolling group, 20.30 finish walk, go to village pub (pub just awarded "best in area", so handing out free food to celebrate)*  
d1w1s5
- *Went to [Pub] for dinner. Our meal at the [Pub] was good & it was nice to see the manager, who has been there for years, and always greets one as if he remembers one's face!*  
d14w1s1

There was also a feeling amongst some of the diarists that they needed to protect their local shops and environments, or they would lose them. Again, the support of local shops and businesses could be seen as ethical or political engagement which gave clear indications to those around them of the characteristics, and viewpoints, of the diarists. It was expression of who they were through what they do. This has been called occupational identity by some theorists (Phelan and Kinsella, 2009; Laliberte Rudman and Dennhardt, 2008; Kielhofner, 2008; Unruh, 2004)

- *Nice to contribute to the neighbourhood. Nice Meeting people, seeing them happy when they win and at least giving them exercise*  
d5w1r2
- *Went into Post Office, we must support it as two others in the area have been closed. Feel sorry for people who have to use a bus to get there (I did when couldn't drive after my hip replacements.)*  
d2w1r6

Some of the diarists' community level engagement was linked more to a specific area of interest, which led to volunteer activities or special events to be attended in the area – or both. For example, Diarist 7 had an interest in vintage vehicles and had a special event for old motor cycles coming up at the end of the first week of writing the diary. To prepare for this, he had to get the bike in running order, which involved expense, trips to shops and time. On the day, he was a volunteer to help set up for the event. Interestingly, he wanted particularly to share his attendance at this event with me, so completed eight diary sheets in the first batch, to ensure he could do this.

- *0815hr Get vintage m/cycle from garage (all ok) and set off...Arrive to give help with set up – (100 bike stands) ready for 10am start of cavalcade*  
d7w1s8

Diarist 8 was a retired teacher and still retained a role in local schools taking Easter assemblies; she was also called upon for one off 'fun' events such as the dancing competition mentioned below. Her community level participation had strong continuity with her pre-retirement activities, so was congruent with her occupational identity, as constructed over her many years working as a teacher.

- *1.00 Went to [School] to judge dancing competition for whole school. Brilliant atmosphere each class took part in the competition – so hot in the hall. Almost in tears watching two reception Down's Syndrome children dancing – wonderful.*  
d8w1s4

### *Family Level Social Participation*

The activities that the diarists engaged in to maintain their positions within their families varied greatly in type and intensity. It was clear to see, however, that maintaining contact and a place in the family hierarchy was important to all the diarists who had family alive. It was also interesting to note that those without family close by, developed some close friendships which seemed to provide them with some of the close ties usually existing within a family circle. It did not matter whether diarists had a partner or not in terms of how close they were to other family – it was more about geographical closeness and in some cases, how well they get on with the other significant people in their relatives' lives. Within the diaries, it was particularly important for those who were mothers or fathers that they maintained regular contact with their children and grandchildren, and engaged in activities to enable this.

Diarist 1 and 5 articulated their continued contact with their family much more in terms of direct actions, such as provided the clarinet or looking for French books. Whereas Diarist 2 and 14 expressed their relationships with their adult children in terms of the worry caused by these children and support that they provided to them. This does seem to be a gender spilt in approach, Diarists 1 and 5 being male and 2 and 14 being female.

- *21.30 long phone call from son, news of grand-daughter and his new flat, back to computer to check out possible sources of children's books in French.* d1w1d2
- *8.00 Ring Daughter. It's her Birthday – gave her a clarinet as she used to be able to play – hope she likes it* d5w1s2
- *6.30...Had a terrible night... Awake more than asleep... Worried about my son's future, he is going through a divorce, trying to sell his house and now that his job will be coming to an end with the Government's cuts. Mothers never stop worrying about their children.* d2w1s7
- *1.30 Spent an hour on the phone talking to my daughter. Feel concerned about her as I know she's under a lot of pressure with her work. I also have concerns about her relationship with her B/Friend but my role is to support her* d14w2s1

Those with a partner had the closest level of family social participation in that they lived with part of their family, and frequently engaged in different types of occupations together. This was obviously more so when both partners were retired. There was a feeling of companionship in many of the diarists' description of their daily patterns when living with someone. They planned and went on outings together; they played; looked forward to holidays; looked after grandchildren together; and other enjoyable activities. They also wrote about engaging in mundane activities such as preparing food, doing housework or just being in the same room, but not actually doing anything together, in a way that suggested that this was pleasurable and comfortable. Some examples below demonstrate this integrated, sharing of occupation

- *15.00 meet partner, go for restorative juice, stroll around market, brief visit to photo exhibition, get driven home.* d1w1s2
- *9.00 Games on computer. Something we can do together* d5w1s1

- *5.45pm cooked our meal, salmon, new potatoes & veg ate it while listening to cricket on the radio. We both enjoy cricket & this is a 20/20 match, England v's Pakistan being played in Dubai because of security problems in Pakistan.* d13w2s2
- *18.00 watch partner clean cuttlefish for dinner, chop onions, peppers, mushrooms* d1w1s2

Only one of the diarists acknowledged the frustrations that can arise when living with a partner, especially if one or both are not working full time. She wrote candidly regarding her irritation and frustration from the first day of writing her diary, and she also seemed to dislike giving him reasons to be upset or annoyed with her.

- *9.40...Received text from [Husband] know he's annoyed as I've arranged for [Contractor] to clean the gutters & he's just turn up without notice. Irritated as I know [Husband] will be annoyed!* d14w1s1

It was interesting that despite the obvious irritation she experienced, her diary was full of reference to spending time with her husband. She had retained a lot of work activity in her occupational pattern, taking up a considerable amount of her time and energy. It seems that her husband had to compete with her work commitment for attention.

- *9.10 Breakfast on my own. Good to be having time & space on my own. Realise how I can get irritated when I'm interrupted by [Husband], especially when I'm trying to read for work* d14w2s2

Her objections were not, it appears, to his presence but to his demands on her attention when she had other things in her life; and to having to care for him when he was unwell, which she really disliked.

- *11.30 Arrived home – put washing into machine – chatted to [Husband] or should I say – listened to [Husband] – he likes to do the talking.* d14w1s3
- *11.30 Home – chatted with [husband]. Feeling restless. Hate being a carer & that awful feeling of being trapped. I know that sounds selfish* d14w1s6
- *9pm [Husband]'s eye drops. Beginning to get irritated as he regresses to a little boy & wants looking after. Wants me to put his eye patch on for the night, refused, he is capable of doing this himself* d14w1s6

Similarly, only one diarist commented upon the more intimate activities in which partners engage.

- *21.00 kissing and cuddling on the sofa, early to bed, and sex how confessional do you expect us to be?* d1w1s1

This diarist completed an in-depth reflective sheet on making love. For diarist 1, it seems that sex had more importance because he was in a new relationship and equated acts of physical affection with 'bedding-in' the relationship. There also seems to be some pride in being sexually active in a new relationship in his sixties, and sharing this in the diary is one way of proclaiming this.

- *Making love: Cuddling, kissing, stroking, intercourse...With my co-habitee, on the sofa downstairs, up the stairs, on the bed... Cuddling every morning and night and in between times too; intercourse not regularly, but often (once, twice or three times a*

*week). We are both widowed, cared for ailing spouses as they were dying, and consider ourselves amazingly lucky to have found this new relationship. Demonstrations of affection at all levels seem to me crucial to affirm this relationship. With my wife, time and familiarity dulled the appetite, and her long illness ruled out a lot of our physical love. I am starting again as if I were young again, and I hope to stay that way...It is an important part of our relationship, and I think about it a lot of the time... We enjoyed it. It might have been better if I could have managed a complete second time, but for two sexagenarians, it was probably as good as it can get*

d1w1r2

I doubt that this was the only diarist engaging in sex. Although that could be the case, it is more likely that the others were unwilling to discuss this part of their daily/weekly pattern of activities, in the same way they did not mention going to the toilet' unless this had a special significance. As mentioned above, it did have such a significance for Diarist 1.

Diarist 1 frequently made comments directly to me as the reader, as can be noted in the excerpt below and the one above (d1w1s1). Other diarists' share this trait as mentioned in chapter 2.

- *08.15 get up, go to fetch tea and juice for [partner]. She joins me to suggest a pre-breakfast on toast, peanut butter and avocado; then we go back to bed. For obvious reasons.*

d1w1s6

When it came to relationships with the older generations of family, there was more of an element of caring involved in the relationship, often tinged with worry. Bearing in mind the age range of the diarists, the older generation was likely to be anywhere between 78-100 years old and some were either very frail, or had illnesses which concerned the diarists.

- *8.15am Rang Aunty... – arranged to see her later in the week. Worried about [Aunt], [Uncle]'s dementia getting much worse & [Aunt] feeling v. Low and isolated. Wish I lived nearer & could do more*

d6w1s1

There was a sense of pride and a respect for how well some of the older generation were doing:

- *Read a book (American detective novel, quite good) and exchange texts with my mother. My sister insisted she have a mobile phone, and got her to learn to text. She enjoys it, and texts frequently.*

d1w2s5

Alongside this, however, there was a feeling that they needed to be looked after in some diarists' entries. Along with some frustration at their determination to live as they chose and had an assumption that family would assist (see Diarist 17's comment about being taken for granted):

- *Visit & shop for mother. I usually visit 3 times a week... Twice a week we have lunch this makes sure she eats on these days. How well she has coped (she is 93) since father died. Wish she would have improvements to her house & wish she would have a hearing aid to improve her life...She could have a better life if she was not so stubborn*
- *7.45 -8.15 Visited my uncle. Was a bit annoyed with him, suggested he sometimes takes me for granted a bit. But he just got defensive, and I gave up. (He is nearly 90, and I should accept him as he is.)*

d5w1r5

d17w1s7



Interaction with more distant or estranged relatives had a lot more in common with peer level social participation, in terms of polite telephone calls and arranged meetings on an irregular basis, backed by cards at Christmas and at birthdays.

- *1.15 Phone. My brother rang to tell me about his holiday – he and his wife have been to [Seaside]. Although they live locally they are a close family (they still have 2 adult children living at home) and I feel I can never be close to them. They would never volunteer to help me and I always would hesitate before asking for their assistance. We don't quarrel but...* d2w1s6
- *12.15 Caught bus into town. Had a wander around before meeting my 3 cousins at 1.30pm, had free fish & chips lunch in BHS courtesy of vouchers we'd collected on previous get together. Caught up on news. Great to see my cousins and catch up on their news* d6w1s1

One last point to consider is the role of family pets and how they featured in the diarists' weekly patterns. Certainly, there was regular mention of the need to feed, empty cat litter and so on, but there was not much said about the motivation for this. Only a few of the diarists had pets, and all were cats. Diarist 9 mentioned her cat frequently and employed a 'cat sitter' if she was going to be away from home for more than 36hrs. She possibly sums up the role of the pets in her comment below about him being part of the family and in the way that she describes her weekly pattern with him in it. There were special trips made with the cat in mind but more often he was just part of her daily routine:

- *I do long short trips to see friends + stay in various places – I don't want to give that up – but cat is very important to me + rather dependent! He is my responsibility + my family really!* d9w1r7
- *10.00 Lured cat into basket + walked round corner to vet for annual check-up. Horrified to discover he has a tapeworm – how where from? He's never had one before in 12 yrs. £51 later, we emerge having covered all possible problems. I hope he will be more comfortable + less fidgety. 11.00 Home for a well-earned coffee for me + sleep for cat.* d9w2s2
- *8.00 Watched TV with glass of wine & the cat* d9w1s6

The same regular inclusion of pet care and interaction within her daily routine was apparent in Diarist 3's entries, but she also noted a sadness that the cat was not as sociable anymore (it was very old). She was delighted on the few occasions when it did interact and keep her company as it obviously had done previously.

- *1.30 Gardening, reading. My cat stays in the kitchen and doesn't keep me company like she used to. Alas* d3w1s2
- *3pm Read in the garden. Too hot! The cat sat on my lap. A great joy* d3w1s3

Diarist 8 was kitten sitting and this gave her and her husband a great deal of interest and enjoyment. The kitten was mentioned in several diary entries and they obviously missed it when it went home. They behaved very responsibly towards its care as well; not liking to leave it on its own; not leaving windows open in case it escaped and so forth. This was possibly for twofold

purposes – firstly, they were very fond of it and secondly, they were looking after it for their daughter, and so strengthening their familial roles by doing so

- *8.10 Breakfast. Daughter arrived with kitten on her way to work. Husband played with kitten and stayed with him for me to go to the Mall. Lovely to see the little kitten! Just like having a baby in the house having this kitten!* d8w2s2

Finally, of note, Diarist 13 had two cats of which she is obviously fond, however she did not write about them often in her diary, except when an unusual event happened. They are, however, part of the pattern of daily life and their return in the excerpt below signals a return to normality after chaos.

- *8.30 The men arrived 3 today. The peace is shattered as they are using power tools. Our two cats are traumatised. They don't like strangers at the best of times and with the noise as well, they've scarpered... 5.00 pm prepared and cooked vegetables and the pie and had our evening meal... Washed the dishes and by now I'm really tired. Our cats have come back. Glad that peace has been restored.* d13w1s3

She lives with her husband who was first up in the mornings and made breakfast and possibly took on the role of feeding the cats, which might be why she did not mention them regularly. It did, however, suggest that those who live alone may have a closer bond with their pets, seeing them very much as part of the family, and that those living with a partner do not invest so much in this bond – or consider it in a less focussed way.

### *Peer Level Social Participation*

In terms of activities engaged in to maintain peer relationships and friendships, there were several types and intensities, ranging from informal popping in for a chat and a cup of tea, writing letters, cards and emails to those further afield, arranging days out together, through to planning to visit friends abroad.

- *10am Checked emails and sent emails to old work friends to say I couldn't make either of the last 2 planned gettogethers due to prior arrangements & my failure to transfer from calendar to diary. Emailed old college friend to check arrangements for trip to France in September.* d6w1s1
- *10.15 Walked into town for Lit Fest event. friend reading '100 women Read' at [Town Hall] so supporting her – but stayed an hour listening to huge variety of 3 minute excerpts.* d9w2s4
- *6.45 Am going to [welsh town] market with 3 people who don't know each other, only me. Worry whether they'll get on...Meet [friends] at [train station] ... Went to market & had lunch...Arrived back in [city]...All agreed they liked each and enjoyed the day. What a relief!* d3w1s1

For those diarists without partners or family close by, some friends took on a more important role – see for example Diarist 9's comment regarding her close friend below.

- *4.30 Ran a bath – spoke to [old friend] while in bath soaking...we talk weekly for about an hour. Friends since we were 11 – I guess we're more like sisters – I sometimes wonder what we talk about for so long – but it's no struggle – I like to think I can help her + she confides in me more than anyone else – We're both divorced only – and, with no parents living – and are each other's family really. Altho' I like my independence + she doesn't like it on her own.* d9w1s6

There was also a sense in some of the diaries that people had different social groups with whom they engaged in specific activities. Often these groupings were quite exclusive and there was little crossover of these friendships into other areas of the diarists' lives.

- *8.45am Went to local Sports Centre for over 50's badminton session. 9.00 am – 12 midday. Had some really good games and a good laugh with badminton 'pals'.* d6w2s3
- *9.45 [WI friend] arrives to take me to O... Treasures, [City]. Three of us travelled in one car and met up with 9 other members of our WI at [City]. This was our summer trip.* d2w2s3

Where there was any cross over, the demarcation of different friendship groups was still clear, see Diarist 2's comment below about her 'friends from Keep Fit'. Whilst they were engaging in a non-keep fit activity, she kept the tag of 'keep fit' clear in her mind by referring to them as such. Interestingly she was mixing her social networks slightly here as she took her neighbour with her.

- *7.00 Local Drama Production visit – Life of Gershwin. Looking forward to visit tonight. Will take my neighbour but will see friends from Keep Fit there. One of our members has actually written the story and is producing it* d2w1s5
- *I sat with friends from Keep Fit as we had made a block booking, however two of our members were disappointed they didn't have seats with us.* d2w1r5

Some of these specific friendships did have the potential to blossom further into more 'universal' friendships, see diarist nine's comment below, however this seemed to require some extra effort on the part of either the diarist or the other group member for it to go further.

- *The walking group has become an important part of my week – socially + physically – it also gives my week a framework. Altho' I don't see any of the walkers except walking, I do feel the potential for at least two stronger friendships – if I want to develop them.* d9w2r4

There were also activities engaged in from a sense of obligation which were done for the friend's sake, despite leaving the diarist feeling uncomfortable or inconvenienced. This relates to another sub-theme of this section – Social Obligation – and is discussed under that heading, below. It was where there was a strong sense of 'duty' but also was about treating people as they would like to be treated.

As shown in the examples above, the types of activities that people engaged in to maintain their roles were many and varied, and then required other activities to support them. For example, Diarist 1 needed to source French children's books to support his interactions with his son and

grandchildren; Diarist 2 regularly made and sent cards to her grandchildren; considered business opportunities for her son; and looked over paperwork so that she could offer him advice. She also had to prepare for her grandchildren coming to stay, and then put her house back to normal when they had left. Diarist 6 and her husband regularly offered childcare to their son, looking after their granddaughter, and were careful to maintain an uneasy truce with his partner. There are examples of how the need to engage in social participation and maintain roles is a motivator, as well as an area of occupation, in all the diaries. It demonstrated a core importance to the diarists in terms of the activities in which they engage, and as a driving force to how they organised the patterns of their daily living experiences. As the themes are discussed and the full, rich picture of the diarists' occupational lives emerge this will become increasingly evident. It is not possible to explore any part of their experiences without considering social participation and sociability on some level in relation to that experience.

The reflection on Social Participation as being more than an area of occupation suggests that the definition of it by the AOTA (2014) may need reconsideration. In this study, it had a central importance to all the diarists' lives and was more than just the 'doing'. Being, becoming and belonging (Wilcock, 2007) are also evident. Social Participation activity is about *being* a certain person, living a certain socially connected lifestyle within a certain culture, aspiring to *become*, progress and improve, and to preserve their connections, health and participation through choices in doing. The *belonging* element is visible in the need to belong to different levels of social groups - choosing activities to ensure that these valued associations are nurtured, and continued. Acknowledging the central role of Social Participation and that there was 'more to it', led to the addition of the term sociability, the reasoning for this and how it was demonstrated within the diaries is outlined below.

### Sociability

Sociability is conjoined with social participation as a theme because it is the attribute/ability to interact well with others – the skill, tendency or property of being sociable or social. Diarists alluded to this ability when discussing and describing their relationships and interactions with other people. They actively engaged in the use of this skill to maintain their social participation at all levels. Cohen *et al.* (2003) suggest that sociability is a determinant of the quality and quantity of social interactions and plays a role in the development and maintenance of social networks, intimate relationships and social supports. Furthermore, they suggest that it has two central components – extraversion [the personality dimension which reflects an individual's preferences for social settings] and agreeableness [the dimension of personality that underlies geniality] (Cohen *et al.*, 2003). Social Participation and Sociability are therefore synergistic in their relationship in that sociability supports social participation and engagement in social participation could increase sociability. See figure 8 (p. 104) for a diagrammatic interpretation of the

relationships between the themes of all levels in this area. I would suggest that sociability affected engagement in occupations across all three levels of social participation, but possibly more particularly at peer and community level. Although there was some evidence of strained or distant familial relationships, overall, at a family level, especially with partners, relationships were comfortable with reduced need to be extravert, or work on skills related to sociability to the same level as with those with less intimate connections.

The diarists demonstrated that they understand the importance of sociability, as a skill, and being open to social encounters, to ensure their social participation was at a satisfactory level to them. As an example, throughout her diary entries, Diarist 17 demonstrated high levels of both suggested components of sociability, and even on days where she was working on solo projects she was still aware of those around her and interacted with those in her social environment, so maintaining links.

- *Another day of largely solo activity, though with many bouts of sociability, seeing neighbours, phone calls etc Most of the day was either domestic chores (have to be done) or writing* d17w1r2

Diarist 9 also engaged in many social participation activities at the peer and community level, demonstrating sociability traits, however she recognised that these did not come entirely naturally to her and that she had to work on this. Her comments below perhaps suggesting that she had less of the extraversion personality dimension and her motivation for stepping outside of her comfort zone to engage in these activities was the need for social participation to play a role in her life – perhaps even more important to her as she had no close family.

- *Met 5 friends from work...Train to Paddington, taxi to V+A, visited "Cult of Beauty" special exhibition...First time – I've joined in with one of these occasional, social outings. I probably won't go again...I like going to London, galleries, museum, etc. but I usually go with one friend – not a group. So it's not the activity itself which is different but the company – I always feel happier 1: 1 than in a group. I felt I had to fit in with other's choices... I am by nature more solitary – but feel this is not good for me.* d9w1r4
- *A beautiful sunny day – but chilly = good walking weather for me. I'm comfortable walking/talking with [friend]. A good work – out for lungs + limbs. Stayed for coffee after + chatted to a 'new' walker – who was very nice + enjoying the group. It is good for me to make an effort to talk to different people!* d9w2r1

The next section will discuss the theme of social obligation which was touched upon when discussing peer level social participation above.

## Social Obligation

This is a subtheme ranged under the main theme, as it is linked to social participation, and maintaining valued roles, by following expected social norms of the society in which a person lives. In the diaries it manifested as the diarists' social expectations of self and others when engaging in social participation and sociability. This meant behaving in certain ways to be part of their social networks at all levels, for example visiting people in hospital, making and receiving regular phone calls from family and friends, remembering people's birthdays, paying bills on time, keeping gardens tidy, houses and self clean, and visibly following social norms. This is prevalent in several of the diarist's contributions. There was the sense that these things needed to be done whether they were enjoyable or not, for example when Diarist 2 described her weekly visit to a friend with dementia: '2.30 Arrived at [friend]'s - I dread this visit each week, but feel I must do it...' (d2w2s2). There was a strong sense of duty about these activities and an almost mandatory quality to them. There was empathy on the part of the diarists who visited friends with long term conditions and the feeling that 'it could be me' seemed to add to the obligation felt. Several diarists had friends or family that they visited in this way, and continued to do so even though it was distressing or made them sad, see for example:

- *1.15 Left home...drove to see my friend who has dementia. 2.30 Arrived at [friend]'s. I dread this visit each week, but feel I must do it – after all it could be me. She knows who I am but is unable to contribute very much to the conversations.* d2w2s2
- *1.50 Take bus to see friend in a nursing home. The last two times she has been asleep and didn't want to wake up. This time she just cried out and got quite angry so I left after 10 mins* d3w1s4
- *11.20 visited my friend who is in a nursing home. I only stay for an hour as she is becoming quite confused and conversation is difficult but she still knows me so I try to have a laugh with her...* d13w1s1

There was also a strong sense that the people around them should also adhere to certain standards and annoyance when they did not; as shown in the following examples:

- *Sometimes people can be inconsiderate of others – pushing past etc. I find I have become increasingly intolerant with age and have become a 'grumpy old woman' at times.* d6w1r2
- *I was thinking as much as I like my customers, why don't they fill out their order forms properly. Some never bother with all the details so I have to keep referring to the catalogue.* d13w1r7
- *We will have a water shortage soon, all people should be like us on a water meter so if you use or waste water you pay for it* d5w1s2

## Reciprocity

Reciprocity ties very closely with the theme, social participation and sociability, and the other sub-theme, social obligation. It is noticeable in close interpersonal relationships such as with married partners, but is also mentioned in relation to friends and the wider community. Positive

reciprocity can be seen as glue which binds people into social relationships as a small act of kindness by one person leads to the expectation of the return of the favour, so the interaction will continue. Reciprocity therefore supports ongoing social participation, certainly at peer and family level. Social Obligation and reciprocity are closely linked in that the first act in the reciprocal pairing brings with it the requirement that the favour is returned in some way, see the extract below where a reciprocal pairing is initiated by friends not wanting to take money for driving Diarist 13 to the airport. This sense of obligation imbeds the interactive relationship between neighbours, friends and family in place. People can uncomfortable if they cannot return the favour.

- *7.00 We've got a busy day today. Friends are coming tonight for a meal...these are very good friends. They've offered to take us to Heathrow when we go to Australia in September. They won't accept any money for petrol so I invite them for meals instead.*  
d13w1s2

The following four diary extracts demonstrate this reciprocity in action, where diarists explain both sides of the reciprocation or 'favour' which maintained the harmony of their relationships within their social circles:

- *22.00 back home, snack on Cornish pasties brought back by neighbour from her holiday: a thank you for watering the plants*  
d1w1s5
- *4.30 Blind – bathroom. So pleased to see a neighbour arrive to fix blind I bought some time ago. Some weeks ago he tried to fix it but didn't have the right drill. People in our Close are kind and helpful. [neighbour] is at present working abroad but did this little job for me. I have tried to help his wife and daughter recently when there were hospital problems.*  
d2w2s1
- *3.30 Friend gave me a lift home & came in for a cup of tea.*  
d8w1s4
- *8.20 Hang out Washing, shopping for neighbour & myself...9.30 Neighbour will rub cream as my back still painful.*  
d3w2s5

Having considered this first theme and subthemes in some detail and explained, with reference to the data, why I consider it to be a central theme within the analysis, which links into many of the other themes and sub-themes which will be discussed, I will now move on to consider the theme **Elements of Doing**. Which will reflect upon the data related to the demands of the occupations people engage in and the occupational performance, including some which clearly intersect with the social participation theme discussed above.

## Elements of Doing

This is a large area of the analysis which looks specifically at what people engaged in and some of their thoughts and feeling in relation to that engagement, the 'why' is more prominent in other themes. The subthemes of elements of doing are: Types of Doing; Qualities of Doing; Satisfaction with Doing; Pattern of Doing. These subthemes will be explored in that order. Figure 9 gives the broad picture of this area of the analysis:

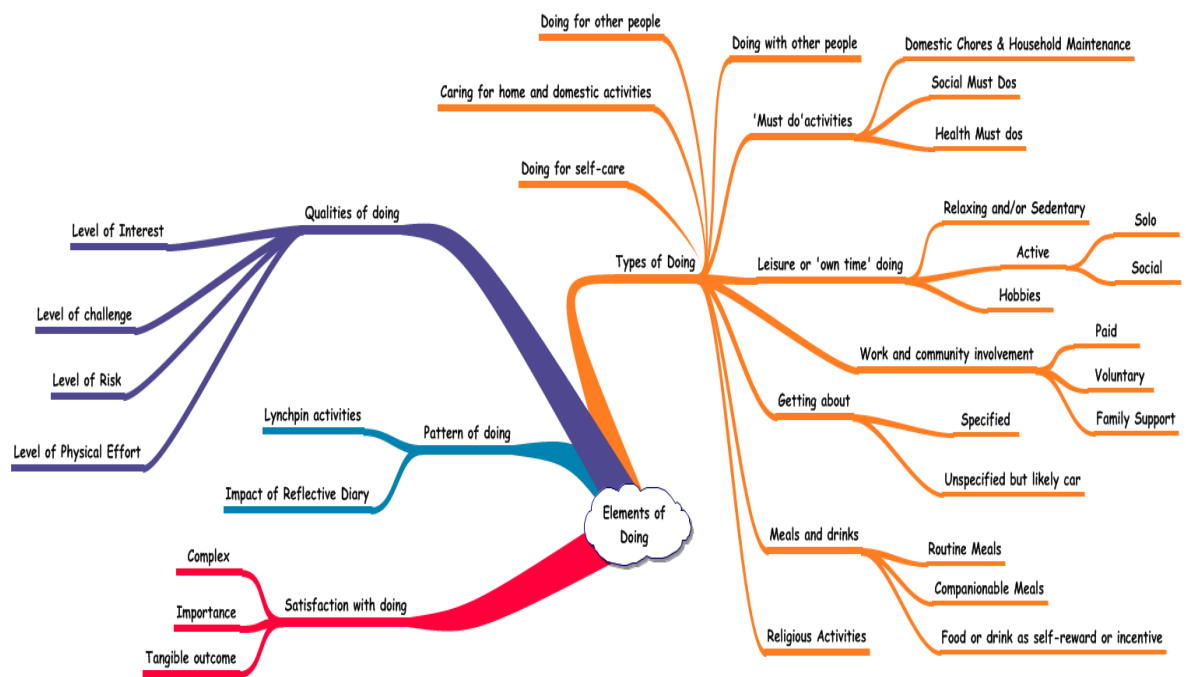


Figure 9: Elements of Doing, displaying all subthemes and sub-subthemes

The subthemes interconnect with each other in specific ways which are difficult to display diagrammatically. They also interconnect with other themes. Some of these interconnections are clear, for example, doing takes place within a context/environment and there is a certain level of planning as an integral component of engaging in a pattern of doing. The previously discussed theme of Social Participation and Sociability, at its simplest level, is a type of doing, and when considered as a more complex construct it is also a motivator for engagement in other types of doing.

Elements of Doing is also closely linked to the more motivational elements of the analysis framework. These directly impact upon engagement in doing, and reciprocally engaging in doing impacts upon both a sense of belonging and continuity and on motivation to continue engagement.



The diarists acknowledged, in different aspects, that their lifestyle and what they chose to engage in directly impacted upon their health. Continued good health was seen by them as vital to their ability to continue to engage in their meaningful activities, so this motivated involvement in several activities which they considered would help maintain their health - both physical and mental. These are captured in 'Health Must Dos' but also in other parts of the analysis, again demonstrating how interconnected the factors involved in choosing and engaging in occupation are. This section will now move on to the consideration of each subtheme.

### Types of Doing

There are many different typologies used within the field of occupational therapy and of occupational science to categorise types of doing, many of which were discussed in chapter 2. The issues with their use were also discussed. I felt that it could restrict the data analysis to use one of these contested typologies and would not be in keeping with a constructivist grounded theory approach. Therefore, starting with the data, and working out from that, nine **types of doing** emerged within this subtheme. In some ways, the exact types of activities, *per se*, are not of paramount importance when looking at what constitutes occupational balance for older people. As noted in discussion in chapter 2, seeing occupational balance as a balance between different categories of occupation across time has limitations, not least the interpretation of the categories if imposed on the data from previous theory (Pierce 2001b). The other issue which arose as the analysis continued was that defining the type of doing was not something that the diarists themselves did, beyond considerations of having some things they felt they had to do, other than that, they were more interested in what they were getting from (or giving to, in some cases) their engagement, and how well it fit within their lives. Figure 10 gives a diagrammatic representation of the types of doing categories which came from the data, and a full explanation of that analysis with examples from the diaries is available in Appendix 11.

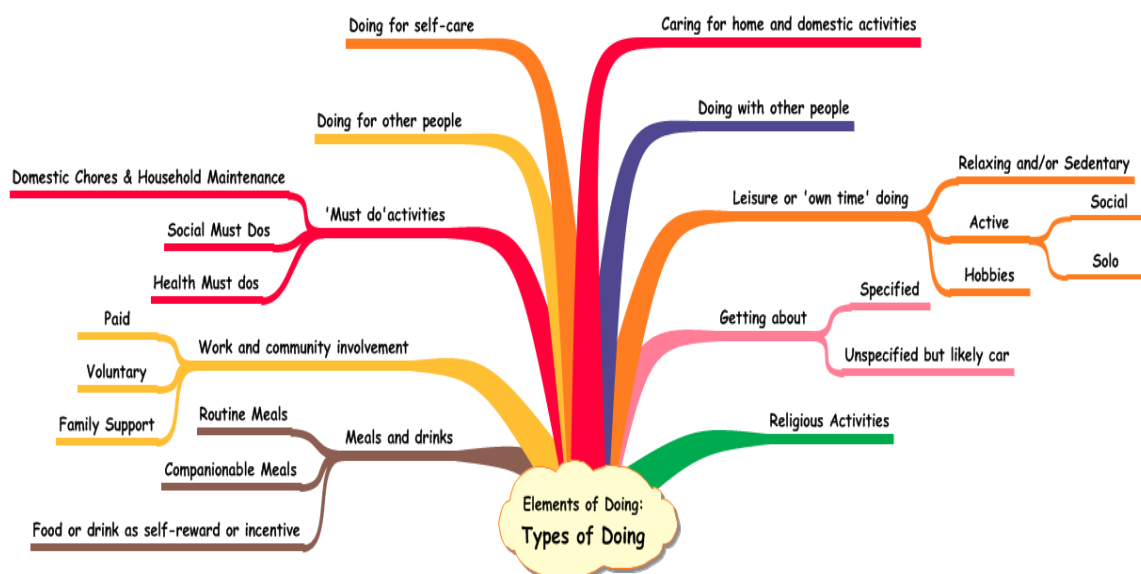


Figure 10: Types of Doing Subtheme, displaying all sub-subthemes and sub-sub-subthemes

Analysing the data to develop an understanding of their individual patterns of activities enabled me to move on to look at the *how* and *why* components of the research questions. This then enabled an exploration of the elements that make up occupational balance for older people, giving consideration for the impact of this on their lives.

No two-people analysing this data would divide the myriad types of doing into the same categories, but this was my interpretation of the data, bearing in mind my background as an occupational therapist. Many of the types of doing overlap with coding in other areas of the analysis, such as social participation discussed above and *elements of planning, pausing and pacing* considered in chapter 5. There is overlap between the different sub-subthemes in types of doing, for example between *caring for home and domestic activities* and *'must do' activities*; between *Leisure or own time doing* and *Doing with others*; between *work and community involvement* and *Doing for other people*. Despite these overlaps, there are different properties captured within these different categories, which helped with the emerging picture of what elements of doing were important to the diarists.

Recording the types of doing in which they engaged as described by the diarists rather than fitting them within the already available typologies helped to maintain integrity with the data, and was more in keeping with a constructivist ideology. As I am not suggesting that occupational balance relates to the amount of time spent in specific types of activity, it is not crucial to include the full analysis in the main text of this thesis, as mentioned above, however, this is available in Appendix 11.

Moving on now to look in more detail at Elements of Doing subthemes: Qualities of doing; Satisfaction with doing; and Pattern of Doing will further enhance the understanding of what was important to the diarists related to the 'bigger picture' of their doing. The first property to consider is contained within the subtheme 'Qualities of Doing'

### Qualities of Doing

The diarists recognised several interlinked qualities to the activities in which they engaged, related to the level of *interest; challenge; risk; and physical effort* involved.

These qualities were influenced by environmental factors, which are considered later in this chapter, but of note, *how often* the task had to be done, so the temporal context had a direct impact, and this was not always acknowledged in relation to appraising the qualities of an occupation. For example, Diarist 1 wrote about gardening: *'There's not really a plan, it's never all finished...that's gardening, I sow seeds, the slugs eat the shoots, and I start again'* (d1w1r1), demonstrating an acknowledgement of the circular and repeating temporal quality of this activity.

Below are some excerpts from the diaries recognising the different aspects of *qualities of doing*, both from a positive and/or negative view point, ranged under the sub-subthemes:

### *Level of Interest*

The excerpts from the diaries below suggest ambivalence in relation to some of the activities that the diarists engaged in. Both Diarists 14 and 9 suggest that going to the gym is not something they wanted to do, however once they were there it became absorbing and even enjoyable. This quality, the ability to become absorbed in physical activity, seemed to almost surprise them when it occurred.

- *10am Arrived at gym did an hour's workout (cardiovascular) Enjoyed gym today, even though Rt side of stomach still painful. Sometimes I find going to gym a chore but I keep going* d14w1s3
- *I never want to go – [Personal Trainer] is new and this is my 3rd time with her – she is very nice – but works me very hard. When I'm there I like it - because it is absorbing and I can't think about anything else!* d9w1r3

Diarist 9 found that her interest in continuing to work was waning due to the working conditions and the lack of positive feedback for her efforts, the things that she enjoyed about the work were being eroded, and she was considering discontinuing the role.

- *It was hot, repetitive and I feel increasingly detached from the job.* d9w1r5
- *The organisation has changed considerably – little time to 'breath' + all standing which tires my back. Awful group of disaffected French teenagers – who displayed little interest, no acknowledgement – not even a thank you! I do hate wearing a costume!* d9w2r3

Diarist 8's comments demonstrate that no one occupational experience is the same as another, so on this particular occasion she was uninterested in shopping, an activity which normally she would love. Something had not gelled in the fit between her, the context and the occupation this time, leaving her unable to fully engage.

- *When I got there, there were so many sales but I honestly couldn't be bothered to look through all the sales stuff except to buy trousers for my dad. I used to love shopping on my own but didn't seem to be the mood today.* d8w2r2

Diarist 17 was undertaking a counselling course as it formed part of her future plans, but she was not finding it very challenging and too 'strung out', although the actual content was interesting.

- *It's fairly easy to fit the course into my life. I wish it were a bit more intensive – less strung out. It's important to mention the course, because it's essential to what I hope to do with my life in the long term. And I find it interesting* d17w1r6

The diarists demonstrated that they could engage in activities which did not particularly excite them prior to and sometimes during engagement, but which were interesting in some way or other, even if there was not an immediate reward from engaging. This ability to look beyond the current experience and see how it fits into a bigger picture, including future plans, may have been

gained through experience. They can persevere with an activity, despite possible 'of the moment' lack of interest, if it will lead to future interest or reward.

### *Level of Challenge*

Level of interest and level of challenge seem to be linked. I suspect that Diarist 17, would have been more effusive in describing her level of interest in the counselling course above, if it was more challenging. The diarists described the level of challenge in different ways, both positively and more negatively. Below, Diarist 1 described the challenge of trying to complete the Sunday Observer Cryptic Crossword. He did this every week, and was a championship standard crossword solver in the past, so it was a very important occupation to him. He did not manage to solve the crossword every week, so the level of challenge was set at a standard which kept him coming back for more. It was not so easy that he completed it straight away, but not so difficult that he had no hope of completing it at all.

- *I enjoy the challenge and the satisfaction of finding the solution...Thinking "this is a pointless occupation, but I enjoy it"* d1w1r8

Diarist 13 described some creative gardening, she was aware that the level of physical challenge would be too much, but problem solved how to achieve the result even if it proved too difficult on her own. Despite being aware that the level of challenge could be too much, she was motivated to continue by the thoughts of new plants, and intended to adapt her approach to achieve her aim.

- *10.00 am it's a lovely day so I'm going to spend some time gardening. I'm redesigning one part by removing some lawn and having a bigger flower border. This is quite hard work and may take a while to do but I love buying plants so this spurs me on. Think I shall have to get [Husband] to help me.* d13w1s3

Diarist 14 described the level of challenge involved in her work, which kept her mind active and used her skill set. She acknowledged that some of the work role was stressful (e.g. marking), but she spent a lot of time preparing for and engaging in work, despite it being part time, suggesting that the challenge level was right for her.

- *I do it because it's a part time job. Its stimulating. Keeps my mind active. Find I am being challenged and an opportunity to meet people. Also using my skills* d14w1r4
- *3pm Returned to the computer, writing comments for the student's essays. Marking essays is not my favourite thing to do – I do not like being critical. I like all the students to get good marks! I find it stressful.* d14w2d1

Diarist 9 described a different sort of stress, brought about when a person's skill set does not fit with the demands of the activity engaged in, making it too challenging.

- *12.00 Respond to request to fill in work sheet for Stretch workshop. It takes me so long to work out how to save + then send on a document – I still get frustrated with my ineptitude.* d9w1s1

As she acknowledged this could lead to frustration, and self-doubt – she was not satisfied that she had eventually completed the task to a reasonable standard, just discouraged that it took her so long.

### *Level of Risk*

The diarists considered risks and how to manage and reduce these throughout their entries.

Contributions from diarists below talk about direct risks to safety, security and health that must be considered when engaging in certain activities. For Diarist 7, the arming of the alarm system (and disturbed sleep from false alarms) and the need to patrol the ‘garden boundary’ because of a break in had become part of his routine. He seemed to be reviving past habits, from his army days, to enable him to do this satisfactorily.

- *22.30hrs Previous shed breakins (locks cut off and hasps cut through) Alarms now installed. 03.00hrs Internal alarm sounded (intruders)? Found to be a wandering cat in the garden* d7w1s1

For Diarist 14, in the first excerpt, this was a temporary situation and normally she would not be considering risk so openly in relation to exercise, she had recently had an operation and had precautions in place. In the second excerpt, she demonstrated consideration of risks when driving, even though frustrated.

- *10.00 Started exercising. First time I've been to the gym for 3 wks. – realise I have little energy. I had a minor op 3 wks. ago on my face and aware that I can only do gently exercise. Feel annoyed as my body will not let me do the things I want to do.* d14w2s1
- *4.15pm Goodbye to [friend] travelled to Bath (50min journey) listened to Ipod/music. Had an energetic day. Felt good. Irritated by drivers going slow, wanted to overtake but unable due to safety issues* d14w1s2

There were frequent acknowledgments of risk in relation to the diarists' health, so being aware that certain activities could aggravate health conditions they already had, such as bad backs; replacement hips; sore knees; sore eyes, see Diarist 9's excerpt below about gardening in pots in her new home, she was aware of the time constraints to her engagement in this due to back pain.

- *Gardening...It is important to me, to have outside space, to make the property look nice + make an improvement...but even after 30 mins my back feels sore, so that was time to stop, disappointing. It makes me sure I was right not to look for a property with a garden. I planted up some new seedlings but I wasn't able to do as much as I hoped due to my back – But it can't be ignored – I need to do a little and often really.* d9w1r2

Diarist 1's excerpt is slightly different in that he was acknowledging that he had the skill but not the strength to continue to play guitar for as long as he would like, but does not suggest there is any injury or illness causing this lack of strength and had been playing the guitar for 50+ years. He continued a solo session until his hands hurt, in the same way as Diarist 9 continued gardening until her back hurt. Other diarists also listened to their body in relation to how much time or how

much intensity they could expend on certain activities, but perhaps did not always get this right in that they waited until the pain began, rather than stopping beforehand.

- *Playing and singing alone...I finger pick: using thumb and two fingers, I can pick out the melody while maintaining the rhythm. This helps me follow the tune with my singing ...making music is central to my life. I may not be very good at it, but making it is important...It is always good until my fingers begin to hurt...I need to harden my fingers more.* d1w1r7

There were also risks to their mental or social health which were considered when they were engaging. For example, Diarist 6 was aware that every activity she engaged in with her daughter-in-law carried the risk of impacting on her ability to spend time with her granddaughter.

- *Now we have an "uneasy truce" with [daughter-in-law] I don't want anything to upset the apple-cart. Worried she would be disgruntled that I didn't reply to her text straight away so sent reply a.s.a.p this morning explaining situation.* d6w1s1
- *4.45pm [daughter-in-law] joined us and I prepared tea. It's very good that [daughter-in-law] will now join us for a meal. I'm very pleased that our relationship has improved over the past months and she is now happy for us to see quite a bit of [granddaughter] & also spend time with us herself.* d6w2s4

Diarist 14 was aware that she was working with people with sometimes quite severe mental health issues, bringing with it a risk to her own mental health when working with them. She ameliorated this risk by finding a therapist to be her therapist, so that she could 'off-load' any distress.

- *I always find seeing clients challenging – it's being with the unknown, not advising – being patient to let them make their own decisions. My 3rd client - aware that I was left with a lot of negative feelings as if I had taken in 'All her shit'...next time I will go out of the building & spend time with a colleague to have an informal chat.* d14w2r6
- *3pm 50min session – saw my Supervisor who supervises supervisors. Good supervision session. Explored my thoughts about my concerns about my supervisee. Found my supervisor so supportive & felt he had lifted a burden from me* d14w2s5

The diarists demonstrated that people are in a constant feedback loop in relation to their occupational engagement, and managing risk is an integral part of this.

### *Level of Physical Effort*

The diarists made it clear throughout their diaries that physical effort was something they considered when engaging in their daily lives. They wanted to demonstrate the things that they did which were still active, possibly to dispel any ideas of them being elderly and frail, but also to show what they were doing to maintain or improve upon their current physical abilities. This is discussed further in the section on *Activities to Counteract Ageing*. The excerpts below are of activities that the diarists considered to be hard work. The first two relate to exercise activities,

- *We are a mixed age/ability group so the standard of games varies. This week I had 3 hard games. I was really glad to have a good work out – now that I am only staying for an hour, I like to play hard games to maximise my exercise.* d6w1r5

- *10.30 Walk down to gym. Very hard work – intensive 1: 1 session with trainer – but I feel it helps + counteracts other physical deficiencies a little bit.* d9w1s3

Diarist 13 demonstrated that she had a strategy in place to make the house decorating task she was undertaking less demanding,

- *10.00am ... did some gardening & decorating till lunch time. We're decorating our dining room so I'm scraping the paper off... this is hard work so I'm doing one wall at a time.* d13w2s1

Diarist 11 did the gardening task all in one day and was then exhausted at the end,

- *10-1 Watered plants, removed potatoes – put planking for raised beds - This is hard work – making a 5' fence from stack of planks retrieved from down the road – realise it will take all day.* d11w1r5

and Diarist 1 used a push along mower, when he could have used an electric or petrol version.

- *Get out the old push along mower... and tho' we have here more grass than I ever owned before, I can keep it reasonably short with the old mower and our newly bought battery strimmer...I do it alone, not regularly, when I can't avoid it, and I keep doing it because I think the exercise probably does me good: I work up a sweat and my heart rate goes up.* d1w2r1

There is a myriad of ways that the level of physical effort can be graded and approached on an individual basis, with different levels of success. How this is achieved is up to that individual, and will be based on past experiences and what they want to get from their current engagement. Some of the diarists integrated and graded physical activity into their daily pattern, like Diarist 1's use of the push mower, others used gyms and other specific exercise routines to ensure they remained active.

The level of interest, challenge, risk and effort involved all impact upon the other main property, which showed itself through the data and is considered as the next sub-theme – *satisfaction with doing*

### Satisfaction with Doing

There is a level of performance self-evaluation in most of the diaries, related to some of their activities. This seems to be the case for activities with greater challenge; physical effort; or risk involved, i.e. more *complexity*. Diarists were more likely to evaluate an activity if it had some *importance* to them. For example, a social event where they did not want to let people down, or a long-standing work or leisure pursuit. The diarists were proud of that engagement and could be disappointed if a specific instance did not go so well. They would acknowledge whether they could do things as well as they used to, and so were aware of the 'fit' between their skills and abilities and the demands of the activity. They often recognised what factors were impeding their ability to perform to the level they would like to. There was also a real sense of satisfaction in



entries where they described tasks that were completed with a *tangible outcome*. Below are some diary excerpts related to these three components of *Satisfaction with Doing: Complexity, Importance* and *Tangible Outcome*. There is some overlap between these and, for some diarists, all three of these factors are significant in rating their satisfaction with their occupational experience.

### *Complexity*

Diarist 1's excerpt revealed several points in relation to the complexity of gardening, around the context; ethical credentials of the activity and tangible outcome produced. The good weather enhanced this occupational experience of gardening for him, he was satisfied with the level of exercise afforded by this engagement and with achieving his aims for this experience. He was also very satisfied with the *tangible outcome* of his efforts – visibly mown lawn and lettuce and peas for lunch.

- *Gardening is central because it is food production, a gesture to self-sufficiency, it is a low-impact activity, and I like to think it keeps me healthy, especially the push-along mower, which is 36 years old and which I recently stripped cleaned and greased again, so it should work for another season. The satisfaction of being out in the sun and getting something done. A lettuce for lunch is good, even better with a Handful of mangetout peas to throw in as well.* d1w1r1

In the first excerpt, Diarist 9 evaluated her performance on a social event, which also involved doing a hill walk. She was satisfied on both counts, she managed to talk to members of the walking group with ease, and completed the walk without discomfort. Having the two measures of success for this event added to the complexity and chances of not managing to achieve her aims, so she was relieved and considered her performance to have been brilliant.

- *I felt very pleased that I managed the hilly parts of the walk without discomfort, especially when I realised it was a "hilly" walk grade 3! Very nice small group – enjoying chat + drink in [Town] afterwards and home by 8.40. Brilliant... it went better than I hoped... The fact that it was a small group made me move round + talk to everyone – which I'm not great at doing. Successful all round.* d9w2r4

In the second excerpt, Diarist 9 discussed the issues she had with listening to the radio, she was no longer able to multi-task, i.e. if she wanted to listen to the radio she had to stop and tune in just to that. Her personal performance skills were such that she could not have the same experience of listening to the radio whilst, perhaps, doing some housework or other activity at the same time, as she did previously.

- *9.45 Listened to a very good book of the week on radio. I find it hard to listen to radio – now, partly concentration- mostly hearing. I have to stop everything and tune in – very frustrating.* d9w2s3

Diarist 12 had to admit defeat, even with bike repair books he was unable to fix his bike and took it into a bike shop. He found this frustrating and had to come to terms with the fact that his



performance skills, cognitive and/or motor-sensory, were not able to meet the challenge presented by the cycle repair.

- *0900. Cycle to bike shop in [town], having trouble with gears... Very frustrating having borrowed two cycle maintenance books from the library without success.* d12w1s1

In both the above cases the complexity meant that the diarists were unable to engage effectively. Likewise, for Diarist 2, but she took a more philosophical viewpoint on this, when comparing her performance level to that of another driver.

- *When you get stuck in traffic you have time to reflect – this morning I had to watch a juggernaut reversing – when I think how easily drivers can do this & what an awful mess I make of getting into small space sometimes. Then I think you can't be good at everything!* d2w1r4

### *Importance*

When something was important to the diarists it seems that they had expectations for how the occupational performance would unfold in each specific temporal context. The Diarists had several regular occupations which were important to them, such as work, voluntary community involvement or leisure pursuits, and there were one-off events which were important in that moment, for example Diarist 7's motor bike show mentioned previously in *Community Level Social Participation*.

There was some anxiety and trepidation about how they were performing and how others would react to their involvement or other factors in the context. As an example, below are all the excerpts from Diarist 5 about playing competitive bowls. It is clear to see the level of importance this sport held for him, how often he played it and how much he also engaged in the social and cultural elements of the activity. The etiquette around the sport seemed important to him, as did the social practices adhered to, such as the home team hosting a social get together of some sort after the match. All this fed into the importance this activity held in his life and therefore the level of satisfaction that he felt in relation to it.

He played bowls as he felt it was appropriate to his age and that his back condition did not impede him too much. He appeared to be quite anxious about his performance skills and not letting down the team, this was more noticeable during the first week of diary entries. By the second week, he seemed more relaxed, although still not always happy with his performance, and was aiming towards winning the cup. He was very proud of the team when they win a match and did use the term 'we' most of the time when discussing the success. He did not name anybody from the team as a friend which seemed to suggest that it is the team environment and playing with them as a unit which is where the satisfaction lies.

#### *Diarist 5 – playing bowls – week 1*

- *1.30 Leave for important CUP BOWLS Match. We won this cup last year, when I was captain, I hope I can play well for our new captain. 5.15 Arrive home after Bowls. We won a close game and I did not let them down* d5w1s3
- *Won Cup Bowls match. Play about 3 time a week. It is the only competitive sport I can play at my age and condition. I was hoping my rink which was the weakest on paper, would not let the team down. We won which was hoped for and planned for. We must improve if we are to win the cup.* d5w1r3
- *2.10 Leave for Bowls. How convenient that Home matches are only 200 yards away. 2.30 Bowls. 4.00 Bowls tea & speeches. I quite miss doing the speeches, but do not miss anything else after not being Captain now. 4.30 Second half of Bowls. 6.00 Socialising after Bowls. How nice our opposition were & how nice that we had a draw on our rink* d5w1s5
- *1.45 Leave for Bowls in [Away Green]. Hope I play better than I have lately. 5.00 Leave Bowls rink for home having had a drink with the hosts, after winning 11-1. We all played well today* d5w1s7

#### *Diarist 5 – playing bowls – week 2*

- *4.15 Roll up (practise on Bowls Green) Not playing well at present, need practise.* d5w2s1
- *2.10 leave for Bowls – Cup match [Away Green]. Back seems OK. Thank goodness. 4.00 Tea half way through match. 5.20 finish game – won by 13. Is 13 enough lead to take to [Rival Team] later in season?* d5w2s3
- *5.50 leave for Bowls Competition (pairs). 8.45 Finish Bowls. Good result Won 31 – 8. 9.15 leave for home after celebratory drink.* d5w2s5
- *1.50 leave for Bowls at [Away Green]. 2.30 Start Game. 5.10 Finish games – Won. How well we did to come back from 3 – 15 down to win 23 – 20. 6.00 leave for home after Sandwiches & Raffle.* d5w2s6

#### *Tangible outcome*

Satisfaction with doing was shown to come, in part, from the end result. Whilst part of the satisfaction would be from the actual experience of the doing, and theorists, such as Pierce (2001a) suggest that the actual experience itself should be the main event, a tangible outcome does add to satisfaction with many activities. The four examples chosen below demonstrate this. For Diarist 17, as a writer, who was paid for doing so, the end result of a nearly completed draft seemed to warrant all the effort it had taken over the day.

- *I was pleased – even somewhat relieved – to have an almost – final draft of an article by the end of the day. The process was maddenly slow & frustrating... activity didn't go as smoothly and swiftly as I always like to imagine it will.* d17w1r9

For Diarist 6, the joint engagement in DIY with her husband seemed to have been successful but was not an area of expertise for either herself or her husband. The lack of faith in her own and her husband's abilities in this field did not lead to a pleasant experience and was not indicative of satisfaction with the shelves put up.

- *2pm Helped [Husband] put up shelves in bedroom. Always dreaded drilling walls – never goes well – glad when it's over. Wish [Husband] liked DIY a bit more or that I was a bit more able. We muddle along but don't do a lot. Would like to make some more improvements & more decorating if we're staying put* d6w1s2

Likewise, Diarist 8 was not happy with the tangible outcome of her baking occupation. Despite being an experience baker, the cakes did not come up to the expected standard. She was, however, satisfied that she now had a full cake tin and did not seem too upset about this – she was experienced and skilled – and could see this as a one-off error, rather than an indication of lack of ability.

- *Made Rock cakes as my cake tin was empty, I bake at least once every week... Have now got a cake tin full of cakes even if they look like biscuits!!!... the Rock cakes didn't turn out as planned!! Think I put in too much sugar.* d8w1r2

Diarist 2 was satisfied with the outcome of her gardening, in that the garden looked good, however the other tangible outcome was an aching back which was not so welcome. This returns to the discussion around level of risk in *Qualities of Doing*, where it could be seen that sometimes the diarists did not listen to their bodies and stop a physical activity before it got to the point of causing them pain.

- *It was very satisfying when most of the garden was looking up to standard once more. It is also good to think I own a garden and although my back ached by the end of the day I am sure the exercise did me good.* d2w2r5

Having considered qualities of occupations and what engenders satisfaction with doing, the analysis changes tack now to consider the final sub-subtheme of **Elements of Doing: Pattern of Doing**. This draws upon the analysis up to this point on types of doing (see Appendix 11) and social participation, as well as further close analysis of the data to develop a sense of the patterns in the diarists' activities of daily life.

### Pattern of Doing

Whilst pattern of doing is a sub-subtheme of Elements of Doing, it is in fact a key factor in understanding occupational balance as a concept, as it provides the temporal structure within which the personal needs and motivational elements can be examined. This is the area of the analysis which demonstrates that the diarists have a pattern or 'plan' to their lives, whether they are fully cognisant of this or not. It has been acknowledged under the previous theme that not only is social participation a large area of occupation for older people, it is also a driver in choice of occupations and therefore of how the pattern of daily life began to show itself for the diarists. It showed itself in the comments they made about how they chose the things they do when. Social participation is not, however, the whole story.

The diarists had a full and varied pattern to their doing which was balanced between different types of activities with different levels of challenge, interest and energy required. They were sometimes satisfied with their engagement in their activities, sometimes frustrated with a particular instance and sometimes questioned their engagement in a particular activity at all, for example Diarist 9's ambivalence over her part time work. As will be explored in detail when discussing the theme 'Planning, Pausing and Pacing', they had regularity to their time use but also spontaneity, which they acknowledged they must make allowances for within their usual balance, if they were not to overdo it – this impacts on their patterns of activity. For example, Diarist 15 commented on the day after a late night and Diarist 9 wrote about having a late start to make up for a poor night's sleep:

- *9am Got up late. Tired after yesterday – but I do love going to the National Theatre, lots of people- a girl playing The Violin and a good production – it's worth getting tired.* d15w1s2
- *8.15 Woke up – got up and made tea + breakfast – fr.salad + yoghurt – fed the cat took tray back to bed – read Sunday paper. I hadn't slept well – so feel justified in late start.* d9w1s1

The diarists made some conscious decisions regarding how their activities were organised, and there was an ebb and flow to the amount of energy required throughout the day and week. As Diarist 9 put it when she had a fairly empty day to fill '*...I do try to organise myself a bit – I like to have something to show for my day.*' (d9w1s1), whereas Diarist 2 decides to use the time more fluidly:

- *8.00 Breakfast. Decided I had no urgent places to visit so would make this an odds and ends day.* d2w2s5

### *Lynch-pin activities*

There was also a recognition from some diarists of the central importance of a particular occupation in which they engaged, in that this give a peg or 'lynch-pin' around which the rest of their time was organised. For Diarist 9, this appeared to be her part-time job and she clearly described how this worked as a lynch-pin.

- *Despite having retired nearly 12 months ago – I am fairly regularly covering this shift on a Wednesday at the [Tourist Centre] in town. Every month I am asked if there are any shifts I would like to cover – so it is optional. I quite like this one – it pegs my week + gives me a fixed point, I like keeping in touch with the business + colleagues and it's just enough for me now – 3hrs of standing and talking.* d9w2r3

This suggests that some of the diarists had an activity which took over the central position that work previously occupied. For others, they had always had a lynch-pin occupation in their lives other than work, and this had continued post-retirement. For Diarist 13, this took the form of another part-time job, which had maintained a set routine of activity, although the suggestion here was that this fitted around the rest of her life, rather than her life fitting around it.

- *As I've been a [company] rep. for years I've got a routine which I fit in with the rest of my life. The [company] involves 2 weeks of activity, giving out the goods to people & collecting in orders then I get a week off from when my order is sent to when it arrives.*  
d13w2r2

For Diarists 2 and 11 their lynch-pin activity is religious observance, see their explanations below.

- *I do try to get to church once a week. There were 20 present this morning – usually we get 12/14. I do feel this gives a focus to my life and helps me to re-charge ready to face the busy way of living which I am fortunate health-wise to be able to do*  
d2w2r1
- *This is a regular point of my week – a constant factor – without this event my week would have no definite beginning – weekends for the most part I have 'off' – no computing /note writing; this I have followed for ever – it gives definition to my week.*  
d11w1r1

The idea of an occupation around which the diarists build the rest of their occupational pattern, is clear to see, and it is clear to see that only certain types of activities, productive or those with central meaning to the person seem to fit this notion.

### *Impact of Reflective Diary*

Interestingly, keeping the reflective diary, itself, seemed to give some of the diarists a tool for examining their pattern of engagement and to consider how satisfactory they found it. It seemed that Diarists 2, 6 and 12 had all reflected with contentment or at least felt grateful that they could continue to engage in a wide and varied pattern of doing.

- *4.20 Wrote diary. Writing this diary makes me appreciate that I have quite a full & busy life with good friends who I see quite regularly.*  
d6w2s3
- *18.30 Whilst [Wife] and [Friend] had a rest and a chat. I wrote up some diary pages. Played some darts, for an hour or so. Today has been very pleasant, like most of our days are really*  
d12w1s3
- *8.00, Report. Sit down at last to write today's report. How fortunate I have so much energy to do so much in a day.*  
d2w2s2

This could have been more strongly felt due to the impact of social ageing, and the suggestion that after retirement older people were not necessarily able to do things they could do before. This would mean that the fear that their current abilities may not last was therefore increased. It could however be that engaging within a process of reflection had enabled the diarists to see the 'bigger picture' of their daily lives, and start to evaluate how well this met their needs, and how well their skills and capacities met the demands of the occupations within the specific environments/ contexts of those occupations. The next section of the analysis will look in detail at the environmental factors of engagement, under the theme **Contexts for Doing**.

## Contexts for Doing

This theme, and sub-themes, describe the extrinsic contexts and environments within which the diarists undertook their doing. It is difficult to view occupations or the people engaging in them, divorced from the environment in which they occur. No occupation occurs in a vacuum, but within an environment of which the person is an integral part, as well as an actor engaging in the occupational performance. The diverse contextual factors developing from the analysis include: finances; weather; being in nature; impact of people on enjoyment and engagement; and temporal considerations.<sup>5</sup> Figure 11 displays the theme, subthemes and sub-subthemes which will be reviewed in this section

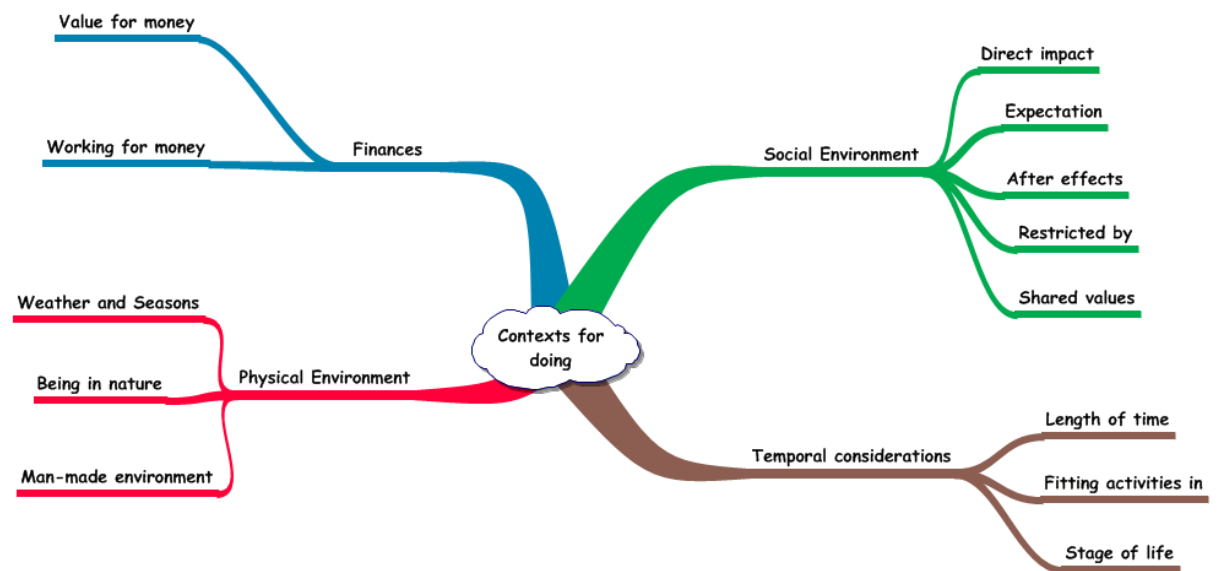


Figure 11: Contexts for Doing, displaying all subthemes and sub-subthemes

These contexts will now be considered, with some examples from the diaries, in the following order: finances; physical environment; social environment; temporal considerations.

### Finances

For some of the diarists, the financial implications of their activities, considering whether the things they engaged in were good value, could impact upon their level of engagement and

<sup>5</sup> To note: There are also environmental factors in the analysis relating to the planning of occupations, these are discussed under the subtheme of Factors Influencing Planning and were identified as the weather, people and resources and are discussed in detail in chapter five.

enjoyment. All the diarists were pensioners, and mentioned needing to be careful with money in passing, for example:

- *Thinking/dreaming of my new lawn but cost will be a deciding factor as the lawn is not a priority. Could think of other things I need with my money* d14w2r3
- *1.40 Arrived at bus station – visiting is not until 2pm so popped into M&S. I love their Per Una range – if only I had the money to indulge myself more often. Then I tell myself I am spending £2000 on the house at present – you can’t have it all ways!* d2w1s5

However, finances were not mentioned directly within their diaries as a restriction to activities they engaged in. It could be argued that the types of older people drawn to a diary study are those from higher socioeconomic levels, hence not having financial constraints to the same level as other retirees. There is research (Bowling and Gabriel, 2007; Bowling and Dieppe, 2005; Gabriel and Bowling, 2004) that shows that pensioners of different socioeconomic statuses have similar levels of life satisfaction, and the ability to engage in a satisfying pattern of activities is not the purely the domain of the well off, so perhaps, unless you are in extreme poverty, older people have developed a satisfactory pattern of activity regardless of financial wherewithal.

#### *Value for money*

These three excerpts demonstrate the way that finance was considered in relation to activity within the diaries. Diarists 2 and 9 were satisfied that the price was right for their activities and they constituted good value for money.

- *Many people like to support such a local event – it keeps drama alive, is a much cheaper night out than visiting professional productions.* d2w1r5
- *City of Bh College, gospel singing workshop 11.00 – 3.30...Altho’ my voice is unreliable due to lack of use – I managed pretty well + we all enjoyed the feeling of singing two completed songs...Rather better than expected in fact – good value at £30.* d9w2r6

Diarist 17, on the other hand, was not impressed with the cost of the train journey, but, nonetheless, enjoyed the experience. The cost had not stopped her from undertaking the journey, but did mar her enjoyment slightly.

- *I don’t enjoy the expense of the train fare – but do quite like getting away from [village] (just for a change) and chilling out on the train* d17w1r4

#### *Working for money*

Some of the diarists who were still working, explained that money is one of the reasons they engaged in this, but not the main reason for any of them. All appreciated the extra money, but for some, the freedom to be able to stop and do without the money is also important. For example, Diarist 9 gave up work, and was clear that the money she received was ‘extra’, so not relied upon.

- *12.00-4.00 Work. My last shift for time being – nice to have the extra money – but I think I’ve had it for now.* d9w1d5

Diarist 17 was in the position of being able to earn money occasionally by writing articles, so could time this to coincide with when she had a need. This was an extrinsic motivation, which allowed her to also demonstrate her competence within her field.

- *In the afternoon, I went back to writing an article. As previously mentioned, I can use words effectively (though writing for publication doesn't come easily), I need a bit of pin money just now* d17w1r9

### Physical Environment

During the writing of these findings, to aid clarity, I have added in some themes which spring from occupational therapy literature, these are Physical Environment and Social Environment (AOTA, 2014). Within Physical Environment there are the sub-themes weather; being in nature; and man-made environment. The sub-themes are directly from the analysis of the data, but I decided that these themes needed to be captured under some umbrella terms to assist the organisation of the data and demonstrate how the subthemes fitted together.

### Weather and Seasons

The weather had an impact on the diarists' willingness to engage in their usual patterns of activity – sunny days and warm evenings led to wanting to do more, starting earlier/staying later. There seemed to be more spontaneity during warm weather:

- *1.00–2.10...Phoned Hannah & suggested walk. Another older resident at [Retirement Complex]. It seemed a shame to be in on such a beautiful day!* d17w1s3

Also, more time spent in the garden, either working in it, or sitting in it. Diarist 14 was working in the garden and enjoying the sun. She also ventured out into a city park considering the differences walking there in different seasons.

- *10.30 Spent time in the garden, doing a general tidy 'up'. Enjoying the warmer weather & the sun. Planning in my mind the plants I will get for the garden* d14w2s3
- *1.40 [husband] & myself went out to park in [city] for 3hrs... Reflected on the park during the winter & compared the scenery* d14w1d3

Diarist 7 used the good weather to assist his efficiency in relation to laundry, and for gardening – he was not so interested in the enjoyment factor and spontaneity was only in relation to practicality.

- *05.30hrs Got up and put washing machine on – ready to hang out on washing line as weather expected to be really hot* d7w1s1
- *1000hrs Garden to be dug over. Mighty hot again, must stop for cool drink* d7w1s2

Diarist 8 was more appreciative of the good weather in relation to sociability and being able to sit and relax with her husband in the warm sun – as a contextual factor, weather can play a large part in making an activity enjoyable.

- *11.30 Returned home and had coffee with my husband - outside in the sun!* d8w1s5



Diarist 11 demonstrated another aspect of the good weather, as a context for spontaneous rest and relaxation, in place of other less attractive activities, several of the diarists mention doing this.

- 1.30-4.30 In garden, weather hot. Sat in deck chair & fell asleep for  $\frac{3}{4}$  hr. d11w1s1

The good weather in general encouraged people to go outside, into gardens and green spaces. The diarists were not an exception. This links into the next sub-theme of *being in nature*, which is an important contextual factor. There is some evidence that being in the natural environment and that sense of connection with nature also adds to the sense of engagement and well-being (see Dustin, Bricker and Schwab, 2010; Maller *et al.*, 2005)

### *Being in nature*

All the diarists commented upon their enjoyment of being outside in the 'natural' world, looking at greenery, birds and animals – whether in the garden, parks or countryside. This context seemed to bring out a reflexive quality in the diarists, and they could become almost poetic in some of their descriptions of the natural world and its impact upon them. Particularly of note, is Diarist 15's comment:

- *I'm so glad that I have a garden – I like to be able to open the patio doors & walk out. Somehow in a garden one is not lonely* d15w1r5

She was the oldest diarist (94) and lived alone but with a fairly busy social life. She did, however, spend a lot of her days on her own and the ability to get out into the garden therefore was very important to her, and she spent time in it and in activities to enhance it – such as trips to the garden centre and engaging a gardener to help her replant parts of it.

Diarist 7, who also lives alone, equally was drawn to the outside space and interacted with the natural environment as well as tending to his garden and his son's chickens.

- *Because of dry weather birds searching for food for fledglings pulling soil onto paths. Robins (very tame eat from my hand) given mealworms. Nature – kind & cruel: Kind – warm & dry, Cruel – little food* d7w1r5

He was philosophical regarding nature and its vagaries, and fed the wild birds when they were unable to get at food themselves.

Diarist 1 was a keen gardener, walker and cyclist and was out in the natural environment frequently during his normal pattern of activities – he appeared to relish this contact, and the produce of the garden, but at the same time respected the other occupants of that environment such as the wasps and bees with whom he was sharing the garden.

- *I may have to stop hacking up and sieving the bank of turves because there seems to be a wasps' nest in it. They don't really bother me there, so I'll leave them. I also had*

*to stop emptying one of the composts because there's a nest of white-tailed bumblebees in it; that I don't mind at all: without bees, I wouldn't get fruit from my trees*  
d1w1r1

Diarist 13 in this excerpt wrote about being out of the garden and in the local countryside on a long walk. She was doing this with her partner and the day was sunny. Several of the diarists either walked or cycled, those who were frailer gained most of their experiences with nature in their gardens. This excerpt showed a strong sense of her appreciation of the natural environment and the enjoyment this afforded her to be able to go out on such a walk. This will add to the expectation that she will have about enjoying it next time.

- *As the day is sunny but with a strong cold wind we go walking instead of biking...I love being outdoors at this time of year. The spring flowers are blooming & the trees are getting their new foliage. I'm a keen bird watcher so there's always something to look out for. When walking the terrain is different from when cycling so you see things from a different perspective.*  
d13w2r1

### *Man-made environment*

Whilst the diarists become quite enthusiastic in their descriptions of the natural environment, overall, their descriptions of the built, man-made environment were not so effusive. There was a more functional appraisal of the space and access requirements, and whether the space met their needs. Diarist 14 was quite clear that the small office does not meet her needs,

- *1.30 Arrived at the office. Small room X5 people, don't like overcrowded rooms*  
d14w1s4

Whilst Diarist 2 felt the scout hut met the needs of the group, for a Women's Institute meeting, which helped the event run smoothly.

- *Twenty-one members arrived. We rent scout hut next to [National] Coach Co. Room is good size and access is good for several of our members who find steps difficult.*  
d2w2r2

Diarist 9 demonstrates another issue of the built environment which causes issues for many, the 'parking in a city' problem. She is delighted that this time she has found a space near her home.

- *12.45 Drove home - found space – unloaded. SO pleased to find a space near house (drawback of city living) Unloading + then putting away shopping my least favourite chore.*  
d9w1s6

The three examples above are typical of how the diarists referred to the built environment, in an appraisal of how it helped or hindered them in engaging in their occupations. There were some occasions where they acknowledged a greater connection with the built environment, either positive or negative, for example, Diarist 9 was happy to be conducting her investment group

business in very plush surroundings, it added another layer of pleasure for her to the social gathering.

- *11.00 Met up with my friends (investment group) and we 6 gathered for coffee in sumptuous room. Loved the comfort + décor of the main hotel, we conducted our business meeting in luxury!* d9w2s5

For Diarist 9, the poor design and age of the hospital building in which she visited a friend added another, negative, dimension to the experience. On top of the sadness of visiting an old friend who had dementia, and was not at all well, the environment was also depressing.

- *Lovely day but so depressing to think I am going to see my friend in the old block of the [Hospital]. No windows to let in daylight, it was fairly cool – fans in operation and fresh air blowing through from a window in the adjoining section.* d2w1r7

The times when the built environment ceased to be just a backdrop or a tool to be used to assist in making an activity run smoothly, seemed to have greater impact on the emotions of the individual and it suggests that this would also be a greater motivation for them to either continue or discontinue an activity.

### Social Environment:

The original heading for this theme was *Impact of people on enjoyment and engagement*. Using the term Social Environment, makes it easier to see the difference between the social context within which occupational engagement occurs and Social Participation which is itself an area occupational engagement. There are the sub-themes of Social Environment: direct impact; expectation; after effects; restricted by; and shared values, these come directly from the analysis of the data.

I've picked out a few excerpts from the diaries which particularly demonstrate the impact that other people had on the diarists' enjoyment and level of engagement in certain activities. This was a large part of the analysis as the people who were part of the backdrop to daily life influenced the quality of occupational engagement in a myriad of ways.

### Direct impact

This was about experiencing people as the social environment and how they directly influenced the quality of occupation for the diarist, in that temporal context. It was not likely, for example, that Diarist 15 would ever meet the family she travelled on the train with again, but they helped make the journey home a good experience. Diarist 14's review of her seminar experience was likely to lead to a different approach in future to ensure a different experience.

- *Good journey home, sat near a nice family Mum, Dad & 4 young children. They told us they had a lovely day at the Zoo. Years since I last went there probably with my own children* d15w1s1

- *The 2nd part of the seminar did not go so well & it is on my mind & wonder if I could have handled the situation with a student better – she found the clinical paper difficult & spent the time complaining as if she sabotaged the group & I was left trying to rescue the dead atmosphere. I also felt angry but it was not appropriate to disclose my feelings* d14w2r2

### *Expectation*

In several of the diaries there was a sense of expectation in relation to things they were going to be engaging in – either with excitement and hope or with anxiety. These expectations influenced whether someone decided to engage in the activity or not. Considerations such as being nervous about numbers attending Sunday School; or worrying about whether people will get on with each other made a difference on how the actual engagement was experienced. Diarist 6 nearly gave up badminton because of infighting between the players. The bickering was not part of the actual activity i.e. badminton, but was a contextual factor which she found unpleasant. A surprisingly good experience, explained below, had possibly changed her thinking on this.

- *9.00am More badminton players arrived and from 9-10 am I had 3 good, hard games. I always feel better after good, hard games of badminton. Good fun & good exercise. Good company. I have thought about giving up as there is sometimes a bit of bickering between a few people and I sometimes leave feeling strung out rather than 'energised', not this time though.* d6w1s5

### *After effects*

Another impact of the social context upon engagement was the *after effects*, where engaging in an activity with people then led to follow up work or high levels of fatigue, for example Diarist 6's comment regarding clearing up and being tired following looking after her granddaughter. Several diarists note the same feeling of enjoying an activity with friends or family but not relishing the work that had to be done afterward.

- *7 pm [son] took [granddaughter] home. I cleared up and then watched T.V. and did crossword/code words. Nice to have [granddaughter] but always a lot of cleaning up and I'm always tired when she goes.* d6w2d1

### *Restricted by*

Some of the diarists mention situations where they needed to work around other people to get things done, this was particularly evident in Diarist 14's experience of being a carer for her husband following minor surgery, where she felt very restricted and had difficulty engaging in her usual activities. None of the diarists mention situations where they were 'not allowed' to do what they want by anyone else, except perhaps following doctor's orders in relation to health.

- *8am Showered. Made bed & generally tidied up the house. Wondering what to do today, as I've kept the week free as I haven't known how much I need to look after [husband]. Already feeling restricted* d14w1d6

- *9am [husband] decided to have a bath – great, Feel I've got the freedom of the house, can quickly Hoover throughout the house without listening to complaints as [husband] doesn't like me hovering – thinks the 'fairy's clean'* d14w1s7

### *Shared values*

The final impact which was evident in the diaries was around shared values, this did not necessarily have to be in close friendships but just within the general social context of the activity in which they were engaging. Below Diarist 6's excerpt aptly described the situation of a general social context being in harmony with her value base; Diarist 9 described a friendship based upon a shared interest.

- *I like the old fashioned feel & values of this small department store & cafe. Everyone is friendly and polite, no mobile phones allowed in the cafe and it always, appears to be used by similar people to ourselves with similar values. I wish more places were like this.* d6w2r7
- *Met [friend] at Little Cinema, [town] – to see 'Le Quattro volte' – We do this often – whenever there's a film we want to see – so have a regular fixed day. [friend] + I share the interest – enjoy doing this together* d9w1r1

Having analysed the physical and social environments, the last context for doing, which is possibly the most consistent factor in engagement is the temporal context. Any occupation is within a time period, and has other temporal components. A person's daily occupations together make a pattern over time, giving routine and structure. There is also a person's stage of life to consider, as this may impact upon the type of occupations they engage in.

### *Temporal considerations*

Time as a context for engagement was evident in several different ways within the diaries. There was the obvious length of time certain activities take, whether they could fit everything in and how well all the activities they wanted to engage in fitted within the time they had available. The diarists also considered the time or stage of life they or their family/friends were in, in relation to some activities (this is also discussed from the angle of intrinsic motivation within the subtheme around *Ageing – Physical and Social*.) The first sub-subtheme to be considered is *length of time*.

#### *Length of time*

As this was a diary study, the participants wrote in approximate start times of different activities, but of more interest was the commentary they wrote about how long certain activities took them. This usually happened when something took longer than expected.

- *I thought the eye test would take 20mins and I was at the optician for 1.5 hours. Next time would not make plans to meet someone after the eye test because I kept them waiting* d14w2r4

Also, when they deviated from their usual routine (Diarist 13 always cleaned the cooker on a certain morning but the opportunity to clean the guttering had to be taken advantage of).

- *10.00AM As there is scaffolding round the house we've decided to wash the guttering so it's up the ladders with buckets of soapy water. All this white UPVC guttering and doors looks very good when new but it's not very practical, I'm sure mine are the dirtiest in the road. 11.30am that took longer than I thought but now I'll do the cooker.* d13w1s4

This linked with the discussions diarists had about fitting activities in, as estimating timings was part of that process.

#### *Fitting activities in*

All the diarists had full lives involving a lot of different activities to fit in, except perhaps the oldest diarist, Diarist 15, who had a slightly slower pace and spent more time alone. They all discussed how they juggled their time, to a certain extent, to ensure there was time to fit in all their desired and obligatory occupations. Diarist 6 and her husband divided their time between their home in the city and a holiday home by the sea, the plan seemed to be to retire to the seaside full time eventually when her husband also finishes work. However, having a granddaughter who they looked after during the week seems to have put this plan on hold for a while. In the following excerpt, Diarist 6 reflected not only how long the journey home was going to take but how long she was going to be able to continue to keep up the effort needed to live in two homes, so timing had become a big issue for her, both in the immediate future but also in relation to the timing of their permanent move.

- *7.15pm. Left [seaside town] to travel home. Much as I enjoy coming to [seaside town] I don't like having to travel back home in the evening. I'd like to be able to stay put & relax. I sometimes find living between 2 homes/places quite tiring and worry that I can't fit everything in.* d6w2s7

In the excerpt below, Diarist 1 noted that time had run away from him, but had a relaxed attitude to this, possibly because it was a weekend day, and decided to engage in a musical activity for enjoyment instead of going out as had been the original plan. He seemed to demonstrate the slowed rhythm that Jonsson, Borrell and Sadlo (2000) explored in their research into older people transitioning into retirement, where the pace of life seemed to slow, and activities stretched to fill more time than previously. It is also an example of the spontaneity that the diarists exhibited in relation to how their lives were organised.

- *12.30 The morning has disappeared. We had intended to go out to a community festival/street party (there are two on this afternoon), but probably won't make it. Went inside and played piano for a bit I am a crap pianist, but I enjoy it.* d1w1s6

In the excerpt below, Diarist 11 reflected upon what makes good night time activity, deciding reading emails is not one, this reflection may lead to a change in her occupational pattern, perhaps deciding on an early time to read emails or a curfew regarding how late she can read them until. This is indicative of the small tweaks that could be made to a person's activity pattern if they had the time and the tools to reflect upon their current engagement.

- *11 check emails, off to bed with a book. reading emails at night not a good idea – I stay up later than I should* d11w1d7

Time and its management is a large part of the concept of occupational balance. Whatever current definition is used there it is a temporal notion as part of it, even if it is not a balance of time spent in different categories of occupation. The diarists were aware that there was a finite number of hours in a day/week/month and did plan some of their time accordingly – with some clear routines and set times/days for certain activities. There were times when these plans went awry, or they needed or wanted to deviate, this required some adaptation on their part. The first step for adaptation is to reflect upon the current situation, the examples above demonstrate that the diarists could reflect upon their activities and make amendments when needed.

### *Stage of life*

Whilst the time or stage of life they were in is discussed in detail in the sub-theme, *Ageing – Physical and Social*, as an intrinsic motivational issue for the diarists, it is also a temporal context. They were in a certain stage of life, and had family and friends in either the same, older or younger stages of life. This context did impact upon some choices they made. See the two examples below, Diarist 2's excerpt demonstrated her determination to fulfil a life ambition, despite the cost, as she has been to the funerals of many of her cohort recently. Diarist 6, as a slightly younger diarist, was concerned about the stage of life of her more elderly aunt, and felt she must spend as much time with her as she could.

- *5.30 TV Couldn't wait for Chelsea Flower Show preview. I am going on Thursday – it's always been one of my ambitions to go. Now it's a reality. Can't worry about the cost (£75) I have been to so many funerals this year that I thought I had better get on and fulfil some of my ambitions.* d2w1d6
- *10.30am Left home to go to visit [Aunt]. I want to spend more time with [Aunt] if possible...She is in her late 80's so time is precious* d6w1d6

### *Conclusion*

Briefly reviewing the analysis to this point, this chapter has focussed on the occupational performance and the environment/context for that performance, meaning the E and OP of the PEO model. Some of the key points this analysis raises are round social participation being important not only as an occupation but also as a motivator for engagement in a range of other activities to support it. It also appears that the quality of their engagement and the satisfaction with that engagement is more important to them than considering what category their engagement falls within. There seems to be one or two lynch-pin activities in an older person's life, around which the occupational pattern is built – perhaps mirroring what happens during working life when work takes that role. A final interesting point to note is that the diarists engage in activities which appear to be as much about projecting who they are to the social environment around them as anything else.

The next Chapter will look in more detail at some of the explanations for why the diarists engaged in the occupations and patterns in their lives and what they personally gained from this. The diarists were quite clear that they wanted to do some things a certain number of times a week and that they could see a physical or social benefit to this, alongside the self and home maintenance activities that have been discussed previously, a rough sketch of what these diarists did with their time is starting to coalesce, along with some of the contextual elements which were in play during their occupational engagement.



## Chapter 5: Findings – The Person element of PEOP

### Introduction

This chapter covers the three themes: Influences on Engagement in Doing; Elements of Planning, Pacing and Pausing; and Continuity and Belonging. These themes relate more to the personal intrinsic factors which impacted on the diarists' engagement in their day to day lives, so the first 'P' of PEOP. There is not a hierarchy or expected order in which to consider the elements required for occupational engagement, however examining the demands of an occupation, requires a consideration of skills, abilities and motivations of individuals or groups, who are engaging in the occupation. Their own intrinsic factors will influence their experience of the occupation and therefore the importance of certain occupations within their occupational pattern. The first of the three themes to be discussed in this chapter is Influences on Engagement in Doing.

### Influences on Engagement in Doing

This theme has four subthemes linked to what impacted on the diarists' abilities and willingness to engage in their various activities, and so directly speaks to one of the research questions i.e. *how do older people perceive the factors influencing their balance of occupations?* The subthemes are:

- Motivation
- Ageing – both physical and social
- Retirement
- Level of engagement, enjoyment, and *flow*

Figure 12 illustrates this theme, subthemes and sub-subthemes arising from the analysis. It also gives a diagrammatic representation of the interconnections between these themes. As discussed previously, although the scrutiny of the analysis necessitates viewing each of the themes separately, there are many interconnections between the themes in the analysis framework. For example, The *Contexts for Doing* theme is about the extrinsic environments in which the activities occurred, whilst these do not link directly to *Influences on Engagement*, external contexts impact upon *Elements of planning, pacing and pausing* and on *Elements of Doing* and have a secondary impact upon this theme, about motivation and enjoyment. For example, an uncomfortable, uninviting external context is likely to negatively impact upon motivation, in *anticipation of enjoyment*.

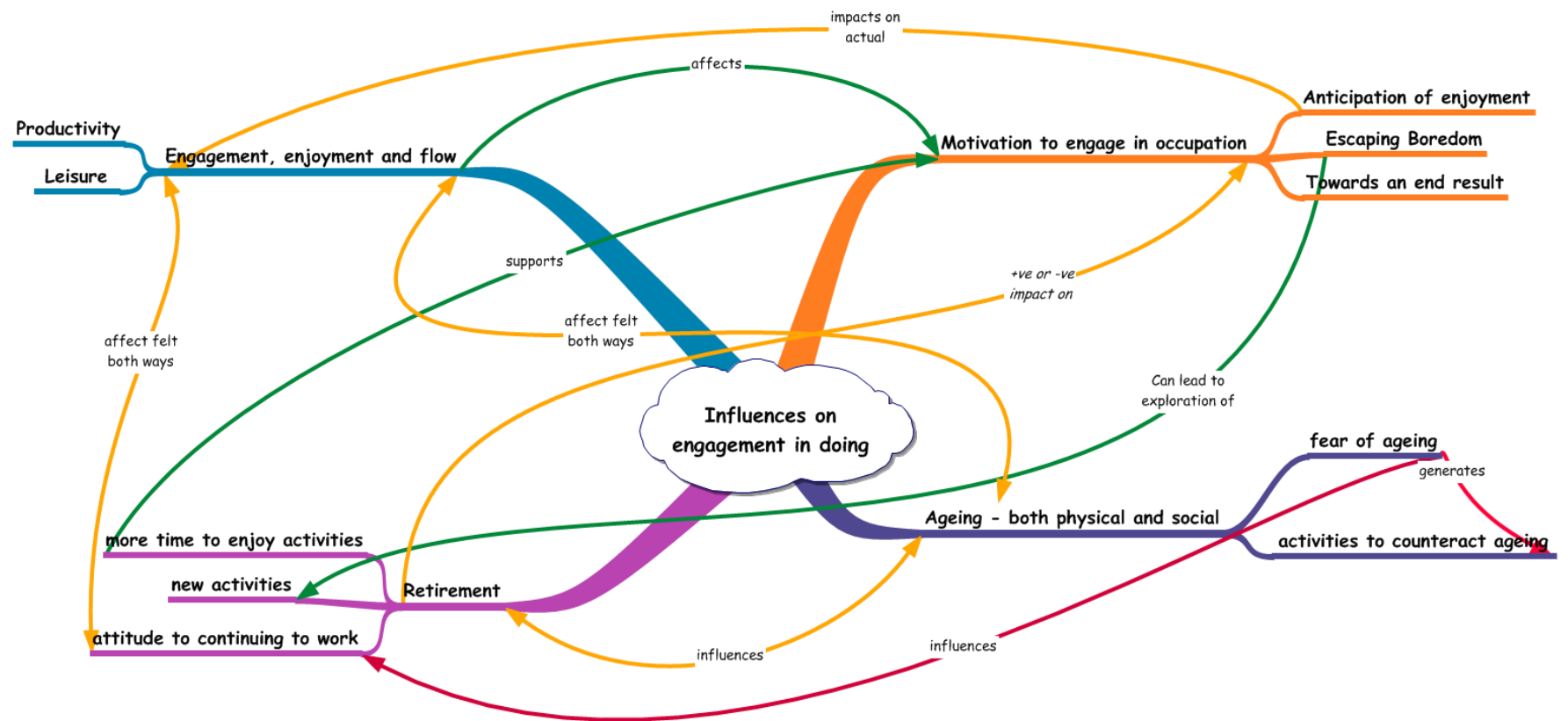


Figure 12: Influences on Engagement: subthemes/ sub-subthemes/ links between concepts

Continuing with the analysis, the subthemes *motivation to engage in occupation; ageing -both physical and social; retirement; and levels of engagement enjoyment and flow* will be explored in more detail, using examples from the diaries where appropriate:

### *Motivation to engage in occupation*

*Social Participation and Sociability* could be seen as a core motivator in the diarists' lives and has been discussed in Chapter 4, alongside this, *Continuity and Belonging* was also a core motivator and will be discussed later in this Chapter. Motivation is therefore a concept which intersects with all sections of the analysis, as *social participation* and *continuity and belonging* do so.

Motivation to engage in occupation, when viewed from this perspective links to the *relatedness* need of the three basic psychological needs – autonomy, relatedness and competence (Ryan, 1995), which are the basis for people's self-motivation (Ryan and Deci, 2000) in self-determination theory. Some of the diarists' occupations relating to social participation also motivated other activities which were supportive of that social participation. The occupational pattern of the diarist's daily life was drawn up around this 'lynch-pin' activity.

Within this subtheme, a different order of motivations is explored which were more related to the other psychological needs: *autonomy* and *competence* (Ryan, 1995). Diarists gave reasons for carrying out certain activities, other than social participation and continuity, and explained how these fitted within the day to day flow of their lives. The motivations discussed here are not, in the main, motivators for the pattern of the diarists' occupations. These are motivations for choosing particular activities within that pattern and for the timing of that activity, which are about enjoyment in the moment or producing some tangible result. The sub-subthemes were *anticipation of enjoyment; escaping boredom; and towards an end result*. Examples from the diaries explain these areas of the analysis below:

### *Anticipation of enjoyment*

When discussing the activity of smoking, Diarist 1 wrote:

- *started again when I started performing in pubs; once a week, I enjoyed the conviviality of sitting outside, talking about music with whoever was there, smoking like me. 'Since being with [Partner] I have gone from 3 cigars once a week to 3 a day*

d1w1r3

This strongly suggests that the activity of smoking was driven by sociability in terms of doing it in pubs and the increase to 3 cigars a day came about due to a new partner smoking, but his main motivation appeared to be enjoyment:

- *I do it out of habit (I get cravings) but chiefly because I enjoy the mild buzz and the act of relaxation* d1w1r3

He also had very set times of day at which he engaged with this:

- *'I do it three times a day, after lunch, after dinner, and again during the evening* d1w1r3

He appeared to look forward to this activity with expectation of enjoyment.

### *Escaping Boredom*

When discussing going shopping Diarist 14 wrote:

- *Usually go shopping in Centre of [city] weekly or every 2 wks. – depends. Today did it because I felt bored but usually go to [city] to meet friends' [and that she] 'wanted to get out of the home as I felt trapped.'* d14w1r6

So here the motivation was not any of the main motivators around social participation or continuity, it was purely to escape boredom. Motivations for engaging were not always positively expressed, an activity could be engaged in to prevent having to engage in something less appealing, rather than for its own inherent qualities.

### *Towards an end result*

Another motivation that came through in the entries of the 'gardening diarists' and of diarists who engaged in productive activities such as cooking, card making, or sewing was the creation of an end product that they could use. This links with the *satisfaction with doing* subtheme. It was part of the engagement process but also a motivator for *initiating* the occupational experience:

- *I try to spend some time each week in the garden to keep things under control but so much depends on the weather. I enjoy eating my own vegetables (most of which are grown in containers).* d2w2r5
- *Like gardening, there is the satisfaction of physical effort expended to an end.* d1w1r9
- *Purpose to produce veg. for family –more important than weeding the flower beds!* d11w1r5
- *Making mincemeat... I make a large enough quantity to last 2 years and the longer it stands the more it matures. The mixture is not cheap to make but it is far better than product sold in the shops. It is a family tradition and friends also enjoy receiving a pot. I do think home-made items such as cakes and pies are more enjoyable to eat...* d2w2r7

It also was evident in the motivation for engaging in other activities such as exercise, physical and mental (such as puzzles, crosswords, reading), which the diarists engaged in not only to keep continuity with their previous occupations but also to maintain or improve their functional capacity. This was the tangible end result of their engagement as they saw it, and related to the

*competence* psychological need. It also supported their *autonomy*, as they could continue to make choices and engage in the occupations that they wanted, needed or chose to do. The need for continued competence and autonomy were strong motivations for all the diarists to regularly engage in certain activities, and will be discussed further in the sub-subtheme *Activities to Counteract Ageing* below.

The next subtheme to be discussed, *Ageing – both physical and social* has elements of intrinsic and extrinsic, social/cultural motivations, however, those sociocultural concepts of ageing seem to be internalised by older people and become part of their world view and decision-making processes, hence their position in the Person element of the analysis framework.

### *Ageing – both physical and social*

There was an acknowledgement by the diarists that they were getting older and some anxiety about what that might bring. That this anxiety impacted upon choices they made regarding activities to engage in was evident in several of the diaries. They engaged in exercise, of both the body and mind in an attempt to stave off the perceived impact of getting older. They were grateful that their health was such that they could still engage in the activities that they enjoyed, and those they felt they must do. The two sub-subthemes to be considered are *fear of ageing* and *activities to counteract ageing*.

#### *Fear of ageing*

Overall, the diarists did not dwell on the idea of getting older, but some events and conversations led them to natural reflection on it. It seemed that thoughts of ill health and incapacity brought about by ageing were more worrying than thoughts of dying. In the first two excerpts below, those reflections were brought about by the experiences of others. Throughout the diaries, there was a sense of relief that some of the worst ailments that they had seen others develop had not affected them. There was, however, an ever-present fear that it might develop. In the third excerpt, Diarist 15 is off her feet due to a bout of gout, causing her to reflect that sometimes being older is not good, on the assumption that old age is the cause of the gout, which may be a fair assessment as it rarely manifests in women under the age of 60 (Kiple, 2003).

- 2.15pm Got the washing off the line and had a chat with my neighbour... She asked how [Aunt] was and we talked about our various experiences with dementia. Old age can be quite daunting. Dementia is dreadful for the sufferer and carer, can only hope we don't personally fall prey d6w1s7
- 11.20am visited my friend who is in a nursing home. I only stay for an hour as she is becoming quite confused and conversation is difficult but she still knows me so I try to have a laugh with her. This is so sad. [Friend] is 92, never married and what family she has live in London so can't visit very often. She is always in pain because she has arthritis and osteoporosis. Old age isn't very appealing is it. d13w1s1
- Books are a big part of my life, which is a bonus. now that I am trying to keep my gouty foot up Sometimes getting old is not good d15w1r6

### *Activities to Counteract Ageing*

Leading on from the fear of ageing, the diarists showed that they wanted to proactively work to prevent or reduce these affects. As discussed in the sub-theme *Health 'Must dos'* (see Appendix 11), diarists engaged in a range of physical activities, partly for the perceived impact of this on their ability to engage in other valued occupations. Below are excerpts from three of the diarists, in relation to this need to 'keep fit'.

- *...at my age I know I've got to keep fit... I have to be aware of what my body is telling me as it does not like certain exercises.* d14w1r3
- *Keep Fit: ... Class takes place once a week. This has kept me agile over the years.* d2w1r7
- *...Altho' a small contribution – it is another physical activity – and will help to increase mobility – which is a worry to me as a single person.* d9w1r6

Alongside this notion that physical ageing inevitably brings restrictions in what they could do, unless they engaged in activities to try to maintain their current abilities, was the consideration of social ageing. What the prevalent social environment considered appropriate for people of their age to be doing with their time was a factor which impacted on chosen activities. Whilst the diarists did not necessarily conform to the stereotypical idea of what an 'old' person was, they were aware of these stereotypes and, on some occasions, applied these either to themselves or to other older people. This stereotyping can be restrictive and possibly even lead to people feeling a nuisance, for example see Diarist 6's comment about seeing her GP.

- *8.15am Always a bit anxious when I see G.P. as we don't always see eye-to-eye I accept that my G.P. undoubtedly knows best and would prescribe medication if she felt I needed it. I realise I am really quite fit for my age and should be thankful* d6w1s4

They were proud if their efforts demonstrated that they were more active than would be expected of older people – see Diarists 1 and 12's comments.

- *We are both widowed... Demonstrations of affection at all levels seem to me crucial to affirm this relationship... I am starting again as if I were young again, and I hope to stay that way.* d1w1r2
- *19.45 – 23.00 .... To darts match pub... match finished. We won...we are doing well this summer season, not bad for a lot of oldies.* d12w1s5

They were also able to use their elderly appearance to their advantage when necessary – see Diarist 2's comment.

- *It is good to think people want to recycle instead of dumping rubbish. Maybe because I have white hair people offered to help lift wood into bins. (A smile goes a long way).* d2w1r4

Diarist 9's comment touched on an important aspect around social ageing and what it feels like to age in a society which is youth orientated.

- *8.00 Girls lunch today – so I feel I should make an effort. I do grow less interested in my appearance – neat + tidy yes – more than that No! The invisibility of women my age is clear to me.* d9w2s5

Diarist 6 demonstrated some interesting views about ageing - how older people needed to hold onto family ties as they age; needed to act in ways befitting an elderly person; and being forgetful was having a 'senior moment'. This seems to demonstrate clearly how the prevailing views of being older were such a part of the cultural context surrounding the diarists that it became part of their own world view as well.

- *I feel it is important to maintain contact with family especially as we all now (we 4 female cousins) in our 60's and 70's and not all in good health* d6w1r1
- *One of the women who regularly plays falls out with everyone on a regular basis. I am not happy to see her join the group and feel that women in their 60's & 70s should not be acting like children.* d6w1r5
- *We all met as arranged – although one of the cousins originally got the date wrong and went into town to meet us last week! We all had a laugh about it. Probably a senior moment.* d6w1r1

A major sociocultural context for the diarists was the insistence on people stopping work at a certain age. Whilst that is slowly being changed, it is still expected that people will retire in their mid to late 60s in this country. The transition into retirement is an influence on engagement in doing, it leaves a gap in people's temporal occupational pattern which will be filled with other activities, the choices a person makes will be partly influenced by their experience of and attitude to retirement. Some of the diarists, who had retired more recently, wrote about this and its influence.

## Retirement

When referring to retirement, the diarists seemed, overall, to see this as a positive transition in their lives, they had more time to enjoy the little things in life and took their time over these. Despite having retired from their main employment, several of the diarists continued to engage in paid work. Those who had been retired longer had found ways to engage in productivity activities either paid or voluntary, to an extent that suited them and on their own terms. Where they discussed these activities with dissatisfaction it seemed to be in situations where they were either doing too much or too little, so the pattern of their occupations was not quite right for them. It was interesting to note that despite being retired, the diarists still maintained a working type of pattern to their occupations, and the weekend was experienced as different to the week. See for example, Diarist 9's comment:

- *10.30 Late breakfast with Sunday paper Although I'm no longer working – I still enjoy the 'feel' of a weekend – it's strange really.* d9w2s7

They got up and got on with things in the morning to the similar timings as those going to work. They also mentioned activities which had become their lynch-pin activities around which the rest

of the pattern was built (as discussed in the section on *Pattern of Doing*). This was like working counterparts, where work tended to take that central role, with other activities fitting around it. Three sub-subthemes emerged from the data, these were *More time to enjoy activities*; *New activities*; and *Attitudes to continuing to work*

#### *More time to enjoy activities*

Below are some examples of the general attitude the diarists had to retirement, which was positive. They appreciated the time to enjoy activities which was not available when they worked and seemed, especially, to enjoy more relaxing starts to the day, although still up and about quite early in the morning. See Diarists 9 and 13s' comments:

- *8.00 Woke up – good night sleep – got up made tea, fed cat + returned to bed – Read until 9.00 I still relish this relaxed start – after years of rising between 6 – 7 a.m. I am not a morning person by nature* d9w2s1
- *7am My husband got up, made tea and brought it back to bed where we drink it whilst doing the crossword in yesterday's newspaper. This is a luxury you haven't time for when you go to work.* d13w1s1

It was interesting that Diarist 6 mentioned, below, she would not have 'wasted' so much time when she was working. This slight feeling of 'guilt' about having the time to do things more slowly came across in several of the diary entries around different activities.

- *1.30pm Cleared up and had a coffee Wouldn't have 'wasted' so much time when I was working – too much else to do* d6w1s3

Another point a few of the diarists made was that they now had very busy lives and had difficulty fitting in everything they wanted to do.

- *12.00 Just time to organise a couple of meetings with friends over internet before lunch. I find it hard to understand how – when I have so much free time – it's so difficult to find common dates!* d9w2s2

When diarists had continuity, as in they met with old work mates (who were still working) or had other contact with their previous professions, they seemed to show relief that they no longer had the same pressures upon them, none of the diarists mentioned any regret regarding their retirement.

- *5 pm Met [2 friends]. Had a meal & drink & caught up on our news. Neither of them are happy at work – lots of changes Glad I'm now retired and don't have the work worries that my friends still have.* d6w2s2
- *10.00 I tidied up – [Friend] started her prep for teaching practice tomorrow- I ended up helping [Friend] prepare phonics + measurement lessons for tomorrow. I'm amazed how different it all is – from just 10 yrs. ago. Glad to be out!* d9w1s7

#### *New activities*

Some of the diarists discussed changes to their patterns of doing which were directly related to their retired status. Diarist 6 made some conscious changes since retirement both in terms of



family social participation and in relation to the garden environment, again to support some interaction with her granddaughter as well as to enable her to do gardening more easily.

- *I met my 3 older 'girl' cousins for lunch. Since I retired we have met on a regular basis – about once a month. We meet in [shopping centre] and have lunch or just coffee and a catch-up together. Prior to retiring I saw one cousin once or twice a year and only saw the other 2 at family funerals. I determined that when I retired I would contact them and suggest we meet on a regular basis. They were all more than happy to do so.* d6w1r1
- *9.30am [Gardener] called to give us estimate for work in back garden Quite happy with [Gardener]'s estimate. Wouldn't have wanted work done while I was working. I spend more time in garden since leaving work and since having granddaughter to want to make some improvements* d6w1s2

Diarist 1 stopped engaging in travel when he retired as it had been part of his employment, but now with a new partner he was discovering this as a valued activity again.

- *I feel excited, keyed up, and I will be jumpy until we actually leave. Then I will become quite calm. Travelling used to be an important and the most enjoyable part of my job. I stopped when I retired, and now, with [Partner], I am starting again.* d1w2r7

Overall, the diarists seemed to value continuity and belonging to a large extent and did not mention many completely new activities which had only started since retirement. That is not to say they did not have plans to do new things such as go on holiday, or visit family abroad, but in terms of their everyday lives they seemed to want to keep this in harmony with previous occupational patterns. Diarist 17 went further in that she stated that retirement as a concept is something she did not believe in and continuity was extremely important to her.

- *I then became a fulltime activist and volunteer social worker (activities I continue into 'retirement'). (I don't really believe in retirement – rather in continuing with interesting projects for as long as possible.)* d17bis1

#### *Attitude to continuing to work*

As mentioned in the section on the theme *Elements of Doing*, most of the diarists engaged in either voluntary or paid work. In the excerpts below, two of the diarists gave some insight into the reasons they continued with some paid work. Diarist 14, who was very invested in her work and spent a lot of her own free time in preparation – reading and admin - did it because she wanted to keep busy and keep her mind active – a motivation shared by several other diarists in relation to their productivity activities.

- *6.45 This will be challenging – taking a group with no experience of counselling. Will need to find a supervisor who supervises supervisors. Aware that [Husband] will be saying I'm taking on too much work, I should be taking it easy after retiring. I hate being idle. I like my mind active.* d14w1s1
- *I keep doing it because I enjoy having contact & talking to different people. I enjoy seeing the clients as they are challenging, often disturbed & suicidal* d14w2r6

Diarist 9 was not so invested in her work and appeared to do it for the connections and continuity, plus the opportunity to use her knowledge and skills, and again several other Diarists documented these as reasons for their productivity. At one point in the diary study, she decided to give this up, due to changes in working conditions. She mentioned that she would miss the money but was not reliant on it, so finance was not a large motivation for her.

- *12-4 work as exhibition guide – I provided “emergency” cover. Altho’ I’ve officially retired – I do help out at [Tourist Attraction] – irregular – a lot in May but only 2x in June. I still value the connection with this work – place and people. Being able to make a contribution + a depth of knowledge of the subject.* d9w1r5

In relation to voluntary work, as discussed in the sections on *Community Level Social Participation*, and *Work and Community Involvement*, several diarists engaged in a variety of volunteering roles within their communities. It seemed to be more prevalent in the diarists who were not involved in any paid work and may have provided the same experience as employment in relation to the innate human need to be productive (Wilcock, 1999b). This was alongside the strong motivating factor of the social participation element of voluntary work. Diarist 8 below explained the satisfaction gained from teaching the Sunday School,

- *I love doing Sunday School but realise how numbers have dropped over the years. Still we have our regular little group aged 3 – 16yrs. It really is good to see the older children still like to come, Sunday School is so very satisfying for me and the helpers and parents who attend as well.* d8w1r7

And Diarist 17 was clear that she was going to continue to engage in campaigning, which tied with her earlier comment, about continuity of interesting projects after retirement.

- *I was very interested and engaged. (Good discussion.) Sometimes, when a particular issue was mentioned, I felt a bit of pressure (internal to myself) to take on the relevant campaigning initiative. But I have to pace myself... I mention this activity because campaigning is still part of my life.* d17w1r7

Besides any formal voluntary or paid work, diarists also engaged in family level voluntary work such as looking after grandchildren whilst their parents were at work, which could be seen not only as a social participation activity, but also as productive in terms of both reducing costs for their children and raising the next generation of their family.

The motivation to engage in both economically and socially productive occupations (Fossey and Bramley, 2014), continues into retirement for many older people, as shown by the diarists. Jonsson and Andersson (1999) found that financial gain was not the only reason for this, and this was demonstrated by the diarists. Whatever motivated the diarists to engage in paid or unpaid work, it is evident that all of them get a sense of enjoyment and satisfaction in doing so. This links to their *autonomy* psychological need, as the diarists are in the position to be able to continue to make choices and engage in the productive occupations that they choose to do. Their personal

abilities and contextual factors continue to provide an appropriate fit with the activities they wish to engage in.

The final subtheme to consider in relation to personal abilities and motivation is *levels of engagement, enjoyment and flow*. This is an important area as it has been shown in previous research that enjoyment and flow are factors which impact upon a sense of well-being in older adults (Jonsson, 2000).

### *Levels of engagement, enjoyment, and flow*

All the diarists demonstrated their overall levels of engagement in and development of the pattern of their doing. The levels of their engagement are driven by numerous factors, and the most important ones being *social participation and sociability* (see chapter 4) and *continuity and belonging* (see below). The element of enjoyment and being fully engaged in certain activities also has its part to play in steering the overall direction of the different diarists' patterns.

Activities which had real meaning to them; activities that were so engrossing that they 'lost' time during engagement (i.e. experience flow – see Csikszentmihalyi, 2002); and activities which fulfilled multiple needs, all impacted on what they chose to include in their day to day lives. When someone can achieve a sense of flow in their occupational engagement, this can encourage continuation of that activity within their occupational pattern (Cabrita *et al.*, 2017), encourage activities needed to support it and possibly the sacrifice of other activities to ensure they can continue to engage in the most fulfilling ones. There is research that argues that engaging in the activities that individuals' most value, for the experience itself as well as any outcome, can have a far-reaching impact on their attitude to the other things they need to do (Forhan and Backman, 2010; Farnworth, 2004). Also to their sense of well-being, through a process termed 'occupational spin-off', where positive engagement promotes more engagement in the valued activity, and in other activities leading to enhanced feelings of competence, affirmation and well-being (Rebeiro and Cook, 1999, p. 183).

The types of activity in which the diarists seemed to achieve the sense of fully being there and engaged in the moment are varied – seeming to be freely chosen productivity or leisure pursuits, often with or for other people. These two classes of activity are now discussed as sub-subthemes.

### *Productivity*

Diarist 8 demonstrated this in her writing about her involvement in teaching at Sunday School. It had continuity for her from her previous role as a teacher, it was voluntary and, also, helped the church to thrive. All of this gave it great meaning to her, and the positivity of the experience, trying a novel approach to helping the children learn, inspired her. This led her to continue to engage in the Sunday School even when the number attending was small.

- *My spirits were really lifted, the quiz was so successful and it was great to know how much the children had remembered about the Bible stories* d8w2r4

Similarly, Diarist 3 wrote about the great satisfaction she got from her voluntary work where she had time to get to know the people she was helping, and the enjoyment meant she looked forward to this very much. It also led her into other acts of kindness, and connection with others in the community as previously discussed, such as taking a dog for a walk for an unwell borrower.

- *This is my favourite voluntary work. Very personal really get to know the borrowers, their interests, families etc.* d3w1r2

### *Leisure*

Diarist 1 gives a cogent description of how it felt to engage in an occupation which had great personal meaning. When he wrote of being taken out of himself, it is suggestive of having experienced a state of flow, being totally engrossed in an occupation which offered the right level of challenge for his current skill set, and seemed to meet some higher-level self-actualising needs for him. The creativity of this music style seemed especially important to his continued enjoyment and experience of flow.

- *It is the fulfilment of my oldest and dearest ambition, to play and sing and be applauded. It really takes me out of myself. When it goes right, there is a feeling of being part of something bigger than the sum of its parts. Blues is a fixed form, at its simplest three chords and a five-note scale, one line repeated and a rhyming line to cap, but there is room for infinite variation, and we are creating something that has never happened before: even if it is an old standard, this is what we do with it.*

d1w1r6

Diarists 2 and 14 both registered enjoyment of exercise but it seemed to be meeting different needs for them. In the excerpt from Diarist 2 she was writing about a class she had attended for many years and was comfortable with, proud that she could still fully engage with and which offered her some sociable company for the time she was engaged in the activity.

- *How great to do movements as a class. Everyone has attended for years so there is a friendly atmosphere.* d2w1r3

Whereas for Diarist 14, she liked to engage in a solitary gym exercise regime, which was her time to unwind from the demands of her busy lifestyle, including working nearly fulltime and having what she considered to be a slightly demanding husband. Again, if she got 'lost' in the exercise regime and challenged her body with the activity she was engaging in she may well have been in a state of flow, where there was temporarily no space in her mind for everyday concerns.

- *Going to gym has been part of my life for the past 4 yrs. It's something I can do for 'ME'. No demands. I don't particularly like talking when I'm in the gym – just want to switch off & give my brain a rest.* d14w2r1

*Having considered the theme, Influences on Engagement in Doing, the analysis will now move on to consider Elements of Planning, Pacing and Pausing. Whilst separated into three subthemes: planning continuum; factors influencing planning; and pausing and pacing, the overall theme links to the person element of the analysis as it is about the what, why and how of an individual's pattern of occupation.*

## Elements of Planning, Pacing, and Pausing

This theme has a direct connection to preceding theme, *Influences on Engagement*, characterised by the diarists' levels of self-awareness regarding the need to pace themselves according to their own energy reserves, also in relation to planning in time for their important, lynch-pin activities. Their *Social Participation* is also important in relation to this theme, the level of spontaneity demonstrated not only in their ability to fit in enjoyable outings but also being able to put aside their usual patterns and plans to ensure that their community, family, or peer roles and relationships were maintained or strengthened. Figure 13 depicts the subthemes and some of the links within this area of the analysis:

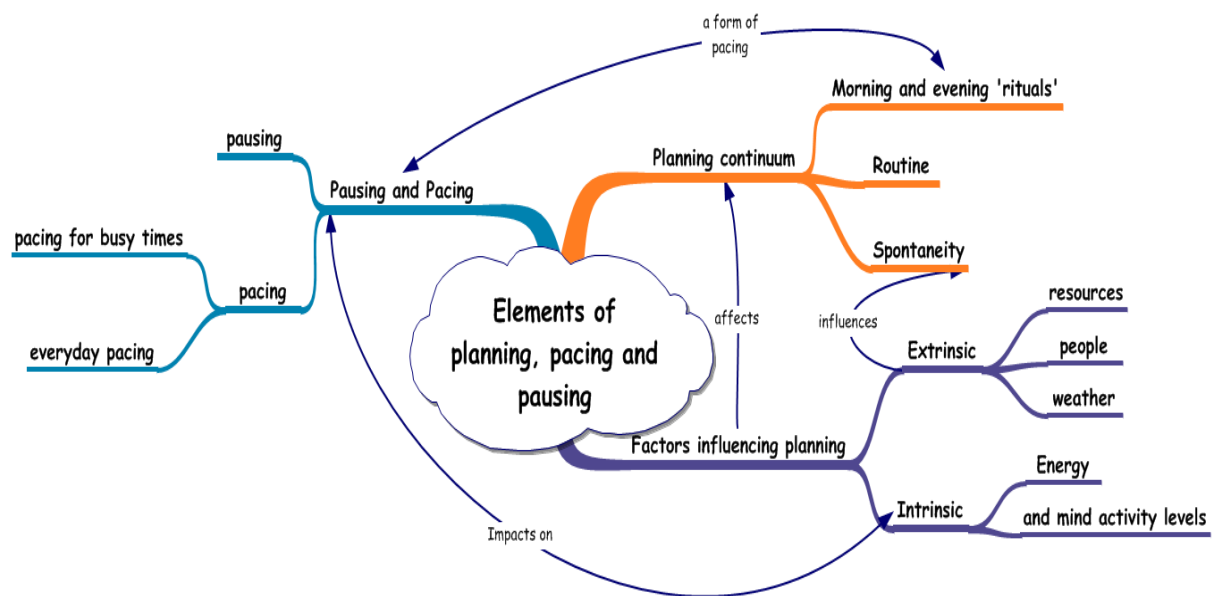


Figure 13: Elements of Planning, Pacing and Pausing, displaying internal linkages

This theme includes three subthemes:

- *Planning continuum* – covering morning and evening ‘rituals’; routine; and fluid levels of planning
- *Factors influencing planning* – external to the person, i.e. environmental and ‘internal’ personal resources
- *Pausing and pacing* – resting and ‘recharging their batteries’ either planned or not

### Planning continuum

The three sub-subthemes can be regarded as points along a continuum. The points on the planning continuum start with the diarists’ set, ritualistic behaviours, which mainly occurred on getting up in the morning and in preparing to go to bed – *Morning and Evening Rituals*. Moving along the continuum were the routinely planned behaviours, where the diarists indicated that their activities were fairly set and happened on certain days at certain times. Towards the other

end of the continuum were spontaneous behaviours, so 'off-the-cuff' less planned for, or unplanned, engagement in activities. Each of these sub-subthemes will now be discussed further.

### *Morning and Evening 'Rituals'*

All the diarists wrote about activities which form part of the structure for their daily pattern i.e. things which happened in the same part of the day, every day. These were most evident in early morning, their 'getting started for the day' (d2w2s4) and late evening and had an almost ritualistic quality they were so 'set'. Some of the diarists recorded them almost as a chant, for example 'wash shave teeth dress' (d7w1s2); 'Bath, Bed Prayers' (d3w1s1); 'up, tea, toilet, breakfast' (d5w2s1).

All the diarists showed these routines to some extent, however not all the diarists would stick to the same order for the activities or the same time, and would deviate from the routine not just because of outside pressure for example if a day out is planned, or a workman or delivery is coming but because they just felt like it. Clearly, regularity did not mean an inability to deviate from routines but these activities were a set rhythm, with which the diarists felt comfortable. The following examples illustrate some typical early morning or late evening routines, from two of the diarists.

- 6.45 Get up, bring in milk, dress, feed cat (who today had been sick) say my prayers  
d3w1s1
- 8.45pm Bath, Bed, Prayers  
d3w1s1
- 05.30 After tea usual morning routine – wash shave teeth dress  
d7w1s2
- 21.30 Bath & bed time  
d7w1s1

However, examples were also found as mentioned above of deviations from the normal routines in response to external factors, such as deliveries or workmen arriving, to make sure that they still have enough energy for the day. Diarist 2 goes to bed early and gets up early to ensure she is ready for the carpenter coming to put some doors in, so has fully planned for the occasion.

- 10.15pm Bed. Made effort to retire early as carpenter will arrive at 8 am tomorrow  
d2w1s1
- 7.00am Alarm wakes me, I must get up, shower & wash my hair before the carpenter arrives. In the end I even had time for breakfast  
d2w1s3

Similarly, Diarist 13 demonstrates the planning she put into being up and ready for workmen or deliveries. This holds true for most of the diarists, most of the time.

- 6.00AM I've woken up and made the tea and as usual we're Sat up in bed with the crossword listening to radio 4 Had a very enjoyable evening and could have done with a lie –in today but must be ready when the men arrive.  
d13w1s3
- 7.45AM get up and shower. I'm expecting a delivery quite early today so I like to be dressed before it arrives.  
d13w1s7

Another external factor could be a late night due to a special event, meaning a later than usual start to the next day. This deviation from the usual routine ties in with the concept of pausing considered later in this section, as shown in this excerpt from Diarist 15:

- *'Got up late, 9am. Tired after yesterday – but I do love going to the National Theatre, lots of people- a girl playing The Violin and a good production – it's worth getting tired'* d15w1s2

Intrinsic factors leading to variations to the normal routine seem very much linked to enjoyment of the fact that they could change their routines with no negative outcomes i.e. they would not be late for work, however there was still a sense that this was indulgent and needed justification or had an air of decadence to it that needed to be relished

- *8.15 Woke up – got up and made tea + breakfast – fr.salad + yoghurt – fed the cat took tray back to bed – read Sunday paper. I hadn't slept well – so feel justified in late start.* d9w1s1
- *7.30-10.00 Woke made tea. Reading in bed – Carl Rogers, London Review of books – had some toast/banana. Sweet decadence!!* d17w1s3

The diaries and in-depth sheets suggested that there are culturally shared morning and night time rituals for many older people that are the 'normal' and expected start and end routines to people's daily lives. Media and advertising campaigns, film and television 'families' based in western cultures frequently portray shared examples of these start up and wind down routines. There is also an anticipated shared cultural understanding with me, of these beginning and end of day rituals as demonstrated in how some of the diarists wrote about these, and other activities, in their diaries.

Some diarists wrote to me using 'short-hand', perhaps expecting me to be able to understand what they meant as I was someone from the same culture, and so would know what followed next without needing a full explanation, even where they had not previously explained the activity more fully. This is shown by their use of 'etc.' even for activities they had not really described in their diaries before. Interestingly this was used more frequently for morning routines than for activities taking place at other time of the day. Three examples show this clearly, from Diarist 5 on the second diary sheet '*shower and shave etc.*' (d5w1s2), from Diarist 8, also in the second diary sheet '*Got up washed hair etc.*' (d8w1s2) and from Diarist 17 in her fourth diary sheet '*Got up, washed, made bed, dressed etc.*' (d17w1s4). Other examples of the use of etc. or ect. very much demonstrate the same suggestion that I, sharing the same western cultural identity, would know what etc. stood for, such as:

- *3.30 Read, tea etc.* d3w2sS2
- *11.15 I arrive home, unload frozen foods Ect.* d7wK2s6
- *8.30 Returned home. Watched a little T.V. and did crosswords etc.* d8w2s6



Moving from this more rigid end of the planning continuum, diarists frequently mentioned the degree of planning which went into an occupation, this might include preparation activities such as packing, finding out train times, organising friends. They also discussed a level of routine or spontaneity around an event, and/or whether it happened so frequently that it did not need planning as such, perhaps meaning that it fell more within the very routine everyday activities with more in common with the morning and night-time quite set parts of their lives.

### *Routine*

Within the routine activities the diarists wrote about there were those which they did weekly to maintain the household, such as shopping and cleaning. Diarist 13 was very clear about some of those parameters i.e. what happened on what days and tried not to deviate. Even when she had other activities encroach, she tried to stick as close as possible to her normal routine. For example, one week she had to start cleaning the cooker at 11.30am as she and her husband cleaned their gutters first. She did not postpone it to another day

- *1.15 On Wednesday afternoons we always go to Tesco to do our main weekly shop so we set off now with the plan to bring our shopping home then go to pick [Friend] up.*  
d13w1s6
- *10.15 As it's Monday I clean the cooker. I do every week and then it never gets too big a chore.*  
d13w2s2

Diarists 5 and 11 both show examples of regular, weekly activities which they undertook for their family. Diarist 5 for his mother, Diarist 11 for her granddaughter. Diarist 5 was doing slightly more than usual as covering for his sister – demonstrating that although these were fairly set routines they were flexible when necessary

- *Visit & shop for mother. I usually visit 3 times a week (C, my sister is her carer, but has had an operation on her foot). Twice a week we have lunch this makes sure she eats on these days*  
d5w1r5
- *Once a week I have my 3yr old granddaughter. Enjoyable but knacker - I really look forward to it.*  
d11w1r6

Diarist 14 had paid employment and so had regular work commitments which structured and took up quite a lot of her time. Work was the lynch-pin for her, and the rest of her activities were arranged to fit in with work commitments.

- *I teach every Monday 2-4.30pm except during the holidays*  
d14w2r2

Diarist 7 was a widower and lived alone, although he lived close to his son and saw him very regularly. He did a lot for his son, including feeding him on most weekdays and feeding and looking after his chickens, checking his security and so on. This gave him a sense of purpose, and he took his activities in this respect very seriously

- 16.00hrs Start preparing main meal for son & self. [Son] works a 12 hour shift 6am-6pm so I prepare his meals Mon Tue Wed Thur and sometimes Fridays if he's on o/time d7w1s2

He lost his wife of 50 years three years prior to writing his diary entries. She was 'a gal in a million that cannot be replaced' (d7w1r7) to him and he visited her grave weekly to clean it and lay new flowers. This was a routine activity which gave a sense of comfort, continuity and belonging to him. Although he saw his son regularly and was a member of a club for older widowers, he spent a lot of time on his own. Going to his wife's grave kept him in touch with her memory, it was the first activity that he completed a reflective in-depth sheet on as it was so important to him, and important that others, including me, knew that.

- 10.30 Prepare for shopping at [Supermarket] and [Cemetery] (Wife's grave) Clean up stone memorial – replace flowers (weekly job) d7w1s1

The other end of the continuum is the spontaneous planning, where the diarists showed that they had the ability to engage in and enjoy unplanned occupations, which will now be discussed.

### Spontaneity

The diarists demonstrated approaches across a spectrum from very routine, ritual like through to spontaneous, sometimes impulsive ways to plan their occupational pattern. Diarist 11 saw herself guided in this by her faith, whilst for others it was in reaction to other factors. Diarists 13 and 8 demonstrated a common theme in the diaries where the spontaneous activity was undertaken as a rebalancing decision. Diarist 13 had done a lot of cycling and wanted to do something different, and similarly Diarist 8 had been indoors for several days and now had the opportunity to get out and decided to take it.

- 14.45 As we've cycled a lot this last week we decide to go for a walk this afternoon. We're lucky to live so near to some really nice country side. d13w2s1
- As I had been housebound with the kitten for four days, I decided to catch the bus to the Mall. I have not been to the Mall since before Christmas so I was looking forward to a shopping trip with nothing special to buy d8w2r2

These decisions seem indicative of some reflection upon their pattern of engagement and a general need to 'balance the scales' to some level. This may not be very conscious, or fully coalesced as a process, but it was evident in their explanations of why they might have decided to do something different from the usual. The following sub-theme explores in more detail the factors which influenced their planning continuums.

### Factors Influencing Planning

The factors influencing planning are like the *Contexts for Doing*, which impact upon the enjoyment of and motivations for engagement in occupations, in that these are *Extrinsic* or *Intrinsic*. These are, however about the planning stage, not the actual execution of the activity.

### Extrinsic

In terms of Extrinsic factors influencing planning, these are Resources, People and Weather, which will now be discussed.

### Resources

Resources included equipment, transport such as car or bike, costs of activity and so forth. An example in relation to transport is that of Diarist 13, the unreliability of her husband's bike was making it difficult for them to plan and go on longer bike rides.

- *3.45 Decide to go for a little ride just to make sure the repairs to [Husband's] bike are o.k. Go about 2 miles and his gear cable snaps. Return home. This is very frustrating. The repairs this morning were expensive as parts had to be replaced and now this.*

d13w1r1

For Diarist 7, who kept and maintained vintage motorbikes, he acknowledged the costs entailed of this hobby, but it did not seem that the cost would prevent him from engaging. If an activity is meaningful for an individual, it is not easily abandoned.

- *11.00 I return home, sort out shopping. Still raining – collect new oil from autoshop – price gone up. Very expensive now for straight oils – not multigrades as used in today's motors*

d7w1s7

The last three excerpts are also about the costs of the activities the diarists planned to carry out. Diarist 17 had found a way to reduce the cost of a domestic chore and was satisfied with this saving

- *9-9.30 Retrieved remaining laundry, tidied up, washed up. Put clothes away. Laundry is supposedly £5 a week – so I usually do it fortnightly (=£10 a month, instead of £20.)*

d17w1s2

Diarist 1 and his partner were planning to get the most from their membership of the local Lido, both in terms of how often they went, but also by using the showers at the Lido rather than at home, thereby capitalising on their investment.

- *We took out a year's membership of the [Town] Lido: expensive, but then if we don't go almost every day we feel cheated. We go together, usually by car – tried cycling once, but the hill coming back defeated me!*

d1w2r2

Diarist 2 was pondering whether to invest in a WI course which she acknowledged were expensive but she had really enjoyed in the past. She decides against it as she is having work done on the house which is also quite expensive.

- *I have not been on a course for many years as it is expensive, but whilst there kept thinking of the good times I have had.*

d2w1r9

### People

Another external factor was other people, i.e. the social environment. This impacted upon all the planning continuum, there were examples where routines and events were planned and diarists

were concerned about the possible impact of others' behaviour. An extreme example of this was Diarist 3's excursion with three people who only had her in common, meaning that how successful the trip was for her was dependent very much on how they behaved with each other.

- *Am going to [Town] market with 3 people who don't know each other, only me. Worry whether they'll get on.* d3w1s1

There were also the impacts which led to changes to planned activities, even if already begun. For example, Diarist 8 decided to curtail the lawn mowing and engage in some impromptu social participation with an unexpected caller instead:

- *2.20 Went outside to mow lawns and cut around all the edges. Only managed to do a little work before a lady down the road stopped to talk. She had not long come out of hospital so I invited her in for a cup of tea and we continued our chat.* d8w2s4

Diarist 6, it seemed, had to plan in extra 'hanging around' time into her daily schedule on days when she had her granddaughter as her son was never on time. Whilst people being late offered a level of frustration to some of the diarists, they were, overall, tolerant of this and as with Diarist 6 allowed time in their schedule where it was a regular feature of an activity:

- *9.00 [Son] supposed to be coming up with [Granddaughter] at 9am but as usual late so just hanging around waiting for him* d6w1s3

This tolerance is in marked contrast to how their own lateness was viewed, for example Diarist 14, was very annoyed with herself for planning a social event after an eye examination, as the examination made her late for the social event.

The other impact people had on planning was when they did not turn up at all, again, this type of situation led to the diarists considering how to plan things differently in future so it did not happen again. Unless, as was the case for Diarist 17's friend, it was pure human error causing the issue.

- *I got annoyed waiting for [Friend], who didn't turn out – and in the end walked to the station and caught train back to [City]. The activity went awry because it seems [Friend] arrived an hour late, having not realised the clocks had changed at the weekend* d17w1r8

In that situation, again, the diarists' whilst aware of their own frustration seemed tolerant of the behaviour. There was enough spontaneity within their planning process to allow for adaptation and change to their schedule, this is possibly helped by constant adaptation being required due to the final extrinsic factor to be considered, weather, meaning that the adaptive processes would be well honed.

## Weather

The most mentioned extrinsic factor influencing plans and planning was the weather. Regular activities were at the mercy of the weather, especially gardening:

- *I try to spend some time each week in the garden to keep things under control but so much depends on the weather.* d2w2r5

Usual outdoor pursuits also had to be abandoned at short notice if the weather conditions were not right, and alternatives found, as shown by Diarists 13 and 14,

- *2.45 As the weather is too unsettled to go cycling we decided to have National Trust afternoon and visit [Stately Home] in [County].* d13w1s1
- *12.30 Light lunch. Talking to husband, raining ++ so will not go out today, also too wet for gardening* d14w2s1

In the case of Diarist 14 it was an opportunity to spend time talking to her spouse, phoning her daughter, going on the computer to mark essays, followed by preparing the evening meal. Both these examples demonstrated the flexibility that diarists had in their daily lives to allow for the vagaries of the British weather.

Sometimes planned events were impacted by inclement weather, especially where travel was involved:

- *0815HR Telephone call – Sever downfall heavy rain, much slower driving in traffic – but on our way to pick you up.* d7w2s3

And spontaneous unplanned activities were engaged in and trips taken in good weather (see also Weather and Seasons).

Quite frequently, diarists wrote about needing some thinking time to decide what to do because of the weather's influence, if there was some free time to engage in a spontaneous activity. In the case of Diarist 12, this was planning to involve the diarist and his partner.

- *07.00 Tea in bed. Crossword & radio 4. Weather good so think about what we can do today.* d12w1s6
- *... Not a very bright day and showery so unsure what to do. [Husband] rang his sister in [City] to see if she had her grandchildren with her & we could get together but couldn't make contact.* d6w2s5

In the case of Diarist 6, this planning was to include not only her family, including grandchild, but also wider family if available. As they were not, she needed to consider further what to do with the day, with its uncertain weather conditions.

These extrinsic factors impacting planning are complex and can intertwine. The decisions that individuals took about their occupational patterns were shaped by one, or all, of these factors, alongside the intrinsic factors to be considered next, at different points in their daily lives. How

these decisions enabled the individual to plan and achieve aspirations; feel a sense of sociocultural acceptance; and have continuity in their lives alongside the actual pattern achieved, seemed to be some of the constituents of occupational balance for the diarists.

### *Intrinsic*

There were two intrinsic factors influencing planning. One was energy, and the other was mind activity levels, also linked to energy but specifically focussed on the mind's readiness for engagement. Intrinsic factors which influenced the actual performance of the activity have been discussed in the section on *Influences on Engagement in Doing*.

### *Energy and mind activity levels*

Diarists wrote about matching their energy levels to the activity they were going to engage in, for example Diarist 9 decided on an informal basis how much paid work she engaged in, and gauged this based on how much she felt she could manage with her stamina levels, as well as whether the timing fitted with her schedule.

- *9.30 Phone call to ask if I could help out (12.30 – 3.30) at work. I said yes, I do try to help when I can – 3hr shift fine for timing + stamina* d9w2s7

Diarist 14, who had a busy occupational pattern had very little down time, where her brain was at rest, so having the opportunity to watch soaps and not think about anything else was probably crucial for her, she did this even in the face of opposition from her husband who did not like her watching them at all. She was planning in time to 'turn off' and relax, so reducing her mind activity levels

- *7 pm Arrived home. Alec home. Made my own supper – cheese salad & sat & watched the 'soaps' for 1 ½ hr. Felt lazy & gave myself permission to be 'brain dead' – bliss, not having to think just stare at the TV* d14w2s2

This feels like a protective strategy as frequently she referred to her mind being active, and having a lot to think about.

- *10.40 Put the light out. Found it difficult to sleep, my mind v. active thinking of today's seminar/students. Generally felt low* d14w2s2

Planning and preparing impacted upon the diarists' mind activity levels, for example Diarist 9's plans for a trip had her mind buzzing, making sleep difficult. In another excerpt, below, she wrote about concentrating on a learning opportunity. This was in relation to learning to sing in a gospel choir. She particularly chose this activity as she knew it would be mentally challenging, so was planning for an 'active' mind.

- *11.30 Went to bed. Mind buzzing re: what I might forget for trip!* d9w1s7
- *I had to concentrate really hard, which was good and my hearing wasn't too problematic in a small group + with close proximity to the teacher.* d9w2r6

At the other end of the spectrum were activities which formed part of the routine for the diarists, such as domestic chores. These gave an opportunity to just 'do' whilst the mind could wander. Diarist 6 explained this well in the following excerpt.

- *When I am on my own doing mundane chores, I tend to day dream or think about anything and everything. I cannot recall thinking about anything in particular.* d6w1r7

These intrinsic factors influencing planning are very much linked to the final subtheme which will now be discussed i.e. *Pausing and Pacing*, and will be contemplated further within that subtheme.

### Pausing and Pacing

The diarists showed insight into their capabilities and within the diaries there seemed to be two tools they used to ensure a match between capability, energy and challenge within their occupational pattern, I have labelled these as pausing and pacing. These were linked concepts but were not quite the same.

#### Pausing

Pausing in the diaries were rest days and rest times, 'recharging batteries' after a busy time, occurring after an event and not prior planned. The Diarists may have been engaging in activities where they expected that they would feel tired but had not made a conscious plan regarding rest and recuperation.

Diarist 1 had a day of heavy gardening followed by an evening drinks reception, for which he had to get dressed up smart. He was not used to those sorts of events. The combination of these activities led him to 'flake out' afterwards.

- *21.30 Back home. Flake out with book till bedtime* d1w1s3

The context around Diarist 2 feeling the need for a 'pause' was that she had been to the DIY store and purchased garden supplies, unloaded them when back at home and then was in the garden until lunch. After lunch she went to visit her friend in hospital, in the city centre, by bus. It was a very hot day, extremely hot on the bus, and the friend has dementia which made her sad when visiting.

- *4pm Home – felt mentally and physically drained. Fell onto bed in cool bedroom and slept for an hour. Feel much calmer when I wake up.* d2w1s5

The final two excerpts are pauses where the diarists felt that they had earned the rest due to what they had been doing beforehand. For Diarist 6 this was housework and for Diarist 9, she had just returned from paid work.

- *11am Cleaned and hovered downstairs. Sense of satisfaction finishing cleaning throughout and being able to sit down and relax* d6w1s7

- 4.30 Got home + Flopped with tea + book. At least I feel I've earned my sit-down on Wed's. d9w2s3

### Pacing

In contrast to the more impromptu pausing, pacing was about listening to their bodies and consequently reflecting on what they had done and how they were feeling. It was planned rest activity, clearly incorporated into the pattern of the diarists' activities. There were two slightly different types of pacing evident:

#### Pacing for busy times

This pacing occurred before an event, or after, i.e. an early night before a long day, a quiet afternoon before an evening out, or taking short rests in between doing heavy work, for example, in the garden. Diarist 2 demonstrated clearly that she knew her body and always made allowances for upcoming plans, in terms of ensuring she got to bed early when she had a busy time coming up the next day, see the first two excerpts below. The third excerpt shows her acknowledgement of the place attending church holds in terms of allowing her 'space to re-charge'. This suggests she was taking care of herself both physically and spiritually/emotionally. Considering the pausing she demonstrated below and the physical exercise she undertook, it was clear that Diarist 2 was determined to look after herself and ensure that she could continue to engage in her valued occupations for as long as she could.

- 9.45 Get ready for bed - I must be up early and I know I have a busy day tomorrow d2w1s2
- 9.30 Final watering. Must get a move on – have to be up by 6.30am tomorrow for busy day away from [City]. Hope it's not hot in bed. d2w1s6
- 8.00 Service. Why do I go each week? It gives me space to re-charge for the week d2w1s6

All of the diarists have activities they use as 'pacers'. For Diarist 11 was it a couple of hours watching TV and reading the paper after she had her Granddaughter for a day. For Diarist 8, having a ready meal took the pressure off meal preparation on a busy day, and for Diarist 7 (and several others too) a long soak in the bath was called for after a hectic day.

- 7-9 "recovery" for me – eat meal read the Guardian, watch TV! d11w1s6
- 6.00 Cheating tonight – bought lasagne in Marks so only need to prepare salad!! Lovely to have a ready meal. d8w1s6
- 1800 Meal time – relax – Telephone wrings – old Soldier from [Town], ½ hour chat. 1930 decide to have a long Soak in bath, after hectic day – d7w2s7

#### Everyday pacing

Pacing was incorporated into daily patterns without a catalyst of an event – for example, regularly resting at certain points in the day. This was most evident in the diarist's lives around lunch time, early or late afternoon, I have included four examples below. It was interesting to



note that all of them except Diarist 3 had the TV as part of the pacing activity. Diarist 3 did not mention watching TV at all in her diaries, apart from a 1hr religious film on one day. She read, and listened to the news on Radio 4.

- *12pm Lunch, borrowed book from the library. Came home and rested* d3w1s3
- *12.30 Time for lunch. Soup & scrambled egg on toast. Watch the news then read for a while. I'm glad to sit down & have a rest.* d13w2s4
- *6.00 TV, cup of tea, relax, read, TV* d5w2s1
- *18.00 Time for rest period (television news) tea break* d7w1s1

Diarist 15 expressed clearly the concept of pacing, i.e. to have a quiet day after a busy day to help recovery from the exertion of the previous day,

- *...Quite enjoy being idle, especially after a busy day. and enjoyed poring over the General Knowledge X Word. It's good to refuel one's batteries...* d15w1r2

And Diarist 9 expressed another point regarding pacing, that for those with musculoskeletal, or other, impairments evenly spreading effort across the day/week was the best way to maintain current levels of function and enabled individuals to continue to engage in their valued occupations.

- *I planted up some new seedlings – but I wasn't able to do as much as I hoped, due to my back, But it can't be ignored – I need to do a little and often really.* d9w1r2

There was a conscious decision by the diarists, seemingly based on an internal risk assessment; understanding of their abilities; and past experience and reflection, to build rest and recuperation in to their daily lives. They did this either as a response to a one-off stimulus, or in more planned way, integrated into their pattern of doing. There was acknowledgement by some that they were slower than they used to be and, also, still some guilt felt about being able to take time over things. I surmise that this guilt was predicated upon the idea that if an individual is not economically productive then they are not as worthy of respect, access to services and the community as those who are, so having time in this way is an outward manifestation of their 'unworthiness' or lack of economic productivity. The idea that people can be socially productive and this has as much value as economic productivity is becoming more mainstream (Hammell, 2009b) but years of ageism and social exclusion has an impact upon people's self-perception, and they can see their time as 'wasted' if they are not either doing something useful to society, or something which maintains their health so that they will not become a burden to the state in future years.

Having considered two aspects related to the person facet of the PEO framework, my analysis will now move on to consider the final one, continuity and belonging. As discussed above this is a strong motivator for engagement, with strong links to social participation both from a continuity and belonging viewpoint.

## Continuity and Belonging

*Continuity* was evident in the diaries and discussed by the diarists in several different ways, around engaging in same or similar activities in the now and in the past, living and/or taking part in activities in the same places as previously and maintaining relationships with people over time. This continuity seemed to be an important factor influencing the pattern of the diarists' life activities and bound up in the desire to maintain their roles and relationships within their families and communities. For this reason, it felt to be more than solely continuity but also about *belonging* (a sense of being valued and socially included, and connected to social cultural and physical elements of living – past and present – (Hammell, 2014)), so the two terms were conjoined to form a theme which explored this strong motivating element. Figure 14 gives a diagrammatic view of this theme and the four subthemes ranged within it.

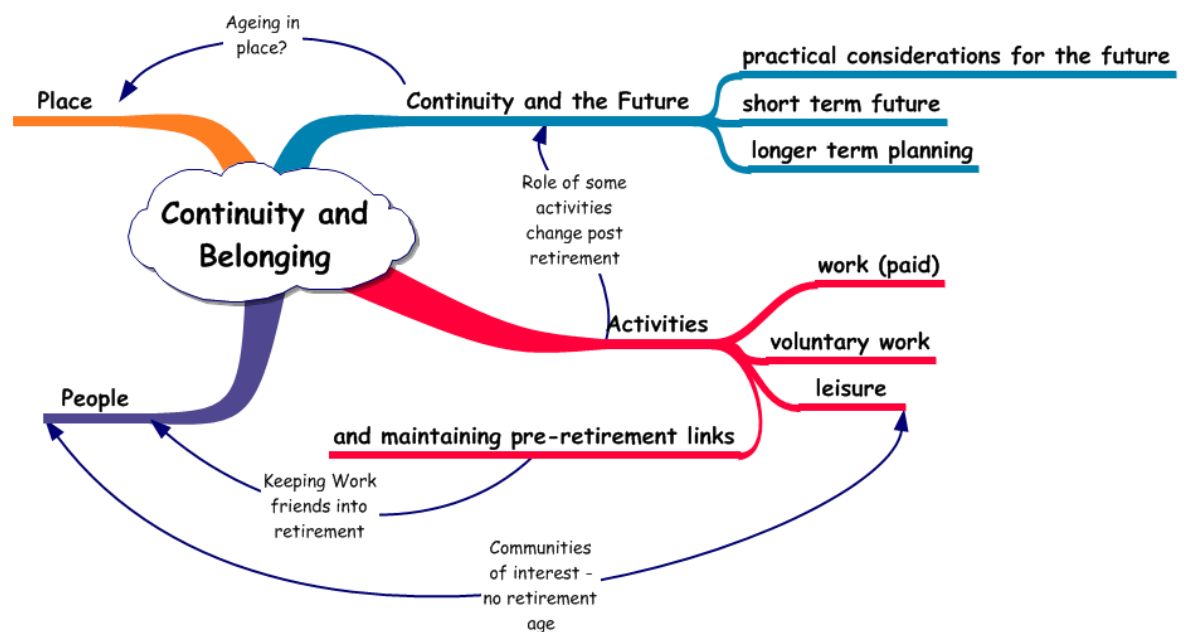


Figure 14: Continuity and Belonging: subthemes and sub-subthemes and links

This theme linked closely to all the other themes but was particularly important in relation to *Social Participation* (maintaining social roles), *Elements of Doing* and *Contexts for Doing* (types of activities and place of engagement). The diarists looked back and linked past activities, people and environments with what they are doing now. Their future plans also contained continuity with what they were doing then and congruence with what they did in the past. This ties with a term called '*life coherence*' (Hammell, 2009b, p. 111). Below some excerpts from the diaries which allude to the sense of continuity and belonging are considered under four subthemes: *Place* - engaging in familiar physical/cultural settings; *People* - engaging with familiar people in familiar social environments, keeping valued relationships alive across time, and distance; *Activity*

– continuity and belonging within their current activity patterns: and the final subtheme – *Continuity and the future* – considering how the need for continuity and belonging impacts upon future planning.

## Place

All the diarists engaged in activities within their communities which were in the same, familiar setting each time, or used the same companies for work, as this seems to provide reassurance that events would go well. The first excerpt for Diarist 2 demonstrated this in relation to using the same coach firm for the WI trips for over a decade.

- *Drove to [Local Coach Firm] in adjoining road to sort out last gardener's trip for this year. How the time has flown. We are going to [Stately Home]. I have been organising the trips for the past 14 years – [Local Coach Firm] are very good to us, excellent coaches, and drivers and competitive charges.* d2w2s5

In her second excerpt, she again demonstrated how important continuity of place was to her, she used the same shops that her father used, almost as a tradition. In general, throughout her diary entries, Diarist 2 demonstrated strong continuity and belonging ties to place, people and activity, and has been used as an example quite extensively in this section. All the diarists did demonstrate the need for belonging and continuity within their diaries, but Diarist 2 gives the clearest examples.

- *11.15 ...drove to the local off licence to purchase some miniature bottles of spirit for the mincemeat. I go into the shop once a year, exchange family news as my Father used to be a regular customer before he died.* d2w2s6

Diarist 6 had a flat in a seaside town, which her and her husband used as a weekend getaway as often as possible. Whilst down in the town, they had their usual haunts, such as this coffee shop. Diarist 6 admitted that they were creatures of habit and did the same things in the same places quite a lot. Suggestive of a fairly set pattern of activities, this had changed somewhat, however, since her reconciliation with her daughter-in-law as this meant that they could have their granddaughter more frequently and so they had less time to go to their holiday home.

- *It is one of our favourite places in [seaside town] and we like to come here for coffee most W/E's we are here. It is a lovely relaxing place with wonderful views and we get a good cup of coffee!* d6w2r6

## People

Frequently it seemed that continuity of the people and/or activity are the elements more focussed on in the diaries. These did connect more fully with a sense of belonging. Within this section, I have focussed on the comments which demonstrated the value placed upon longer-term, seemingly more important social bonds in which the diarists invest effort, to enable those bonds to remain 'healthy' and constant. This includes their continued interaction with family and

friends who have either moved away, or were always long-distance relationships, and old work friends.

For Diarist 14, although her friend had moved to Australia, she still had regular contact with her. She valued this relationship and the long-standing bond it represented. This excerpt also demonstrated the forward-looking part of continuity as she was planning a future visit to her friend in Australia.

- *8.20 Phoned my friend who is returning to Australia on Saturday. Had a chat about our visit to the House of Cards 2wks ago. Thinking will be another 18/-2yrs till I see my friend again. We have known each other since age of 15 & we do have a laugh together* d14w1s6

For Diarist 13, there was a strong family bond which connected her to her family overseas, and as well as this strong sense of belonging, there was also a continuity about always ringing them on a certain day of the week. This felt like a lynch-pin activity and this fixed point in her occupational pattern was the starting point around which the rest of her weekend was built.

- *9.15 As it's Sunday we always ring our daughter in Australia. We see them on skype some days but today it's just a phone call. Really look forward to these chats. Our little granddaughter likes to answer the phone she is 3 and very cute. Miss them all very much.* d13w1s5

This excerpt from Diarist 9 was interesting, she developed a new friendship with a neighbour and this friendship extended out to her walking group. Diarist 9 had admitted that she was not always a gregarious person, but even though the American friend had returned and she now attends alone, her continued friendship meant that she had a point of social connection with the group members which was not there before. This was enhancing her experience of the walking group activity.

- *... it's my first walk since [Friend] returned to U.S. A new temporary neighbour in Flat 3 – she became an almost instant 'friend' – we found much in common + shared a mutually stimulating and supportive relationship – which might normally take a long time to develop. She came walking with me + the group adopted her + gave an extra social context here in [city]. It felt very strange going without her – but it was also good to be able to talk about her + pass on messages from her.* d9w2r1

Diarist 2's comments, regarding her attendance at a church service, previously included in the section regarding *religious activity*, (see one below), demonstrated a continuity of all three elements – place, people and activity, however as she chose to attend the ceremony time where she knew the other attendees it seemed that the people were very important. Also, this seemed to be a place and activity where she felt connected to the memory of her parents, which is part of the concept of belonging, i.e. that people are connected to their forebears as well as with the living [Hammell, 2014].

- *8.00 Service This is my family church – my parents were members for 66 years, so there are memories all around me in there. I have also been a member for most of my life. I do know the majority of people who come at that time, but can't say the same for other services.* d2w1s6

Similarly, the excerpt from Diarist 7, regarding his visits to the cemetery to look after his wife's grave, showed the same type of connection to the dead. Whilst this activity was attached to a very specific place it was very much about keeping a connection with the memory of his wife, who died three years before. The continued link with her was extremely important to him and showed in many of his diary entries – but most particularly in reflections on visiting her grave.

- *Also visit [cemetery], my wife's resting place, to attend flowers, respect her passing...[Wife's Name] – my wife- remembering – courting, marriage/family, pain & suffering. Good/bad times – a gal in a million that cannot be replaced* d7w1r7

## Activities

Within this section, I've picked out some excerpts which demonstrated that the diarists were engaging in regular activities, which had links for them to previous activities, or that they have engaged in for quite a while. These activities tended to be longstanding *Active Leisure* activities (including keep-fit and gym work, which is a slightly ambiguous inclusion in leisure as there is a *Health Must-do* aspect to it as well) and work, both voluntary and paid.

## Leisure

Diarist 9 experienced continuity through an activity she had engaged in since she was a girl, whilst at the same time enjoying the challenge, and the material this then gave her for future social interaction.

- *I have always enjoyed cinema, since childhood – I particularly like foreign + independent films. This is entertainment – but also stretches the brain a little + is good for conversations + feeling a little bit up to date and in touch* d9w1r1

Similarly, for Diarist 2, she experienced continuity through her keep-fit classes. She had danced since she was a little girl and had been attending this keep-fit to music class for approximately 30 years. She was now the oldest member of the group and proud of her continued involvement.

- *Keep fit... We move to all types of music on disc – so different than years ago when we had a pianist. The fact that I have danced since I was little has helped with co-ordination.* d2w1r3

Diarists 1 and 12, both continued to engage in active leisure in which they admit they are not especially talented. Diarist 1 appeared content with his lack of skill, however Diarist 12 practiced darts and played competitively, so was striving to improve. It appeared that these activities both offered continuity to the diarists, but of a different type of engagement, one relaxing without challenge and one with more challenge and higher level of social participation involved.

- *I'm not a good swimmer: no technique, and very slow, but I started swimming once a week a long time ago in [city], and I enjoy it. I like the feel of the water on my body, I relish turning around in it, floating on my back.* d1w2r2
- *I caught the bus to [town] to get to the [pub], the team I play for...The match consists of nine games six of which are singles and then three doubles. With a break between to have some food provided by the landlord... but I don't have any as I have had plenty earlier. Even though I've been playing league darts for many years I still get a little nervous before I play, especially if I know my opponent has beaten me on occasions in the past. I look forward to my Monday nights out.* d12w1r5

Diarist 11 had a leisure activity which involved a lot of investigation, both online and out in the community, into the history of the area in which she lived, and her family had lived for many years. She took photographs of old buildings in the local community, looked for old records and talked to people who were alive at that time. The whole activity was about a sense of continuity of place and people and was very personally meaningful to her.

- *10.45 Off to bed to re-read bits from Lark Rise to Candleford. My dose of nostalgia about a time when my grandparents lived & my village was full of characters portrayed in this book. I'm doing a record of words & pictures about life in my village in the 40s when I was growing up.* d11w1s1

### *Voluntary work*

Some of the voluntary work echoed the type of work the diarists did before retirement and sometimes kept them in contact with old colleagues. Diarist 8's excerpts show this most clearly and her charitable activities were very much tied to her pre-retirement occupation. She was a primary school teacher and post-retirement became part of a voluntary group taking four assemblies a year in 16 schools in the area, around religious themes, such as Easter. She found this very enjoyable, it was the connection with children which seemed to give her the most satisfaction, and being able to maintain this continuity was important to her.

- *10.20 Did whole school assembly about Easter. Chatted to friends on the staff. Lovely to be back at my old school to see staff & pupils – made very welcome.* d8w1s1

As with Diarist 3, her voluntary role also seemed to lead to further voluntary opportunities, such as the judging of the competition outlined in the excerpt below. She found this a very rewarding experience and was particularly impressed with the inclusivity exhibited within this school in relation to who could take part, as a little girl with Downs Syndrome was enabled to compete.

- *Honoured to be asked again this year to be a judge in 'Strictly Come Dancing'. Whole school took part, class by class. There were six of us on the judging panel which included myself, another retired member of staff and governors. Brought back many memories especially when the staff did a dance – the conga- ended up in a whole school conga!!!* d8w1r4

Her Sunday School role was always in place alongside her pre-retirement work, and so offered a lot of continuity and she still found this rewarding, as has been discussed in the section *Levels of Engagement, Enjoyment, and Flow* where *Productivity* was explored.

- *I still love to work with children and have taught Sunday School for 50years!!!*

d8w2r7

### *Work (paid) and maintaining pre-retirement links*

Regarding work, some of the diarist continued to engage in it and some diarists still engaged in activities related to their previous work, excerpts below demonstrate both situations.

As previously discussed, Diarist 17 does not believe in retirement and was still engaging in activities that interested her, in the same way as she always had, so has high levels of work-related continuity. She also tried to write articles so that she could get paid for them. She was struggling with this at times but was persevering and having some success.

- *Would like to give writing more prominence in my daily life – but I’m lazy and slow... Getting something written down on two different topics, two days running, felt good... I might try to stay at it for longer, another time – also (long-term) try to get back to more academic work. And poetry.*

d17w1r2

Diarist 9 seemed to have a ‘love-hate’ relationship with her work role, she was continuing to work post retirement and the two excerpts below explain the areas of continuity which she valued. This was in relation to the people who she worked with for years, alongside having her ‘continuity’ recognised by newer colleagues. This made her feel that she was making a real contribution in the setting and had high competence and relatedness. She was also able to choose which shift she did, within reason, so had some autonomy. Overall this suggests that this work role should have been good for her sense of well-being. However, there were times when she got disheartened by the visitors (being young, uninterested and disruptive), and she gave-up the role but then recommenced it a short time later. Possibly because she missed the boost it gave to her sense of well-being overall.

- *I still value the connection with this work – place and people. Being able to make a contribution + a depth of knowledge of the subject.*
- *I always enjoy seeing people I have worked with for some years + meeting new colleagues of which there are many now. I tend to be used as a ‘sounding board’ and ‘image elder’ – which is quite fun + morale boosting. A feeling of still having something to contribute.*

d9w1r5

d9w2r3

Below is an example from Diarist 1 of an activity related to his previous employment. He was still reading the Times Higher Education even though he retired some time ago. I suspect that several of the Diarists had small activities like this, which they had kept as a habit, however none of the others identified one directly

- *14.30 I returns from her volunteering; she settles with Guardian, I read THE. I’ve had a subscription for years, and still keep it up seven years into my retirement. I like to know what’s going on or wrong...*

d1w1s4

## Continuity and the future

When considering forward planning, as mentioned above, diarists' future plans linked to their current activities and relationships, and also maintaining connections to their past. Despite their age, and contrary to some theories around ageing (see Cumming and Henry, 1961), the Diarists also past planned well into the future, not just for the short term. Most of their looking forward was positive, but they did also consider a time when they might not be able to do what they could at that moment, with some trepidation, as discussed in the section on *Influences on Engagement – Ageing (Physical and Social)*. Some also looked forward practically to when they may need to go into a home, and how they or their family will deal with their property if their health deteriorates. Below these sub-subthemes: *short-term future*; *longer term planning*; and *practical considerations of the future* are explored with examples from the diaries where appropriate

### *Short term future*

Diarist 6 was planning for not only her own short-term future, but also her Aunts. She recognised that her Aunt was approaching her ninth decade and 'time is precious', she needed to spend time with her whilst she still could. Diarist 6 had a lot of other activities within her occupational pattern, but was making a commitment to amending this to include more time with her Aunt, who she valued highly.

- *10.30am Left home to go to visit [Aunt]. Called in at [supermarket] for some flowers to go with the vase I bought [Aunt] for her birthday and at [supermarket] to get some chocolates & biscuits. I want to spend more time with [Aunt] if possible. We have become closer since my mother died some 11 years ago and we enjoy each other's company. She is in her late 80's so time is precious* d6w1s6

Diarist 2 was now planning for her grandchildren's visit. She put a lot of effort into maintaining her links with her family, including her grandchildren, and so was delighted at the prospect of their visit. She acknowledged that they were hard work, and her second set of diary sheet began just after this visit, in which she talked about the work needed to put her house straight afterwards. She did not mind any of this, her need to maintain the strong familial bonds and her role within the family meant she was happy to engage in other activities to support this – so clearing up after they have gone home, replacing anything broken and returning any items left behind were approached from that perspective.

- *10.00 Bed. Just going to bed as I have had enough of today when the phone rings – it's my son to say I can have the two grandchildren to stay for a week in the summer. I didn't have them last year so now I can really start planning, instead of dreaming, about what we can do. This is going to be great, hard work and a great responsibility. I do love them. Ah well – sweet dreams instead of nightmares tonight...* d2w1s7

### *Longer term planning*

Some of the diarists mentioned plans for activities further into the future, for example, Diarist 13 was excited about her planned trip to Australia to visit her daughter and her family in a few



months' time. Similarly to Diarist 2, she made efforts to keep her family together despite how far apart they live, with regular weekly contact by phone or Skype. Along with the regular exchange of letters and photos.

- *1.00pm had lunch and was very pleased when the postman delivered some photos I was expecting. Our daughter lives in Australia and the photos were of our granddaughter, age 3 and the progress they've made on the garden of their bungalow. Really looking forward to our visit in September.* d13w1s1

*Diarists 14 and 8 were both planning trips in August. Diarist 14 was going to visit a close friend in London, so the trip was to engage in social participation at peer level, in that they will meet and talk together, as well as see a show. In the case of Diarist 8, she will be taking her family – husband, daughter, son-in-law, grandchildren with her, so was planning to draw her family to her for a planned, shared experience.*

- *7.30pm Tried to finish clearing kitchen. Phone rang again, my old friend phoned. Enjoy chatting to [Friend], we usually meet in London, probably will meet mid-Aug & plan to see a show* d14w1s2
- *9.00 Phoned owner of holiday villa in Spain to check availability for August. Glad to know dates for holiday still available owner is a friend of our friends, very pleasant and helpful.* d8w2s5

#### *Practical Consideration of the future*

Diarists 9 considered the future, which might include her being frailer than she currently was and what that might mean. She had a friend who she saw as a good role model for how to do this effectively, and acknowledged that this was especially important for her as she did not have any family to rely on.

- *In a way the 'good' part is that I do think about the future + what practical issues I might need to consider at some point sooner or later. [Friend] is so clear thinking + sensible about these matters – I do admire her spirit + intellect + feel that she demonstrates for me the way to look at growing older – especially when you have no family to discuss it with.* d9w2r2

Diarist 2, did have family who could offer support if she was to become frail in the future and needed to move into a home, or even die. She was mindful that in this circumstance she would not want to burden her son with too many possessions for him to clear out. She was a very supportive and protective mother, and worried about her son's future, trying to help where she could, so it is not surprising that she would think about this element of the future as well.

- *Yes I will call into the [Charity] shop whenever I have something which they can sell. Maybe I should have a clear-out more often. I buy very few knick-knacks as I know my son will not want to clear them out one of these days.* d2w2r8

## Conclusion

A close scrutiny of the data through a grounded theory approach led to a clear view of the diarists' occupational patterns over the maximum time span of 14 days spread out into two sets of 7 days. The themes and subthemes examined over the previous two chapters provided a thematic modelling of the occupational pattern, along with motivations and external influencing factors for the active older people who took part in the study. The consideration of this as a synthesised whole will begin the next chapter, with Figure 15 showing this in diagrammatic form, demonstrating also many linkages between the themes.

This consideration of the 'gestalt' of what older people do with their time and why, led to theorizing and to some conceptual modelling of occupational balance in the third age, as demonstrated by the older adults taking part in this diary study. The model may have generalisability or transferability to a consideration of other older people's lives, as it is not based upon an occupational pattern, linked to a particular 'type' of active older person. Rather, it is based upon the consideration of meaning, and motivation to engage in an occupational pattern. As discussed in chapter two, occupational balance could be considered as a universal concept, closely linked to the universality of occupation and its impact on survival and health (Wilcock and Hocking 2015), and so this could lead to a generalizable set of properties. There are limitations to this generalisability, especially as the participants are mainly from white collar, possibly more middle class, middle income social strata, and were of a Western Culture, living within that culture (so no issues of alienation).

It is also clear that some older people have less choice and control in relation to their occupational pattern and would not necessarily be able, therefore, to demonstrate these properties. Those with limited resources; disabilities; suffering from social isolation and loneliness, for example. However, those who are disabled or have other restrictions can, and do, rate their well-being and life-satisfaction as high, considering that they have aged successfully if they have some control over their everyday life (Bowling and Dieppe, 2005).

The next chapter will offer further discussion of the themes, the model arising from those themes, the relevance of this to occupational therapy practice and occupational science research, along with theoretical work and empirical research which offers a viewpoint around the subject. It will consider how this new way to consider occupational balance in the 'third age' could have therapeutic potential, which occupational therapists might harness if working within an occupational perspective of health, within a Public Health and Health Promotion arena.

## Chapter 6: Discussion and Conclusions on the Future for the Model

### Introduction

This chapter will discuss the proposed model of occupational balance in more detail, in relation to current literature and theory, considering its possible use in a therapeutic capacity, in conjunction with the reflective diary, as a self-assessment tool. It will then move on to discuss the efficacy of the reflective diary as a data collection tool in this study and its possible use in future research related to time use, and the attendant meanings associated with that time use, by different people.

### Towards a Conceptual model of Occupational Balance

Below is a diagrammatic representation of how all the themes and subthemes fit together (it was not possible to show sub-subthemes as it made the diagram unreadable) with many interconnections to each other shown. As mentioned in the introduction to the findings chapters, I consider the themes represent a 'gestalt' in so far as the elements cannot be viewed in isolation, they need to be seen as a whole to gain the full picture of complexity of the diarists' engagement in occupation, and the influences upon this. A gestalt can be defined as a '...symbolic configuration or pattern of elements so unified as a whole that its properties cannot be derived from a simple summation of its parts' (AHD, 2013 p1).

Whilst the themes have been discussed at a micro level of detail, to form the wider picture of what people do with their time, and what factors influence their choices, the themes needed to be synthesised together and the analysis zoomed out more to a meso-level to be able to take in the panorama. Figure 15 shows the synthesis of the themes and subthemes that arose from the data. These themes gave a full account of the activities the diarists engaged in, and what factors influenced the choices they made in relation to their range and pattern of activities. The diagram also includes linkages between the themes and subthemes, with arrows to emphasise the direction of influence within the different connections, which have been drawn out by the analysis.





Drawing on the themes and subthemes emerging from the data, enabled a theoretical process of envisioning the properties that are important to the makeup of the diarists' occupational balance, considering the pattern, meaning of and motivations for the diarists' doing. Once these properties were generated, it was possible to construct the proposed model of occupational balance for older people and consider its impact on their lives from an occupational perspective. The properties of occupational balance for active older people which emerged from the six themes of analysis presented in the previous two chapters are: social relatedness/connectivity; enjoyment; autonomy; planning of occupational pattern; physical activity; challenge; competence; and life-tense perspective. These will now be considered in detail, related to current literature as appropriate.

## Model of Occupational Balance in the 'third age'

### Introduction

Occupational balance can be viewed as the scaffolding which gives people's lives structure and meaning. Having drawn the eight properties from the themes and data, before discussing them further I will firstly draw them into a proposed definition of occupational balance which informs the following discussion.

### Occupational Balance for active older people

Specifically, in relation to active older people and the model developed from the data:

Occupational Balance is a multifaceted concept, which requires the subjective evaluation of their own occupational pattern by an individual, to consider whether the occupational experiences engaged in, as a panorama, provide a state of favourable balance of certain properties on a set of continuums, relating to meaning and motivations as well as actual engagement. Occupational Balance is dynamical; with all continuums in a state of possible flux across time. For people in the third age, it is proposed that these properties are: social relatedness; enjoyment; autonomy; planning of occupational pattern; physical activity; challenge; competence; and life-tense perspective.

### Properties of the Model of Occupational Balance

The eight properties of occupational balance for active older people will now be discussed in more detail, in turn there is firstly a there is a brief description of the property and how it linked to the themes in the analysis and then further discussion of the properties, either singularly or grouped, depending on the direction of the discussion.

#### 1. *Social relatedness/connectivity:*

*this linked mainly to three areas in the analysis of diaries which were: who they engaged in activities with; who they did things for; and where their focus for social occupation was – towards the community, or more towards home and close social bonds.*

In relation to meaning, the diarists demonstrated that **social relatedness/ connectivity** activities were important to them, as occupations, to enable them to maintain their position within the family, peer or community group to which they belonged (AOTA, 2014). This was also important as a motivator to engage in other activities to support their social participation, for example: going to the shops to buy birthday cards for relatives; buying books to read to children; making cards; baking. Other types of occupations to support social participation at a community or family level, revolved around ensuring they would be at their best for the planned occupation. These would include planning in restful or less demanding occupations before or after a big social night out or a day looking after their grandchildren. Alongside this, it appeared that continuity of social participation was also important, including for example: keeping up with work friends when retired; and keeping engaged in leisure pursuits with certain groups of people. The diarists also demonstrated their continuity of social participation through linking the past with the present, particularly in relation to family. An example of this was Diarist 1 ensuring that his granddaughter was in contact with her French heritage by speaking to her in French and talking to her about her mother, who had died.

Reciprocity was an important part of the picture regarding drivers of the occupational pattern for a person and how it takes shape. Diarists seemed to ensure that there was a reciprocal balance of doing for others – so that a person engaged in an activity for the benefit of another person, and in return that person engaged in something for the benefit of the first person and so on, see for example Diarist 2's interaction with her neighbours – the husband put up shelves for her, and she offered support to the wife and child whilst he is away for work. Reciprocity is suggested to be the 'social glue' (Wedekind and Braithwaite, 2002, p. 1014) that binds relationships, and so is another way that social relatedness/connectivity is a motivator for engagement. Social obligation, in general, is suggested to be related to reciprocity. Becker (2014) states that reciprocity 'fixes the outline of our nonvoluntary social obligation... [that we] acquire without regard to our invitation, consent or acceptance' (p. 3). For example, the following of social rules and norms, sometimes seen as the 'obligations of citizenship' are reciprocity at work (Becker, 2014, p. 73). The diaries suggest there was an obligatory nature to some reciprocity activities, but this only appeared to be obligatory because diarists wanted to maintain their levels of social participation; along with their identity; and projection of self through action, which is also termed their 'occupational identity' (Kielhofner, 2008, p. 106). These activities may not, therefore, all fall within the non-voluntary type of social obligation, although Becker (2014) suggests that some reciprocity at a family level could be this.

Also, certainly at a peer and community level, diarists demonstrated that sometimes they engaged in community level activities which demonstrated political and ethical viewpoints, or in

some other way made a statement about who they are. It gave an outward demonstration of their occupational identity which they wanted to portray within their community – such as what charity events they attended; charities they donated to; community shops they frequented. Also, types of social activities they engaged in could be another way for them to portray aspects of themselves, for example, they could be wanting to overtly demonstrate their vitality by engaging in very active social pursuits.

Taylor, Pan and Kielhofner (2017) note that for an older person to have a positive occupational identity they need to have challenging and satisfying occupation in their life, so it may not all be about projecting an image of competence and vitality when engaging in active social pursuits, but also about affirming this for their own feelings of self-esteem. Vrkljan and Polgar (2007) noted that the loss of driving for an older driver led to an identity crisis, as driving cessation meant that he had difficulty getting to activities in the community in which he previously engaged, such as those which maintained his roles as husband and grandfather. They suggest that people in this situation need to ‘reconstruct their occupational identity through occupational adaptation’ (p. 35) to ensure that they can continue to have a meaningful occupational pattern. Also, as O’Brien and Kielhofner (2017) state, people become what they do – engaging in an active social occupation keeps a person active, physically and socially, something of which the diarists were very aware.

As social participation is supported by many and varied, sometimes non-social activities, it can be an instigator of, as well as a category of occupation, as viewed by the AOTA (2014). It is a significant influence on occupational balance and the property **social relatedness/connectivity** portrays this, the diarists designed their occupational patterns to include what was, for them, the right amount of community, peer and family level social participation, along with the necessary activities to support this participation, and the relaxing, less demanding occupations that surround an important social event, to support their participation.

## 2. *Enjoyment:*

*This emerged as a significant influence on engagement in doing. Enjoyment is linked, within the literature, to well-being - both hedonistic and eudaimonic (Deci and Ryan, 2008; Ryan and Deci, 2001). This should not be under-estimated as an important motivator to engagement in a range of occupations. It relates to the influences on engagement in doing; elements of doing; planning, pacing and pausing; and continuity and belonging themes.*

The property of ‘**Enjoyment**’ in the model is something which the diarists alluded to frequently in their descriptions of the occupations in which they engaged. Enjoyment was not often mentioned in relation to self-care, except when taking a bath to relax after a stressful day. Also, the occupations they regarded as ‘must dos’, discussed in relation to ‘**Autonomy**’, are not



denoted as enjoyable. As many theorists equate well-being to happiness (Waterman, Schwartz and Conti, 2008; Ryan and Deci, 2001; Waterman, 1993), it suggests that an occupational pattern including activities which provide pleasant experiences will impact upon well-being. A subjective evaluation by an older person regarding how much enjoyment was present within their occupational pattern and if this was acceptable would link to subjective well-being. Håkansson, Dahlin-Ivanoff and Sonn (2006), researching balance from an occupational perspective, suggested that experiences of balance depend upon the person's 'perception of a pleasurable arrangement or combination of parts' and that well-being 'seems to be the outcome of balance in everyday life.' (p. 79) This links to the previously discussed concept of occupational spin-off, where the participation in an enjoyable and challenging occupation can encourage more occupational engagement and engagement in a broader range of occupations, as the person looks to increase their positive experiences (Leufstadius, Eklund and Erlandsson, 2009; Farnworth, 2004; Rebeiro and Cook, 1999).

### 3. *Autonomy:*

*This is about meaning choice and control, not necessarily independence. It can relate to interdependence and engagement in co-occupations, if this enables choice and control. It relates to the themes of influence on engagement in doing, elements of planning, pacing and pausing and continuity and belonging.*

In relation to the element '**Autonomy**', this acknowledges that not everything the diarists included within their occupational pattern was considered by them as being entirely of their own choice. Within the activities that diarists considered 'must dos' were those such as housework, gardening (for those who did not view it positively as a leisure pursuit), and house maintenance. Although self-care, such as bathing, showering, teeth cleaning was done daily and could have been viewed that way, none of the diarists seemed to suggest that they were. Another area of 'must do' related more to social relationships and was the duty visits to friends and relatives in hospital and other such duties – taking birthday cards around to forgotten friends; flowers to people just out of hospital; getting shopping for an elderly mother. As discussed earlier, these were only 'must dos' because the diarists valued the social relationship with that person and so were willing to do what is necessary to maintain it. There was, alongside this, something more in-built, as some of the people being visited by the diarists had illnesses which meant they either were unable to acknowledge the visit or would not remember that it has taken place. In this circumstance, although the diarists acknowledged that they found the visits uncomfortable and, in some instances, even dreaded them, they still considered it their duty to go. This seemed to not just about their loyalty to a friend, but also about projecting the type of person they were through their actions, their occupational identity (Laliberte Rudman and Dennhardt, 2008). Alongside this was also the 'fear factor', as one diarist

put it, - 'it could be me some day'. They hoped there would be friends to visit them at that point.

#### 4. *Planning of occupational pattern:*

*This links to the theme elements of planning, pacing and pausing in the main. It is about considerations of how set their pattern of activities were, how much room for spontaneity there was, how much the occupational pattern was used manage stamina and ability to engage.*

The diarists demonstrated **planning of occupational pattern** for the future, as well as for their current life balance. Most of their future planning was positive, such as visiting family in Australia, or meeting friends in London. There was also some consideration of a time when they might not be able to engage in occupations as they currently could, some also planned for when they might have to downsize their property or move into a home and had thought about how their belongings would be dealt with. There were comments from them about not wanting to become old, but it appeared that these comments were more about not wanting to become ill, or not to be unable to continue to engage in the things they wanted to do, rather than in a chronological aging process. Jonsson, Borell and Sadlo (2000) noted in their longitudinal study of retirement that some older people drifted into a slower pace of life post retirement, taking longer over self-care and leisure activities, suggesting some pacing was occurring, which the participants were not even fully aware of doing. The participants had plans to engage in voluntary work post-retirement, however at the point of 2 years post retirement had not yet fulfilled these plans, Jonsson, Borell and Sadlo (2000) suggest that this is partly due to the slower pace of life leaving them less free time to engage in other activities. They also noted that none of their participants were making plans more than a year in advance, showing a less future facing view of old age in Swedish elders just past retirement age. These elders did share the diarists' urge to maintain their health and engaged in activities specifically to protect this, such as walking, 'aerobics and cross-country running'. (Jonsson, Borell and Sadlo, 2000, p. 33)

Another point to consider in relation to planning is what occupations drive the process. As flow experiences are something that a person would like to repeat as a source of intrinsic reward (Csikszentmihalyi, 2002), this could suggest that daily living would be planned to allow as much engagement in these as possible. Meaning the high flow activities would be built into the routine fabric of everyday life, possibly within an occupational pattern with enough flexibility to allow for spontaneous 'extra' engagement in flow activities as well, meaning these activities would drive the '**Planning of Occupational Pattern**' element of the model. Some diarists recognised that they had an occupation as the 'peg', or lynch-pin, around which the rest of their time is organised and it gave a focus to their lives. Wright-St Clair (2012) similarly found, in her

small phenomenological study that older people has one occupation which was of 'primary importance' (p. 44) to them. Jonsson and Persson (2006) noted, however, that too much flow can be very draining, hence relaxing as well as flowing and exacting experiences are included in their theory, and why the diarists demonstrated pausing and pacing within their occupational pattern. Some of which was regularly planned in, and some more ad-hoc, in response to a high energy expenditure preceding it or acknowledged as preparation for an up-coming event.

#### 5. *Physical activity:*

*All the diarists felt it important to continue to be as active as possible within their physical capabilities, and that by doing so felt they were protecting their current level of participation too. This mainly related to elements of doing; social participation; influences on engagement, but planning was involved and there was a context for this too, so it connects with all the themes to an extent, as does challenge and competence to some degree.*

#### 6. *Challenge:*

*Most of the diarists had occupations across the range from*

- *challenging – into which they had to put effort, try new skills and so forth,*
- to
- *more relaxing ones which did not require much mental or physical effort, and afforded them moments to restore their mental and physical capacity.*

#### 7. *Competence:*

*Alternatively, this could be termed personal satisfaction with performance. Several of the diarists rated their performance in activities and whilst the pressure of the surrounding social context and feedback was important, their own feelings of competence in engagement was paramount.*

The three properties '**Physical Activity**', '**Challenge**' and '**Competence**', can be related directly to flow theory and to the Jonsson and Persson (2006) experiential way of viewing occupational balance based upon it. The Jonsson and Persson (2006) model had three dimensions to it. The first of the three dimensions, *Exacting experiences* of everyday occupation, describes high challenge that cannot be matched with high skills, so occupations which exceed the person's level of skill (HNME). These experiences are necessary sources of personal development and can trigger new flow experiences as the dynamic process continues. The second dimension, *Flowing experiences* of everyday occupation, describes highly and/or moderately challenging experiences that are matched with high skills (HME). Flowing experiences are a source of intrinsic rewards and feelings of competence. The third dimension, *Calming experiences* of everyday occupation, describes low to moderate challenges that do not require high skills, so experiences of relaxation,

boredom or apathy (LCE) (Jonsson and Persson, 2006). Some calming experiences are needed to recharge people's batteries and for purposes of relaxation.

The most obvious 'fit' of this theory to the properties of the current modelling of occupational balance is with the '**Challenge**' property. This includes activities which range from 'challenging' to 'relaxing'. This property seems to incorporate the three dimensions of Jonsson and Persson's (2006) model. The challenge could be such that it is exacting, flowing or at the other end of the range, relaxing. It could also be said that some of the activities engaged in are physically active as part of the challenge, rather than purely a mental challenge and so will impact upon the element, '**Physical Activity**', of the model. However, being sedentary does not necessarily mean that there is no challenge. The definition of sedentary behaviour is 'any waking activity characterized by an energy expenditure  $\leq 1.5$  metabolic equivalents and a sitting or reclining posture. In general, this means that any time a person is sitting or lying down, they are engaging in sedentary behaviour.' (Sedentary Behaviour Research Network, 2012, p. 540). They could, however, be engaged in a mentally challenging activity, such as learning a new language or writing their memoirs whilst reclined. The diarists engaged in activities across the spectrum here, and engaged in activities purely for physical challenge and conversely purely for mental challenge, as well as those which required both. The level of '**Competence**', or satisfaction with performance the person feels when engaging in an activity will feed into the level of '**Challenge**' the activity engenders in them, again linking with the Jonsson and Persson (2006) model of occupational balance. The qualities of and satisfaction with doing themes within the analysis demonstrated this linkage.

Schkade and Schultz (1992) posit that occupational adaptation is also required to ensure continued satisfying and satisfactory participation in the activities of daily life. They suggest that

*occupation provides the means by which human beings adapt to changing needs and conditions, and the desire to participate in occupation is the intrinsic motivational force leading to adaptation* (Schkade and Schultz, 1992, p. 829)

The process of occupational adaptation is normative and most obvious when there is a time of transition, such as retirement, loss of a spouse, onset of a health condition. The theory is that people react in times of transition through a process of generating, evaluating and then integrating responses to occupational challenges into their occupational performance; how they will approach that occupation, in future, has changed; and the successful approach used in that occupational experience may be applied to other relevant situations and re-evaluated for relevance/fit. The evaluation process, i.e. self-perceived level of relative mastery provides evaluation of social acceptance and personal satisfaction with performance, which impacts upon a person's sense of well-being (Schultz and Schkade, 1992). There are many examples where the

diarists reflected upon their performance of certain occupations, in terms of how satisfactory they found their performance for themselves and for their social environment, see for example Diarist 5's discussion of his bowling, or Diarist 13's discussion of his darts ability. In Diarist 5's case, he also acknowledged that he took up bowling having reflected upon his current health status and deciding that this was the best fit, his adaptation process had probably taken him through to evaluation on previous sports involvement, and not found a satisfactory level of performance. At this point he decided to try something new which, whilst still active, was a better fit for his physical health.

#### *8. Life-tense perspective:*

*A sense of how connected they are to the past whilst still engaging. Having continuity and a sense of forward momentum in their lives was a factor in how the diarists discussed their activities, how they wrote about them in the diaries and how content they appeared to be with how their life was. This related most fully to continuity and belonging; elements of planning, pacing and pausing, and social participation and sociability.*

Continuity has been mentioned above in relation to social participation, however the theme of continuity and belonging related to more than this. The diarists referred to continuity around engagement in the same or similar activities across the life span, living and/or taking part in activities in the same locations as well as maintaining relationships with people over time. Belonging relates to a sense of being valued; socially included; and connected to social, cultural and physical elements of living (Hammell, 2014). Within the model of occupational balance for active older people, the property **life-tense perspective** clearly relates to this part of the analysis of the diaries. It is noted by Nelson and Jepson-Thomas (2003) that the occupations a person has engaged in up to their current point inform what they do now – it enables them to adapt to new situations (or not) and to be effective in their current doing, so developing a sense of relative mastery (Schkade and Schultz, 1992).

Continuity of occupation, and the associated competence from long term engagement, also informs who they are in terms of what they want to project to the community, their peer set, or to their family, so their occupational identity. By having links to the past, and congruence in terms of occupational pattern, alongside continuity into the future, the diarists exhibit what Hammell (2009b, p. 111) terms 'life coherence'.

In relation to future planning, there are theories around ageing which suggest a curtailment of engagement and future-planning as people get older, such as that proposed by Cumming and Henry (1961) as discussed in chapter two. None of the diarists exhibited the wish to reduce the total amount they did, or stop forward planning. By meeting the inclusion criteria, the diarists identified themselves as active older people. They demonstrated that they were active in the

community and within their families, and even the oldest of them did not seem to have reduced their range of activity as a consequence of any social or cultural restrictions. It was noticeable from their profiles that most of them had continued with the same leisure-type activities post-retirement as prior to this, and some had continued with productive, voluntary or paid occupations in fields similar to those in which they had worked. Their feelings of competence and identity would be greatly increased by this continuity across their transition into retirement. There were certain things that they wished to give up, or do less of, but there was no suggestion that this was related to the ageing process, more to an occupational imbalance, which they wanted to redress by changing the content of their occupational pattern. This seems to gel more with Atchley's (1989) Continuity theory which, as discussed, describes a process not dissimilar to that of occupational adaptation in terms of how people choose what they engage in as they grow older. A newer theory, Harmonious Ageing, is an even better fit with occupational adaptation theory (Schkade and Schultz, 1992a) and suggests that if old age was seen 'as a life stage that embraces both continuity and change, older people would define their meanings of life in terms of its own opportunities (e.g. spiritual growth) and challenges (e.g. physical change)' (Liang and Luo, 2012, p. 332). Harmonious Ageing allows for a spectrum of approaches to old age, unique to each individual, and is defined as 'a balanced outlook toward old age – following the natural laws of one's body...cultivating a sense of harmony...and gaining the wisdom of handling challenges and thus making adaptations accordingly' (Liang and Luo, 2012, p. 332). This idea of adapting to challenges at an individual level is demonstrated by the participants in research into what the oldest old do with their time, where they did not give up activities they had enjoyed across previous lifecycles stages, unless illness or other external factor leaves no alternative (Wright-St Clair, 2012; Kronl f and Sonn, 2005) they just firstly looked towards engaging at a reduced level. Likewise, some of the diarists mentioned doing things less frequently, for less time or to less intensity.

## Developing Continuums for the Model of Occupational Balance

Another way of exploring this model of occupational balance for active older people, and its relevance to occupational therapy, is to consider its congruence with Wilcock's formula,  $D+B^3=SH$ . The  $D+B^3$  elements of the Wilcock (2006) formula are *Doing*, plus *Being*, *Becoming* and *Belonging* which together constitute occupation. These are all necessary to humans' *Survival* and *Health* (SH), because of the occupational nature of humans (Wilcock and Hocking, 2015). Wilcock considers that occupation is as necessary to people as food and drink, and advocates an occupational perspective of health (Wilcock, 2006). The manner in which this formula is used to describe occupation, suggests that it is really a term which defines occupation as a global concept, rather than at an individual activity level, therefore it extrapolates well to a consideration of occupational balance; where occupational balance is not only the pattern of doing within a person's life but also the meaning and motivations a person has for engaging in their particular pattern, i.e. properties consistent with the  $B^3$  part of the Wilcock equation. Wilcock suggested that a dynamic balance between doing and being is central to healthy living and the becoming dimension is dependent upon both (Wilcock, 2007).

Hammell (2009b) suggested her tentative experienced based categories of occupation, could be used with Wilcock's (2007) dimensions of occupation to evaluate occupational balance. Wilcock (2007) clearly considers meanings integral to the concept of occupation, alongside the doing. Therefore, Hammell's (2009b) categories are not sufficient on their own to evaluate occupational balance because they do not consider the meanings and motivations behind the doing. In contrast, the properties of my Model of Occupational Balance in the 'third age', relate closely to Wilcock's (2007) dimensions of occupation –  $D+B^3$ . Doing, being, belonging and becoming are all accounted for within the model's eight properties, suggesting that this model could represent occupational balance for active older people, and be used to evaluate it, in research and possibly in a therapeutic context.

As discussed in chapter 2, previous research noted four factors which interacted dynamically, resulting either in a state of balance or overload in the participants' everyday lives (Håkansson, Dahlin-Ivanoff and Sonn, 2006). The participants, women with a previous history of stress related illness, were moving backwards and forwards on a continuum between balance and overload, dependent on the interplay of these factors, and when not balanced, their sense of well-being was negatively affected (Håkansson, Dahlin-Ivanoff and Sonn, 2006). The properties of the Model of Occupational Balance in the 'third age' could also be regarded as interacting dynamically. For participants to keep their occupational balance satisfying, there would be the need for constant 'fine tuning'. There were examples within the diaries when activities did not go as planned, e.g. the activity took longer, a person did not turn up, it rained, the car wouldn't start, a class was cancelled. When this happened, the older person needed to adapt their activity pattern to

accommodate these changes, whether they were big or small, permanent or transitory. Changes could be viewed as impacting upon any of the eight properties of occupational balance, for example Diarist 14 had to look after her husband who had an eye operation, which seemed to be impacting upon her **social relatedness/connectivity** and **autonomy** and led to her feeling trapped and unable to do what she wanted to do. It also impacted upon her **competence** as she acknowledged that she was not a good nurse. This was transitory, so she knew there was an end in sight but noted in her diary how unsettled and unsatisfactory she found the situation. If this had been a more long-term situation, then she would have needed to adapt to the circumstances and change what she could within her pattern of occupations to ensure a more satisfactory state of balance was achieved.

Considering this further, if these properties signify occupational balance for older people, then empowering older people to manage their patterns of occupation with these considerations in mind could be of great benefit. There is research which shows that older people transition into retirement and do best when retired, if they are in control of their circumstances and feel they are exercising choice and control (Pettican and Prior, 2011; Hewitt, Howie and Feldman, 2010). According to Wilcock (2007), the 'doing' dimension of a person's life is dependent upon having 'being' time, during which meanings can be understood, sense made of things, ideas formed and plans formulated. Regular time needs to be built into people's patterns for 'stillness and reflection'. This could be as an important function of the model of occupational balance – as a tool to support 'being'. It could provide a clear structure for a person to review and reflect upon their occupational balance. Several authors, when conducting research with older people transitioning into retirement and beyond, have noted the importance of reflection and planning to ensure that the transitions of older life go smoothly, positive changes are maintained and adaptations are made as needed to ensure a continued 'good life' (Pettican and Prior, 2011; Hewitt, Howie and Feldman, 2010; Jonsson, Kielhofner and Borell, 1997).

To that end I have extrapolated the properties of occupational balance in the third age into continuums, on which older people could consider their current occupational lives and if they were in a satisfactory state of balance or otherwise. The ability to 'manage' the pattern of occupational engagement towards the aim of satisfactory occupational balance, within the continuums, could lead to a sense of well-being, considered from both the eudemonic and hedonistic viewpoints. The diaries of this group of older people had many examples of how management of their occupations enhanced their sense of well-being, suggesting that a conscious review of balance for older people, especially at transition times in their lives, could be beneficial. The elements of the occupational balance model, viewed on continuums, seem to offer a way for older people to gauge if their current occupational balance is satisfactory or if adjustments need



to be made to it. The difference between the continuums associated with this model and the continuums from previous research (Håkansson, Dahlin-Ivanoff and Sonn, 2006) is that the far points of the continuums are not ranged from positive to negative (except perhaps, enjoyment). They are ranges which demonstrate the lack of homogeneity in relation to how older people live their lives. Where on any one of the continuums a person would feel most comfortable is something only the individual themselves could evaluate.

Figure 16, below, shows the 11 continuums developed from the properties of the model. Regarding how the 11 continuums relate to the eight properties, the first property, **social relatedness/connectivity** could not be captured in one continuum, for this property there are three. This encapsulates the areas within the diaries as related to social participation: who they were engaging in occupations for; who with; and what their overall preferred level of social connectivity looks like. Also, for the property **planning of occupational pattern**, there are two continuums to capture the level of routine within their pattern, and the amount of pacing it includes which demonstrated itself to be of some importance for the diarists.

It was possible to use diarists' writings to theorise the main properties they made subjective evaluations about, in relation to their day to day living. Occupation is considered a universal need for people regardless of culture, and considering occupational balance to be more about how people construct a daily pattern of occupations to meet their needs for meaning, acceptance, challenge and continuity over time could also suggest universality, especially when viewed as an ever-moving balance of properties, and not a division of time between certain categories of occupation. It may be possible to further consider whether these are universal for a particular set of people – in this case active older people. There are valid limitations to making these assumptions, which have been discussed in the limitations section of Chapter 3, but bearing these cautions in mind, I propose these 11 continuums as the main ones that those in the third age would need to review in relation to their occupational balance and how well it was meeting their needs.

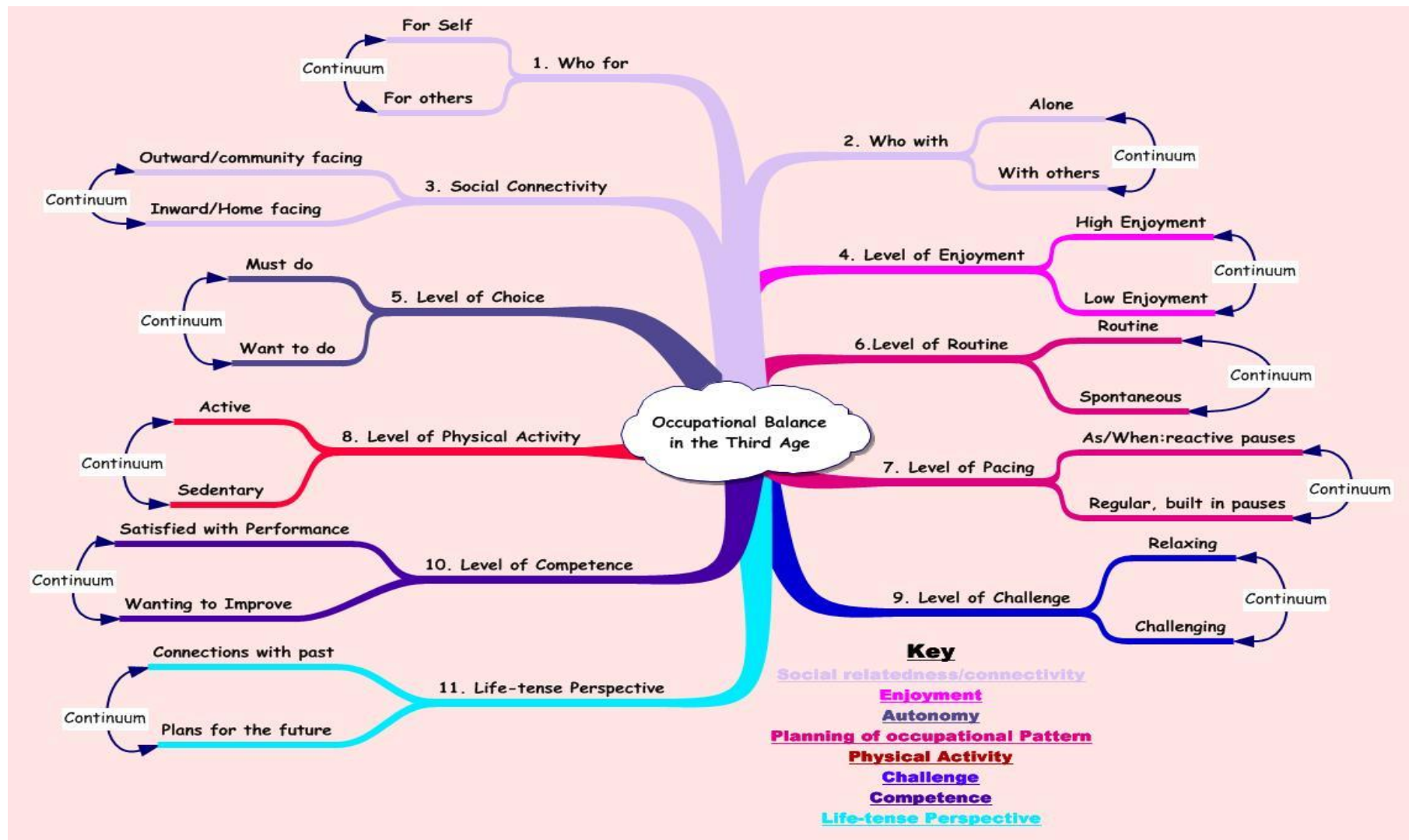


Figure 16: Continuums of the Model of Occupational Balance

The properties, and therefore the continuums, are drawn from the analysis of the data and do not relate to individual activities but to *the pattern or landscape of their activities as a whole*. An evaluation of 'who for' on the continuum would not be in relation to a single occupation, it would be a subjective review of how they experienced their engagement in its entirety. When considering 'level of challenge', it would be reflecting whether they had more challenging or more relaxing activities when considering the panorama of their lives, and whether that was the right level for them. Any individual would rate their balance of the different properties of occupational balance differently as it is an entirely subjective assessment, and it would not be possible, and I would maintain not desirable, to suggest an ideal balance that people should aspire to. This synthesis sits within a qualitative, constructivist perspective and concludes that only the person themselves can really convey what occupational balance is for them. Viewing the properties of the model as continuums can allow for a subjective evaluation by an active older person of their activity patterns; motivations; and other factors influencing this. This could enable a reflection on how satisfactory they find their current balance of occupations in meeting their needs, in terms of providing active engagement, relatedness, meaning and motivation to aspire, i.e. D+B<sup>3</sup> (Wilcock, 2007).

### The Continuums and Doing, Being, Belonging and Becoming

Considering the Model of Occupational Balance in the Third Age in relation to Wilcock's (2007) depiction of occupation (as doing, being belonging and becoming), all the continuums relate directly to the doing dimension. They are a person's individual reflection about their actual occupational experiences (as per Pierce, 2001a) and of whether their pattern of doing is satisfactory to them when viewed through the lens of the model.

Being can be viewed as the quiet, personal rather than social, time in a person's pattern of occupations where they reflect upon their doing, it 'embraces the thoughtful and restful facets of occupation', and also includes sleep (Wilcock and Hocking, 2015). In terms of individual elements, looking at the 'Who with' / 'Level of Challenge' / 'Level of Pacing' / 'Level of Physical Activity' continuums would be suggestive of whether the 'being' time upon which the 'doing' dimensions of a person's life are dependent are incorporated (Wilcock, 2007).

Alongside the reflective component of this dimension, Being can also be the sense of who someone is as an occupational and human being, therefore so it is the expression of their occupational and self-identity (Laliberte Rudman and Dennhardt, 2008). Their identity in the now is very much dependent upon their past experience of occupational engagement, and how connected they are to this previous occupational pattern and the social networks it generated. This would link to the **life-tense perspective** and **social connectivity** continuums. There needs to be a sense of life coherence (Hammell, 2009b) where links to the past, engagement in the present

and plans for the future all have congruency with each other where this is desirable. If the past holds painful or unhealthy forms of occupational engagement, then it could be suggested that links to these occupations need to be reconsidered, so that future engagement does not include similar issues. An interesting example in relation to older people is those living in prisons who have reached retirement age and are either remaining in prison or being released.

There is research regarding the difficulties these older people have relating their previous occupational patterns (both prior to and during their incarceration) to what they may do if they are being released, how they will live, how they will access support and so on (Forsyth *et al.*, 2015). This lack of congruence is an extremely difficult position for them. It can lead to reoffending to facilitate a return to prison, enabling them to reengage with their role as offender, if there are not strong enough alternatives outside the prison walls; they are also at greater risk than younger prisoners of committing suicide within the prison setting (Barry *et al.*, 2017) or upon release (Forsyth *et al.*, 2015).

Those who reach retirement age in prison, find that there is not always age appropriate alternative activity for them to engage in instead of work and find this impacts upon their sense of self and well-being (Baidawi, Trotter and O'Connor, 2016; Mann, 2012). This example is clearly around Being but also around the dimension of Belonging, as the lack of social networks outside of the prison walls makes it very difficult for them to reintegrate and start to live within the community successfully (Forsyth *et al.*, 2015), and the lack of age appropriate activity inside prevents needs relating to competence, as well as autonomy which is already compromised in a prison setting (Mann, 2012), to be fully met (Baidawi, Trotter and O'Connor, 2016)

Belonging is the dimension of occupation which acknowledges the importance of the sense of connectedness to other people, places, cultures, communities and times (Wilcock 2007). This last point, about temporal context, links to the part of the occupational balance model considering the person's **life-tense perspective**, so the feeling that there is an acceptable balance between 'connections to the past' vs. 'plans for the future' within their current pattern of doing. Belonging also clearly connects to the continuum considering their level of **social relatedness**: how outward facing they are toward community and wider social participation compared to how inward facing towards home and family; does where they are on that continuum feel right to them. A sense of reciprocity, mutuality and sharing also characterise the belonging dimension of occupation, which can be positive or negative. This then suggests that the components of the occupational balance model which consider doing for other people ('who for' continuum) as well as doing with others ('who with' continuum) are part of a sense of belonging and suggests that belonging within a supportive social network can underpin the ability to do and contribute to the meaningfulness of doing (Hammell, 2014). Furthermore, within a consideration of 'who for' and 'who with', the

diarists wrote about belonging to certain social groups to engage in certain activities with – often activities they are carried out for many years, so ‘continuity of belonging’ is something which certainly is important to several of the diarists in relation to their social doing, and sometimes their productive doing. This relates to level of **competence**, as well as **life-tense perspective** and **social relatedness**, as continuity of engagement is likely to ensure greater skill levels and greater feelings of competence. Some of the diarists also talk about their belonging in terms of places, such as home or church, saying that they had lived in a house for all their married life, or gone to a church (building) all their life, so suggesting that they are ageing in place which might or might not be good for their sense of well-being (Johansson *et al.*, 2013; Shank and Cutchin, 2010), and will influence their evaluation of their balance on several of the continuums.

In relation to Becoming, this dimension is about the forward momentum in someone’s occupational performance and identity and their planned life-course narrative (Wilcock and Hocking, 2015; Hammell, 2014; Hammell, 2009b). In a process of Becoming, a person will learn, develop and adapt to life experiences, both in the direction they have planned and where they need to re-evaluate and plan due to unexpected events. ‘Regular modifications and revisions of goals and aspirations help to maintain momentum in becoming, as does the opportunity to experience new or novel situations and challenges’ (Hitch, Pépin and Stagnitti, 2014a, p. 242). Whilst some theorists suggest that there is not that forward momentum for older people (see Cumming and Henry, 1961 for the most enduring and contested theory around disengagement), more current research (Clark *et al.*, 2012) has refuted this and the WHO agenda around Healthy Ageing certainly encourages an alternative view (WHO, 2017).

The diarists in this study demonstrated, in every case, that they were forward looking and planning towards future goals. There are several clear links to *Becoming* in the occupational balance model, such as the **life-tense perspective** property which suggests that older people need to consider how satisfied they are with the balance they have on a continuum between connections to the past and plans for the future. In relation to goal planning, properties of the **planning of their occupational pattern** across time; **challenge; enjoyment; and social relatedness**, and the related continuums, which are about learning and developing and would need to feature and be part of the forward momentum felt by the person within their occupational balance. The diarists demonstrated this forward momentum in their planning and excited expectation that their lives still had ‘Becoming’ to do – they had not yet fulfilled all their plans and aspirations.

Figure 17 shows the Model of Occupational Balance, properties and continuums linked to Wilcock’s (2007) dimensions of occupation. This shows in diagrammatic form the relationships discussed above. It demonstrates that the model does fully integrate with the dimensions of

occupation and could therefore be used to evaluate an active older person's occupational balance. This is a tool derived from this research with a group of older people not in contact with traditional occupational therapy services. Its congruence with one of the occupational therapy profession's most current way of understanding occupation, and its divergence from the traditional way of viewing occupational balance i.e. as time divided between different categories of occupation, meets the challenge from some members of the profession to consider more research and experienced based notions. Wilcock and Hocking (2015) also strongly urge the profession to move into the realm of health promotion and use an occupational perspective of health to meet the needs of sections of the population. As I am suggesting that this model could enable active older people to evaluate their occupational balance at times of transition, such as into retirement, this is moving away from interventions with people with health conditions per se. However, this model may well be applicable to older people who have reached a transition in their lives requiring a re-evaluation of their occupational pattern due to illness or injury.

Working with older people in the community within Health Promotion is a current area of occupational therapy research and some practice. The next section will consider what this model and the continuums might add to this arena and how it might be practically applied. This will include consideration of the reflective diary and its efficacy in enabling an older person to reflect.

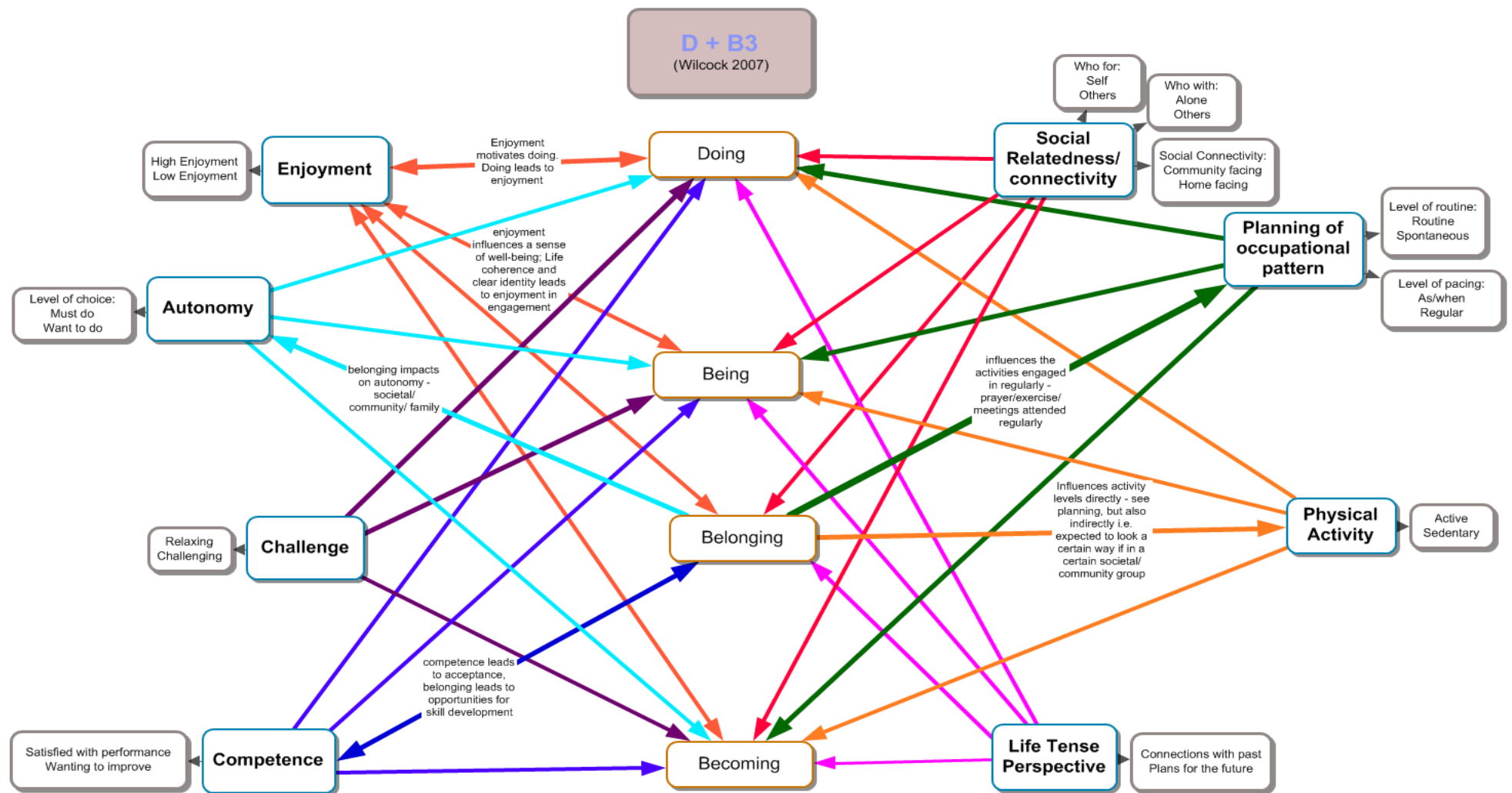


Figure 17: Congruence of the continuums with D+B<sup>3</sup> (Wilcock, 2007)

## The model and health promotion

The model and continuums provide a new way to conceptualise what could be important to active older people in terms of their occupational life and identity, which moves away from the traditional notion of looking at occupational balance purely in terms of their pattern of engagement in self-care, productivity and leisure. Considering this from a more nuanced, experienced-based conceptual foundation would enable occupational therapists to have more meaningful conversations with clients about their occupational balance and how their current pattern of activities is impacting on their sense of health and well-being.

The Model of Occupational Balance for active older people could be used as a tool to support 'being', giving a structure for an active older person to review and reflect upon their occupational balance. The importance of reflection and planning, to ensure that the transitions of older life go smoothly; positive changes are maintained; and adaptations are made as needed to ensure a continued 'good life', has been noted when conducting research with older people transitioning into retirement and beyond (Pettican and Prior, 2011). Moffatt and Heaven (2017) found that the idea of planning for retirement is culturally embedded in the UK, however, the focus was more on finances than on maintaining or creating a post-retirement identity and shaping a post-working life. The actual reality of planning of either element was less evident than the notion in most older people's experience.

Moffatt and Heaven's (2017) research suggested that an emphasis on preparing for what the person would do on exit from the workplace was an essential element to ensure a good transition into retirement. They suggest, however, that retirees 'may benefit from assistance to reflect on 'core resources' within their control (e.g. maintaining family relationships)' (Moffatt and Heaven, 2017, p. 893), instead of planning specific activity patterns which might be difficult to enact exactly as planned due to circumstances beyond their control – something the model of occupational balance for active older people would support. The participants in their study conceptualised this as dealing with uncertainties, which seemed at odds with the way that retirement planning, offered mainly by employers, was formulated (Moffatt and Heaven, 2017). This does suggest that there could be a role for the model and continuums of occupational balance in the third age to assist older people to review their priorities for retirement and start to think through their transition towards this. Especially as this could be a longer-term transitional process with higher retirement ages and the different retirement patterns now evident in the UK.

## Older People and an Occupational Perspective of Health

As discussed in chapter two, authors such as Wilcock have called for occupational therapists to move into the field of Health Promotion for many years (see Wilcock 1999b). The new model of occupational balance for active older people could be a tool to assist occupational therapists to



work with a Health Promotion population with an Occupational Perspective of Health (OPH) (Wilcock and Hocking, 2015).

To consider this further, I have first briefly reviewed some current Health Promotion options for working with older people, within an occupational perspective.

### Well Elderly Studies

Clark *et al.* (2012; 1997), conducted two Well Elderly Research Studies in the US, which used a randomised control trial format to evaluate the effectiveness of preventative occupational therapy. This intervention (Lifestyle Redesign®) was constructed to give older people the tools to 'manage' their life, redesigning areas which needed attention, so that their occupational patterns worked for them. The findings of this were that, compared to the participants assigned to control groups, 'the elders who received occupational therapy exhibited greater gains (or fewer declines) in physical health, physical functioning, social functioning, vitality, mental health and life satisfaction' (Jackson *et al.*, 1998, p. 327), all the gains were statistically significant, demonstrating the benefits of an occupational perspective of health and its application to 'lifestyle redesign' (Clark *et al.*, 2012 p. 782).

They also identified, within this programme, that meaning in relation to occupational experience was 'a key component of successful aging' (Jackson *et al.*, 1998, p. 328), along with the ability to be reflective, so that older people 'could begin to imagine and subsequently enact, healthy occupational lives as they aged' (Jackson *et al.*, 1998, p. 329). The second study, the Well Elderly 2 Randomised Control Trial (Clark *et al.*, 2012), specifically chose its participants from 'ethnically diverse elders in community base settings' (p. 782), achieving similar results in terms of impact on physical and mental well-being.

Mountain *et al.* (2008) replicated the well elderly study as 'Lifestyle Matters', on a smaller scale in the UK. The study found that occupation-based intervention led to increased feelings of confidence within the participants and to the ability for some of them to challenge limiting social factors, such as family not wanting them to do too much or take any risks as they got older. She identified the social environment, families and friends, as possibly colluding with the cultural ageism which sets barriers for older people regarding what is, or is not, appropriate for them to do. This then feeds into a spiral of disengagement as the older person starts to 'agree' that they are now too old to continue to... The Lifestyle Matters intervention was designed to move older people outside of their possibly diminished routines, or to prevent them entering the negative spiral which could lead to reduced occupational engagement (Mountain and Craig, 2011). The results, both qualitatively and quantitatively, demonstrated that there was a role for culturally sensitive occupation-based intervention for older people to enhance their life satisfaction, level of engagement and mental well-being (Mountain and Craig, 2011).

Clark *et al.* (2012) evaluated the cost-effectiveness of their intervention in the Well-Elderly Study II, using a 'cost per quality-adjusted life year (cost per QALY)' (p. 784). In both studies, the intervention was demonstrated to be cost-effective<sup>6</sup>. The significant benefits found from both the Well Elderly Studies (Clark *et al.*, 2012; Clark *et al.*, 1997) included increased vitality, general health, physical functioning, social functioning and general mental health, with 90% of gains retained after 6-months. Mountain and Craig (2011) identified that the gains in confidence, level of activity and well-being for the older people in her smaller scale project 'appeared to warrant the investment necessary for population-based evaluation' (p. 48), and that future trials would need to add a cost effectiveness evaluation (Mountain *et al.*, 2008), (especially if run over 8 months again as the QALY was likely to be higher than £25,000).

The main reason that these programmes were successful seems to have been the occupational perspective, alongside the client-centred approach. The older people engaged in the studies were first educated in theories of occupation, such as balance and flow, and then were encouraged to reflect on and analyse their current occupational identity and engagement in an occupational analysis book. This involved a written process of diarising and journaling about occupations, their new knowledge about occupation, themselves and their environment and to consider how to ensure they were engaging in meaningful and healthful (from their viewpoint) activities daily (Jackson *et al.*, 2009). Having a self-written analysis was expected to aid long term memory of their understanding of the link between occupation and well-being, and maintain occupational patterns responsive adaptively to change (Jackson *et al.*, 1998). The overall purpose of the intervention programmes from an occupational perspective was:

*to help the elders improve the amount of self-identified balance amongst their occupations, to heighten their flexibility in choosing occupations, and to promote their use of overt planning and strategizing to achieve health through occupation*

(Jackson *et al.*, 1998, p. 333)

and it was clear that occupational therapists' contribution to health promotion is through the profession's focus on the benefits of occupation, which can have lasting therapeutic impact on health and well-being (Clark *et al.*, 2012).

The National Institute for Health and Care Excellence (NICE) (2016; 2015) Mental wellbeing and independence pathway in older people suggests that intervention with older people, both at

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<sup>6</sup> Clark *et al.* (2012) converted the costing to UK setting data, and the cost per QALY was £24,868. A QALY considers the recipient's quality of life and length of life they will gain due to the intervention, NICE (2013) consider costings of less than £20,000 per QALY as cost effective. For those between £20,000 and £30,000 per QALY, more justification and consideration of social and other non-health related factors important to the wider public health sector is needed for evaluating the cost effectiveness (NICE, 2013; NICE, 2012). This could include things such as social capital gained by more community focussed older adults, involved in volunteering activities; intergenerational integration; or economic value of older people being out in the local community spending money.

group and individual level, should be undertaken by people who are educated on occupational therapy principles, by at least involving occupational therapists in the design and development. This is interesting as Mountain *et al.* (2017) and Chatters *et al.* (2017) report on a UK RCT based on the Lifestyle Matters intervention, reduced to 4-months and undertaken solely by band 4 staff, who were trained by occupational therapists in how to undertake the group and individual work. The study found no difference in health and well-being markers between the intervention and control groups at the 6-month point (Mountain *et al.*, 2017). At 24-months there were significant improvements in the intervention group in the areas of emotional and social loneliness, which Mountain *et al.* (2017) suggest could show that the groups assisted participants to review their social participation and social networks. The lack of immediate impact of the intervention was contradictory to the previous studies (Clark *et al.*, 2012; Mountain *et al.*, 2008; Clark *et al.*, 1997), and could be attributed to: the reduced length of the time (reduced by 50% from Mountain *et al.*, 2008); not using qualified occupational therapists; the health levels of the participants at the beginning of the study being too high; and the recruitment methods.

In relation to the use of non-occupational therapists running the groups, despite the supervision by occupational therapists, the band 4 staff would not have the significant skill set around group-work, activity-analysis, grading and adaptation to individual needs of a qualified occupational therapist (Chatters *et al.*, 2017), and a reduced ability to take a fully OPH. One statistic, low up-take (4.1%) of the one to one sessions on offer, suggests this was a factor (Mountain *et al.*, 2017). These were sessions where goal setting and individual needs were considered. Without relevant skills, it would be more difficult to fully utilise this time to build rapport and affirm the strengths, needs and goals of the participants, reducing the benefit.

Overall, Chatters *et al.* (2017) felt that the issue of 'inability to identify those at risk of mental decline appears to be a prime reason' (p. 8) for the results which contradict earlier studies' findings of strong positive impact on health, well-being and occupational reflexivity (Clark *et al.*, 2012; Mountain *et al.*, 2008; Clark *et al.*, 1997). Chatters *et al.* (2017) also noted that participants seemed to gain most from the intervention if they were at a transition point in their lives, demanding change, for example: having had a bereavement; developed a disability; or moved home. In that circumstance they could see how their ability to adapt their occupations to meet the challenges they were facing had been improved by the intervention. However, most participants in the study were not at a 'trigger point' (Chatters *et al.*, 2017, p. 9)

The reason for discussing this well-known occupational therapy intervention strategy in some detail is that it is the only strand of published, researched health promotion intervention in relation to active, well older people, and includes within it a self-analytical component. The older person, themselves, is equipped with tools to evaluate their current lifestyle and occupations

panoramically. It has been shown to work best with older people who are at imminent risk of decline, meaning an impoverished occupational pattern, including reduced social participation, leading to greater isolation, and poorer mental and physical health (Clark *et al.*, 2012; Mountain *et al.*, 2008; Clark *et al.*, 1997). This suggests that for older people not at imminent risk of decline, but who may benefit from OPH intervention in how to adapt to transitions, trigger-points and changes in their occupational pattern as they age, an alternative strategy could work.

Of note, as well, although qualitative data suggests that the participants enjoyed the groups over the four months (Chatters *et al.*, 2017), when given the opportunity to continue these groups after the intervention finished, none of them did. This is again contrary to the findings of the earlier study by Mountain *et al.* (2008), where the two groups continued to run after the study as the participants found the peer support invaluable in enabling them to counteract some of the impact of social and cultural contexts upon their occupational engagement, affording them valuable, lasting, social connections (Mountain *et al.*, 2008). This suggests that older people with fuller, active occupational patterns (which may, however, need review to ensure that it is an optimal configuration), might not need a group setting in which to address this.

### Other OPH intervention with older adults

Looking at other health promotion interventions, which could be used with an occupational perspective, there is the Decisional Balance Sheet (Geller *et al.*, 2012); the 'What Now?' Workbook (Taylor and Jones, 2017); and well-being focussed therapeutic diaries (Alexander, McAllister and Brien, 2016). I will briefly discuss these as they are also interventions requiring individuals to engage in reflection and review, linked with either individual or group intervention, and have had some success.

#### *Decisional Balance Sheet*

The decisional balance sheet was adapted for use to promote two healthy behaviours (physical activity and fruit and vegetable consumption) in older adults. It was considered efficient and effective as it improved the physical activity levels of both groups, and the fruit and vegetable consumption of the physical activity group. It achieved these results with minimal staff training and input, and low participant demand. The findings are in line with previous studies which showed that if a person adopts one healthy behaviour, they are up to five-times more likely to adopt further healthy behaviours (Johnson *et al.*, 2008). This relatively inexpensive intervention, where participants were asked to reflect upon personal and social consequences of engagement in different occupational behaviours had some success in encouraging adaptation and change (Geller *et al.*, 2012).

### *'What Now' workbook*

This was designed for individuals experiencing disruption of identity following a traumatic event or illness. As occupations contribute to identity construction, a tool to aid exploration of the 'unique meanings of a particular occupation to an individual could be of value in helping to re-establish a positive way forward.' (Taylor and Jones, 2017, p. 440) This workbook asks the client to focus in on one meaningful occupation and work through a reflective process in relation to this. This can be repeated for as many further occupations as the client wants. In the research project, the value to people trialling it was that it provided a way for them to look at what makes that activity meaningful to them, how it can be adapted in times of change, or they can find activities with similar meaning to replace it, if they can no longer engage in it. The link between reflection and forward planning elements was the important aspect, and led to the title of the workbook – 'What Now?'. The idea being that this reflective process could help them to preserve or rebuild identity after disruption (Taylor and Jones, 2017).

### *Diary as a therapeutic tool*

Alexander, McAllister and Brien (2016) suggest diary use as a recovery-orientated therapeutic medium. Regular diary writing has been shown to facilitate acceptance and adaptation, and in developing reflective writing skills. It can involve 'higher order thinking, such as contemplation, pattern finding and analysis' (Alexander, McAllister and Brien, 2016, p. 21), allowing the diarist to gain new insights and perspectives through reflection. Whilst the main thrust of the article is in relation to therapeutic use in the mental health setting, the description of its qualities suggest that it would be equally useful with an occupational perspective, for an older person to use to reflect upon their occupational patterns and balance – either for only themselves to view or for use as part of a therapeutic intervention process.

### The new model of occupational balance as a therapeutic tool

Considering the model of occupation balance in the third age derived from this study, and the attendant continuums (see Figure 16) in the light of this discussion of interventions currently available, it seems that it could offer a useful tool to use with older people who do not need a full Lifestyle Redesign® inspired intervention. These active older people could benefit from some preventative health promotion input, with an occupational perspective, equipping them with tools to help ameliorate the impact of this life transitions. They could then have been using these for some time in relation to smaller issues, making adaptation to larger more traumatic transitions, such as the death of their life partner, easier to accomplish.

It could be timely to introduce a tool to older people at the point of retirement, or even prior to this, as it has been shown that active retirement planning leads to successful transition into retirement, and that individualised, community-based retirement planning is more supportive than formal pre-retirement programmes, frequently offered by employers (Moffatt and Heaven, 2017; Hewitt, Howie and Feldman, 2010).

Exactly how the model and continuums could be deployed to best advantage is an area for further study, however, my first thoughts are that an active older person would need to keep a reflective diary, including the in-depth sheet for a set period. There would then provide enough material for the older person to be able to situate themselves on the model continuums and decide if the position on each of those continuums was optimal for them. If not, then there could be some individualised therapy input to assist them in ‘rearranging’ their occupational pattern to include experiences which enabled them to achieve a satisfactory state of occupational balance. The importance of keeping the reflective diary in this process, including the in-depth sheets, relates to the idea of developing reflective skills and using higher order thinking (see above discussion re: Alexander, McAllister and Brien, 2016). The in-depth sheet is based upon the Gibb’s (1988) reflective cycle, which similarly to the ‘What Now’ workbook asks for a reflection on the occupation as it was performed and what will be changed/done differently next time – the forward-looking part of the process.

The purpose for including this as well as the actual diary sheet within this study, was to encourage a deeper level of reflection on at least one occupation a day, and to enable the development of reflexivity within the diarists. It would achieve the same aim if used as part of an intervention process. Writing about an activity not only allows reflection on it, it helps the person to contextualise and situate it with the fabric of their life. This can then help an evaluation of its relative benefit/deficit relationship when considered alongside the rest of their occupational pattern. Considering points such as:

- Does that pattern afford the individual with the level of the different properties they, as an active older person, reflect upon as the constitution of satisfactory occupational balance?
- If not, do they value the activity; the activity context; or the outcome – tangible or intangible – enough to consider ways to adapt that activity? How would they do this so that the occupational experience can provide more or less of the properties they have identified as relevant?
- How will they go about making that adaptation, for example: by practice; altering the environment; changing the desired outcome; or grading the activity so skills can gradually improve? These considerations would form part of the individualised intervention experience for the older person, but the medium for that intervention is another area for further research. It could be as a self-reflective part of a face to face individual or group intervention process, self-help work-book package, with telephone or face to face support, or it could be part of a telephone, or even Skype, group process.

## Research Implications

### Occupational Balance

As mentioned above, the development of a model of occupational balance in the third age, with contingent continuums needs further research, in terms of how it could be deployed therapeutically.

There are also some further areas for research in relation to the model itself, which fall into four main areas. Firstly, in relation to the claimed universality of the concept – this is difficult to attest to without further exploration with a more culturally diverse set of participants. Secondly, similarly to the first point, whilst this is a model of balance for active older people, or those in the ‘third age’, it would be interesting to engage in research around its applicability to those older people who are frailer and perhaps could be viewed as being more in the ‘fourth age’ (Laslett, 1996).

Thirdly, research into an area of population health might be advanced with this model. For those whose life situation means that attaining some of the requirements to experience doing, being, belonging and becoming are curtailed, what does this model signify? ‘Doing, being, belonging and becoming in accordance with people’s occupation-based species’ nature is biologically normative of human populations...population health; physical, mental and social well-being and the absence of illness are dependent on occupation’ (Wilcock and Hocking 2015, p. 360). Research is needed to investigate if groups of older people in the UK are unable to engage in an occupational pattern which affords them occupational balance due to their sociocultural environment, and the impact of this. If some older people are in the position where they cannot employ their occupations in a

pattern to meet their needs, and so are in a state of occupational imbalance, this would be occupational injustice through occupational deprivation, alienation or marginalization (Wilcock and Townsend, 2014). This would need to be addressed if a wider cross-section of older people in the UK were to be empowered to achieved active or healthy ageing as advocated by the World Health Organisation (WHO, 2017; WHO, 2015; WHO, 2002)

A final area of research relating to the model are the possible links to hedonistic and eudaimonic well-being and how adjustments to the model continuums impact upon the experiential qualities of well-being. A substantial amount of research into both forms of well-being are expressed and experienced as activity based, i.e. asking participants how they feel about what they are doing (see for example: Waterman, Schwartz and Conti, 2008; Waterman, 1993), strongly supporting the occupational science viewpoint that it is through doing that people experience eudaimonia and/or hedonia, i.e. well-being (Wilcock and Hocking, 2015).

### Reflective Diaries

As well as the inclusion of reflective diaries in any intervention strategy and the study thereof, I would also like to discuss the use of this type of diary as a qualitative data collection tool. In chapter three, I explained the reasons for choosing this data collection tool, and gave a summary of different options which could have been used. Here I consider some practicalities of using the Reflective Diary format in qualitative studies.

In my opinion, having completed a pilot and now a full study, the Reflective Diary, as designed for this project, is a viable option when considering a qualitative data collection tool. It is especially a useful tool for researching occupational science topics, such as occupational balance. What is important to note about this Reflective Diary is the 'two-pronged approach'. Alongside the main reflective diary, which has a column for thoughts and feelings (see Appendix 3), the participants engaged in an in-depth reflective process in relation to at least one occupation a day (see Appendix 4). This enabled the diarists to build their reflective skills as the project progressed. Reflecting is not an easy process for everyone to engage in and, without this added reflective process, it would have been too easy for the participants to become minimal in their diary entries, treating it purely as a process of describing their time use.

Another point to consider is participant Fatigue, time-use studies often only ask for data relating to one or two days to reduce this. However, if the research needs richness and depth to the responses, then a diary would need to be kept for longer, so that the diarists can get into their 'reflective stride' and provide more in-depth data. In this study, three diarists only kept the diary for the first seven days, which was an attrition rate of only 11% in terms of diary sheets completed, one person was too unwell to complete the second week and the other two found it too much work.



Also, mode of completion needs some thought. The commitment of keeping a reflective diary must be acknowledged upfront, but there could be formats in which would make it easier to complete. For example, one of diarists in this study typed and emailed the sheets to me. The diarists were offered the option of audiotaping the diaries, no one did in this study. Whatever the media, it is important that the participants feel connected to the responses they give and do not get into a 'tick-box' mentality with it. This might interfere with the reflective processes.

It has been noted that writing causes cognitive changes and health benefits, particularly this has been found in relation to writing about traumatic experiences. The most benefits are achieved if the event is described and *then* feelings about it expressed (Pennebaker and Graybeal, 2001). This is not dissimilar to reflective writing models such as Gibbs (1988) where an experience (possibly not traumatic) is described; then thoughts and feelings; followed by analysing what worked and what did not; and planning what will be done differently in future. It is conceivably the potential cognitive adaptation which makes the data collected so rich. This indicates that when choosing alternative media for providing diaries, it should be an option which allows for this creativity.

Another consideration when collecting data through this medium is the relationship between the researcher and the diarist. As the study progresses, the diarist's attitude towards the recipient of the diary begins to evolve. If the study requires face to face meetings further into the study, there can be a noticeable difference in how the diarist interacts with the researcher, more warmth and familiarity, and the diaries are clearly written with the recipient in mind. This is not due to any action on the part of the researcher, other than requiring the diarist to write the diary. However, the diarist is writing about their life, the researcher has taken an interest and they appear to see this as a social bond. This makes clear the social constructivist nature of knowledge, even though the researcher is not present, their existence makes a difference to how the diarist expresses themselves about their own lives.

One note of caution - for people who are in situations where they have little control over the occupations in which they engage, the reflective process could bring up some negative emotions and reflections, and might therefore need some tailoring to be effective in gathering their thoughts and feelings sensitively. The relationship with the researcher could be used to good advantage here, to allow the diarist to feel comfortable to discuss their circumstances.

## Conclusion

To conclude this thesis, I have presented a constructivist grounded theory research study, using a reflective diary to examine occupational balance for active older people. A conceptual model of occupational balance has been theorised following an in-depth analysis of what the active older people engaged in this research project did with their time and why, over a period of up to fourteen days. Figure 15 (p. 179) gives a diagrammatic representation of the themes arising from the data, and Figure 16 (p. 192) a diagrammatic representation of the model of occupational balance for active older people, including the attendant continuums. Together these diagrams represent the heart of the research study as Figure 16 provides a clear picture of the emergent, grounded theory in relation to what constitutes occupational balance for this group of older people, whilst Figure 15 gives a rounded view of the factors influencing their engagement in occupation.

How this model links to Wilcock's (2007) consideration of occupation's four dimensions,  $D+B^3$  has been explored, see Figure 17, and gives credence to the idea that the model can be used as tool to assess occupational balance, when considered as a broad view of their occupational engagement (D) and attendant meanings ( $B^3$ ) in a temporal pattern. Further, how this model and the continuums could be used in occupational therapy practice and areas for further research related to the model have been suggested.

Finally, consideration has been given to the reflective diary as a standalone, qualitative research data collection tool when researching occupational therapy and science concepts such as occupational balance.

## New Knowledge Contribution

The new definition and conceptualisation of occupational balance *for older people*, drawn from research *with older people*, is a thought provoking addition to the occupational therapy and wider gerontology knowledge base. Notwithstanding the study limitations this model provides a new way of viewing occupation and occupation balance for active older people. Whilst heterogeneous and dependent upon their unique circumstances, the research proposes a set of universal properties to self-assess against. This could move occupational therapy into the health promotion arena, with a client group able to manage their healthy ageing process supported with occupational therapy tools and interventions based on the model generated in this project. This could provide a more cost-effective approach to intervention, useful for older people not in need of the more intensive intervention provided through 'well elderly' programmes.

Word count: 88861

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## Appendices

### Appendix 1: Participant Information Sheet



#### **PARTICIPANT INFORMATION SHEET FOR RESEARCH PROJECT:**

##### **Occupational Balance in the Third Age -**

My name is Elaine Hall. I am the researcher on a project entitled 'Occupational Balance in the Third Age - conceptualisation and relationship to Quality of Life'. This project is sponsored by the University of the West of England, and has been approved by the Faculty of Health and Social Care Ethics Committee.

Thank you considering being part of this project. Before you decide if you are going to participate it is important that you understand why the research is being done and what it will involve, which is why I have provided you with this information sheet. You have two weeks to decide if you want to be involved. This gives you the opportunity and time to read this sheet and consider it carefully before making your decision. I can be contacted on this telephone number 0117 3288781 or email address [Elaine3.Hall@uwe.ac.uk](mailto:Elaine3.Hall@uwe.ac.uk) if you have any further questions or worries.

##### **What is the purpose of the study?**

This study will examine older people's occupations (what they do with their time) using a diary. It will also gather information on why people engage in the things that they do.

##### **Why have I been invited to participate?**

You have been asked to participate in this study because you have retired and are eligible to receive a pension (this does not mean you cannot be engaging in paid or unpaid work post retirement) and consider yourself to be independent in your daily life activities. I will be asking around twenty people who meet these criteria to complete the diaries.

##### **Do I have to take part?**

The decision on whether or not to take part is entirely in your hands. If you do decide to take part you will need to sign the attached consent form, you will then need to send these back to me in the envelope provided. If you do decide to take part you are free to withdraw at any time without giving a reason.

**What will happen if I take part?**

I will arrange to either visit you at a time that is convenient to you and provide you with the reflective diary or post the information to you. I will go through in detail how to complete the diary and you will have the opportunity to ask questions about the process (in person or by telephone). You will be asked to keep the diary for fourteen days in total, in two 7 day batches. During this period I am available by telephone to answer any questions that you have. At the end of the first 7 days you will be asked return the completed diary sheets in the envelope provided. I will start to analyse this data and will contact you after approximately 2 weeks to ask you to start keeping the diary for the second 7 days. I will visit at the end of the second batch to collect the diary sheets or provide you with further envelopes to post them back. If you would like a copy of the completed diary I will copy it and send it to you.

**What are the possible benefits of taking part?**

The benefits of taking part are that you will help to improve the understanding of older people in this society and what is important to them. Also by taking part in this research you will have the opportunity to examine and reflect upon the balance of activities in your life.

**Are there any possible problems with taking part?**

Taking part in this research project takes a reasonable amount of time commitment on your part, as you will be asked to keep the reflective diary for fourteen days. This could become a bit of a chore.

**Will my information be kept confidential?**

Most definitely. All information collected in this research project will be kept confidential. The data will be stored in a locked filing cabinet and password protected computer files which only I will have access to. Excerpts of your diary may be made part of the final research report, presented at conferences or included in journal articles, but under no circumstances will your name or identifying characteristics be included in this report.

**What will happen to the results of the research study?**

This research is being carried out as part of a PhD study. I will prepare a summary report of the results of this study, ensuring anonymity, to give to all participants. I will also explain what will be done with those results, for example if any journal articles will be written from the results etc.

**If you wish to take part in this study, please return a copy of the signed and dated consent form in the prepaid envelope provided.**

## Appendix 2: Covering Letter Sent to Participants with Diary



University of the  
West of England

Bristol BS16 1DD  
Telephone +44 (0)117 32 88534  
www.uwe.ac.uk

Dear

Thank you so much for agreeing to take part in this diary study, looking at what older people do with their time and how this influences their quality of life.

Please find enclosed the diary, which has instructions located at the front. If, when you have read these, you have any queries please don't hesitate to contact me. I can answer any queries by phone or we can arrange a meeting to go through it if that would be easier.

What the study entails is for you to firstly complete 7 consecutive days of diary sheets and in-depth reflections and post these to me in the envelopes provided. When you send in these documents, please can you also send in the 'background information sheet' located in the first section of the diary? Following this, I will contact you to request the second 7 days of diary keeping – normally around 4 weeks later. Again when you have completed the 7 days, please post the diary and in-depth sheets back to me in the envelopes provided.

My contact numbers are on the instruction sheet in the diary and alternatively my email address is [Elaine3.Hall@uwe.ac.uk](mailto:Elaine3.Hall@uwe.ac.uk). Please note, if you would rather completed your diary sheets on the computer I can email you online versions of the forms and if you would rather use a Dictaphone I can supply one of these.

Yours sincerely

Elaine Hall  
Senior Lecturer  
UWE, Bristol

Enc.

**bettertogether**

University of the West of England, Bristol  
Vice-Chancellor Professor Steven West

## Appendix 3: Reflective Diary Sheet

Diarist No \_\_\_\_\_

Day No \_\_\_\_\_

Diary Time Sheet No \_\_\_\_\_

[illegible]

## Appendix 4: In-depth Sheet

Diarist No \_\_\_\_\_

Day No \_\_\_\_\_

Reflective Sheet No \_\_\_\_\_

Activity for reflection:	
<b>Describe</b> it: include details of what you did, who else was there, where you did it. Do you do it regularly, if so how often, why do you keep doing it?	
<b>Feelings:</b> What were you feeling and thinking at the time you were doing it? What do you think about it in relation to the rest of the things you do and why did you choose to reflect upon it today?	
<b>Worthwhile:</b> What was good about the experience and what was bad about the experience?	
<b>Plans?</b> Did the activity go as planned? Did you do everything you intended to? What would you do differently next time?	

## Appendix 5: Background Information Sheet

Diarist No \_\_\_\_

### Background Information Sheet

Please complete these general information questions at the start of the research project.

<b>1. Age</b>		<b>2. Sex</b>	
<b>3. Marital Status</b>			
<b>4. Do you have any medical conditions or other issues which impact on what you do with your time?</b> Please note: you do not have to give details of what these are if you don't want to – just indicate that there are some physical or other restrictions			
<b>5. What work did you do before retirement?</b>			
<b>6. Are the types of activities you engage in for pleasure similar to before you reached retirement age? Please give some examples.</b>			

## Appendix 6: Sample Redacted Completed Diary Sheets

Diarist No \_\_\_\_\_

Day No 7

Diary Time Sheet No \_\_\_\_\_

Time	Description	Thoughts and Reflections
8.30	Woke up - a bit stiff as predicted - lazy start - breakfast etc, papers from yesterday -	I can't decide if it's satisfying or wearying that I feel the effects of the class!
10.30	Walked into town - returned tavelers to B.H.S. Onto MTS to collect some Euros + ferry for car/fair suiter	I love living in town again + feel pure pleasure at being able to walk into town (5 min) + Potter.
12.50	Home again for coffee + papers then lunch.	
2.00	Prepared a casserole + pudding for supper.	I quite enjoy cooking - even for just myself - but only try new recipes for guests.
3.00	Showered + washed hair	
3.30	Ironing + packing suitcase for Amsterdam	
5.30	Found euros - after long search.	
6.00	████ came + I showed her around and told her all about the car.	
7.30	████ arrived - I finished cooking -	
8.00	Supper	
9.30	Relaxed and chatted - █████ left.	
10.00	I tidied up - █████ started her prep for teaching practice tomorrow -	
11.30	Went to bed.	
		Increasing anxiety as holiday gets nearer - if someone said I didn't have to go - I'd be happy. But once I'm on my way - I'll find + enjoy a new place. Very pleased that █████ who is lively, is keen to stay here + look after car - when I'm away is funny. I ended up helping █████ prepare phonics + measurement lessons for tomorrow. I'm amazed how <del>the</del> different it all is - from just 10 yrs ago. Glad to mind buzzing re: what I might forget for trip!



2nd week

Diarist No 2 wk 2

Day No 1

Diary Time Sheet No 1

Time	Description	Thoughts and Reflections
7.00	Quick shower and cup of tea before walking to Church for 8am Communion	First time I have been for some weeks as I had my two Grandchildren to stay one week and last Sunday it was local Gardeners' Society trip. What a pity no balloons from The Fiesta around this morning - let's hope they fly tonight, both for the pilots and the people who have gone to [redacted] to watch them.
10.00	Jumped in car to deliver 80th birthday card. [redacted]'s birthday was announced in Church today.	Felt awful I hadn't sent a card. I have known [redacted] all my life. Both our families have had connections for nearly 100 years.
12.00	Out to lunch to celebrate my neighbours 94th birthday.	Went to hotel in [redacted]. Although not terribly busy, the atmosphere was pleasant, food and service good.
2.30	Drive to [redacted]	Decided to finish the occasion with a drive to [redacted] to view [redacted] Park Gardens. They were up to usual standard - well worth a visit.
4.00	House tidying start.	There is so much to be cleared up and put away - will make a start.
4.30	Blind - bedroom.	So pleased to see a neighbour arrive to fix blind I bought some time ago. Some weeks ago he tried to fix it but didn't have the right drill. People in our Close are kind and



Diary No \_\_\_\_\_

Day No 1

In-Depth Sheet No \_\_\_\_\_

Activity:	CINEMA
<b>Describe</b> it: include details of what you did, who else was there, where you did it. Do you do it regularly, if so how often, why do you keep doing it?	Met [redacted] at Little Cinema [redacted] to see 'Le Quattro Volte'! We do this often - whenever there's a film we want to see - so have a regular fixed day. [redacted] + I share the interest - enjoy doing this together - also I also go on my own.
<b>Feelings:</b> What were you feeling and thinking at the time you were doing it? What do you think about it in relation to the rest of the things you do and why did you choose to reflect upon it today?	I was a bit late getting there, so [redacted] was already in + seated. I have always enjoyed cinema since childhood - I particularly like foreign + independent films. This is entertaining - but also stretches the brain a little + is good for conversations + feeling a little bit up to date and in touch. Delightful, unusual film - very slow + thoughtful - it allowed me to slow down + focus on small things.
<b>Worthwhile:</b> What was good about the experience and what was bad about the experience?	Being late was a nuisance - because I then had to go straight off to chiropractic + had no chance to really talk to [redacted]. I don't like zipping in and out like that - I like to reflect on what we've seen + also finding out what is happening to [redacted]. I feel a bit churlish. But loved the film.
<b>Plans:</b> Did the activity go as planned? Did you do everything you intended to? What would you do differently next time?	Nearly apart from lack of time. There is no need for that - my week is largely my own - so I was a bit cross with myself. I would allow more time!

## Appendix 7 Sample of entries in occupation definition table constructed during literature search

Authors	Definition	Comments
<a href="#">AOTA (1995)</a> [OT206]  Macro definition	<p><i>'Occupations are the ordinary and familiar things that people do every day. This simple description reflects, but understates, the multidimensional and complex nature of daily occupation.'</i>p1015</p> <p><i>'occupations have performance, contextual, temporal, psychological social, symbolic, and spiritual dimensions. It is asserted that while all occupations constitute purposeful activity, not all purposeful activities can be described as occupations.'</i>p1016</p> <p><i>'most occupational pursuits seem to have both a general or cultural meaning attributed by participants and observers as well as a specific and personal meaning known only to the performer... Over time, the experiences embedded in daily occupations assume collective meaning and are interpreted as essential parts of a person's self-narrative or life story'</i>p1016-1017 [this is supportive of Pierce's separation of occupation and activity by 'performance' ie the general cultural meaning of for example the <b>activity</b> of 'getting dressed' is understood but it is only when a person performs it that the specific and personal meaning comes into play and the person has the <i>experience</i> of engaging in that <b>occupation</b>]</p>	<p>This is the position statement on occupation. It does state the macro-level definition, but recognises that this whilst all-encompassing does not explain the complexity of the concept.</p> <p>It comments on the nested nature of occupations - simple acts can be recognised as parts of more complex sets of acts, which again could be nested within larger sets of behaviours within a culture – they use the example of pursuing a career, but going to university to get a degree would be another. This is seen as related to a temporal dimension and the organisation of an occupation over time, with varying levels of complexity</p>
<a href="#">Bauerschmidt and Nelson (2011)</a> [OT104]  Literature review	<p><i>In the later stages of her career, Fidler (2000) considered the terms interchangeable. However, Pierce (2001) argued for a clear distinction between the two terms, with occupation conceptualized as a person's unique experience and with activity defined as a culturally shared idea about a type of doing. Taking a different tack, Polatajko, Davis, Hobson, et al. (2004) are among those who see a different distinction between activity and occupation, with an occupation being made up of a set of meaningful activities. Providing a third perspective, Nelson (1997) argued that the term activity lacks precision in that it often refers to nonhuman doing and simple motility, as in volcanic or atomic activity, whereas occupation always involves intentionality.'</i> p343</p>	<p>This literature review, looked at 9 decades of OT literature (3 yrs of each decade). Investigated the use of occupation, activity and related terms. Did a percentage stat of usage on the decades occupation was used prevalently in the 1920 and the 2000s – paradigm shift?</p>
<a href="#">Bendixen et al. (2006)</a> [OT91]	<p><i>'It is notable how the literature, when organised according to the WHO classification, provides words and definitions that form some kind of hierarchy of the concepts: occupations, activities and actions.'</i></p>	<p>Time geographic study of occupational therapy students in terms of</p>

Authors	Definition	Comments
Patchwork	<p><i>Here, an element from a higher level comprises elements from a lower level, such as when a number of actions make up an activity; and a number of activities make up an occupation</i>'p5</p> <p><i>'performed actions, activities and occupations might appear during seconds, minutes, days, weeks, months, years or a lifetime'</i>p6</p> <p>Following the research: <i>'The building blocks of occupations and occupational pattern are activities and actions. A human being performs occupations and activities differently: sometimes occupations and/or activities are interconnected, sometimes independent, sometimes both interconnected and independent, sometimes successively, and sometimes in a parallel progress. In addition, occupations and occupational patterns are related to occupational projects where an assembly of activities and occupations are interconnected by an overriding meaningful theme, a unifying motivation and goal, and given value by the individual and by the social context.'</i> P8</p>	<p>occupational patterns, using a diary method</p> <p>Suggesting that literature is agreeing to a hierarchy of the concepts occupations, activities and actions, with occupations at the top.</p> <p>The research findings seem to agree as says the building blocks of occupations are activities and actions. BUT also suggests that not all activities feed into occupations, they can exist separately and be happening in parallel of succession – can be harnessed jointly toward an 'occupational project' – something motivating and engaging and complex</p>
<a href="#">Boyt Schell</a> , Gillen and Scaffa (2014) p1237 Macro definition Typologies	<p><i>'The things that people do that occupy their time and attention; meaningful, purposeful activity; the personal activities that individuals choose or need to engage in and the ways in which each individual actually experiences them'</i></p>	<p>This definition includes the concepts of attending to what you are doing, that the doing needs to be meaningful and purposeful, and includes activities that a person chooses or needs to do – and it is about how the person actually experiences it –environment not inc., +very individually focussed</p>
<a href="#">Christiansen</a> , <a href="#">Baum and Bass-Haugen</a> (2005) Macro definition	<p><i>'Goal directed pursuits that typically extend over time, have meaning to the performance, and involve multiple tasks.'</i> p548</p>	<p>Goal directed – so purpose and also meaning is mentioned, also acknowledges that an occupation is made up of lots of small parts</p>

Authors	Definition	Comments
<a href="#">COT (2005)</a> Macro definition	<i>'An occupation is an activity or group of activities that engages a person in everyday life, has personal meaning and provides structure to time. Occupations are seen by the individual as a part of her/his identity and may be categorised as self-care, productivity and/or leisure.'</i> p2	Based on a research project – where they reviewed literature and did a Delphi study using a panel of experience occupational therapists
<a href="#">Creek and Hughes (2008)</a> [OT212] Literature review section	<i>'Within occupational therapy, there is confusion about the meaning of occupation and little agreement on how the concept should be defined (Whiteford et al., 2005; Creek, 1998). Some occupational therapists have claimed that the terms occupation and activity, or purposeful activity, represent the same concept (Molineux, 2004; Wilcock, 1993), whereas others have argued not only that they are different concepts but also that the word activity has a narrower meaning than occupation (Golledge, 1998; Ilott, 1995). In the last decade, there has been a drive to reclaim occupation as the domain of concern of the profession (Pierce 2001; Rebeiro 1998) and a concomitant suggestion that using the word activity to refer to what people do misrepresent and diminishes the profession. From the many texts promoting or debating the use of the word occupation, it is possible to identify some common features in occupational therapists' understanding of the concept. Occupation, for occupational therapists, means all the activities that people do in their daily lives that hold their attention, have meaning and purpose for them and are shaped by their environment and cultural context (ENOTHE 2008; Caulton and Dickson 2007; Iwama 2006; Wilcock 2006; Lavin 2005; Christiansen and Townsend 2004; American Occupational Therapy Association 2002).'</i> p457	This article describes the results of a literature review, in which selected literature was reviewed to see how the terms occupation and health are defined in occupational therapy literature, and to look at the evidence of a relationship between what people do and their health. The intention was also to identify factors that mediate the relationship between occupation and health. They summarise the definitions of several authors that I also include in this list – not sure if they have captured all the nuances within this summary – will see. Like the comments about confusion and little agreement. Some other authors suggest that the diversity in definition is not a problem and that each definition just needs to make sure that it is coherent and sound in its base, so that therapists can decide for themselves which suits their practice best – models of practice will tend to lean towards certain definitions



Authors	Definition	Comments
<p><a href="#">Creek (2003)</a> p32/33 [OT221]</p> <p>Literature review section</p> <p>Dimensions</p> <p>Typologies</p>	<p><i>'Occupation is a synthesis of doing, being and becoming that is central to the everyday life of every person and that provides longitudinal organisation of time and effort. Occupation is complex and multifaceted, incorporating physical, social, psychological, emotional and spiritual dimensions. It occurs in the interaction between persons and their environments so that the things that people do every day form the bridge between their inner and outer worlds and contribute to their sense of personal and social identity.</i></p> <p><i>Occupation is a basic need for people of all ages and is necessary for adaptation and survival. It has evolutionary, biological and social functions. Occupation serves to meet bodily, social and cultural needs, to give a sense of control, to build and maintain social networks, to validate social identity and to maintain emotional equilibrium. It influences childhood development, enables exploration and learning about the environment and about one's own and others' potential, and provides opportunities to test one's perceptions of the world. Occupations are adapted in response to, and in order to facilitate, periods of transition during people's lives.</i></p> <p><i>Occupations can be divided into three broad areas: self-maintenance, productivity and leisure...The occupations that people engage in have social, cultural, symbolic and spiritual significance for them. People adapt their occupations to reflect their values, commitments, meanings and social context. The initiation, expression and carrying out of occupation is, therefore, mostly unique to the individual'</i>p32/33</p>	<p>This was a literature review but in a different format, feeling more like research, as the aim is to produce a definition of occupational therapy which can be used in research, the literature review was followed by 'member checking' in that several occupational therapists were asked to review the definition, arrived at by engagement with the literature. As part of the</p> <p>5 dimensions of occupation – suggest it occurs during an interaction between the person and environment – almost as a bridge/conduit to allow their expression of self – personal and social identity. Also seems to be in the camp of it being an experience.</p> <p>Suggests the usual 3 broad areas of categorisation</p> <p>Interesting re the suggestion that they adapt occupations to reflect their values etc. – ties with what the diarists do e.g. the ethical shopping, supporting neighbourhoods, charity work, donations etc.</p>
<p>Crepeau, Cohn and Boyt Schell (2003)</p>	<p><i>'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' p1031</i></p>	<p>includes a typology – meeting human needs for self-care, enjoyment, and participation in society, but also suggests they need to be acceptable</p>

Authors	Definition	Comments
Macro definition		within the person's cultural context – first one to state that occupation gives structure to living
<a href="#">Desrosiers</a> (2005) [OT68] Literature review, but not occupation	<p><i>With the integration of participation into a universal conceptual framework [ICF], the word participation has entered the vocabulary of all health professionals. As occupational therapists, we have always considered the importance of promoting the accomplishment of significant occupations and have the advantage of being able to appropriate the concept easily. We must continue with our actions to promote engagement in valued activities and social roles from the clients' perspective, with respect to their needs and choices.</i>'p201-202 [definition of participation or occupation or activity – she talks about all three in this article and does not ever make clear what she sees is the difference between activity and participation, let alone activity – unless she feels that it really means participation in occupations – not quite the tack the Americans have taken] <i>'We should consider that psychological factors may be more highly associated with successful participation than optimal performance of the occupation itself. Finally, we have to keep in mind that an individual's satisfaction with participation may be more important than the level of participation itself and thus adapt our interventions in this regard'</i>p202 [Interesting points, she is echoing, or heralding, depending if she is saying it before or after – the authors suggesting that the occupation – so the engagement in it could be more important to people than whether it is done perfectly, and also the amount and even style/type of participation is not as important as the satisfaction they feel – ties with some of the work about older people who still engage in the things they enjoyed before but to a different, less active degree – or as in another article if not actively engaging in a sport, just being around it in some way – reading about it, helping out in the environment of the sport - so field/ground etc. can also be satisfying to a person and they can feel they are still involved/participating to the whole in someway.]</p> <p><i>'Indeed, participation, measured with the LIFE-H, was found to be related to subjective quality of life in older adults with disabilities, using Ferrans and Powers' (1985) Quality of Life Index (Levasseur, Desrosiers, &amp; Noreau, 2004). However, it has been found that satisfaction with participation is more positively related to quality of life than participation itself. So being satisfied with our engagement</i></p>	<p>This paper is based on the Muriel Driver Memorial Lecture (CAOT annual conference) The aim is to present and compare two models of disability and how they view participation, and then to review literature on the assessment of participation, its relationship with QoL and activities, best predictors, evolution over time (after rehab), and normal aging.</p> <p>Some interesting points about well-being on p199.</p> <p>Not sure can really include it in the definitions of occupation section as the author used participation/occupation/activity interchangeably so if she is not clear on the concept she is considering, can the definition she uses be clear? However she clearly makes the point, back up by literature that the experience of an occupation could be more important to QoL than a perfect outcome of that occupation, which could be useful in further discussions</p>

Authors	Definition	Comments
	<i>in our occupations is more related to subjective quality of life than the level of engagement itself. Therefore, this personal subjective judgement has to be considered as a determinant of quality of life which is inherent to long-term health (Noreau &amp; Fougereyrollas, 2000). In addition, the research demonstrates that satisfaction with social roles is more associated with quality of life than satisfaction with daily activities, confirming the importance of social roles in well-being.'</i> p199	
<a href="#">Eakman (2012)</a> [OT201] Patchwork	<p><i>'Diverse definitions of occupation...highlight the critical role of personal meaning in contextualizing and defining occupation. Conceptual models of therapeutic occupation also integrate the concept of activity meaning as being essential to the process and outcome of effective occupational therapy treatment (e.g., Townsend &amp; Polatjko, 2007). Therefore, valid indicators of subjective appraisals of meaning are critical to measure the full richness and depth of human engagement in occupation.'</i> p e20</p> <p><i>'a nearly singular focus on the purposive nature of occupation, such as goal-directed behaviors or tasks, may have inadvertently hindered theoretical development in this area. Hammell (2004) succinctly argued that occupational therapy will need to direct greater attention to affective and experiential qualities of occupation, such as basic human needs fulfilment through choice, control, and belonging.'</i> p e20</p> <p>Eakman proposes that EMAS has items which reflect what constitutes 'meaningful engagement' p e21, 'the EMAS brings together diverging perspectives on meaning and occupation' p e21. It is interesting as some of the categories in here do link to some of the theoretical elements that emerged from the data in my study. The abbreviated items shown in this article are:</p> <ol style="list-style-type: none"> <li>1 Help me take care of myself</li> <li>2 Reflect the kind of person I am</li> <li>3 Express my creativity</li> <li>4 Give me a sense of accomplishment</li> <li>5 Contribute to my feeling competent</li> <li>6 Are valued by other people</li> <li>7 Help other people</li> <li>8 Give me pleasure</li> <li>9 Give me a feeling of control</li> <li>10 Help me express my personal values</li> <li>11 Give me a sense of satisfaction</li> </ol>	<p>This article analysed secondary data samples of 154 older adults and 122 college students to evaluate a tool called the EMAS, developed by Goldberg, Brintnell and Goldberg (2002). Therefore, similarly to the article above, the definitions of occupational therapy sought out for the introductory sections were ones where the meaning element was present and/or emphasised, there is also a suggestion that focussing on other aspects, such as occupations being goal directed has meant that the full richness of human engagement in occupation has been obscured.</p>

Authors	Definition	Comments
	<i>12 Give me just the right amount of challenge</i>	
<a href="#">Hannam (1997)</a> [OT183] Research  Meaning in occupation	<p><i>Vygotsky highlighted the importance of the interaction between the individual and the objective world<sup>3</sup>. Activity and language play a dynamic role as mediators or tools in this process. Awareness that everything we do contains elements of our shared social reality is evident in the language we use. It is also a dynamic element in the how, where and when of all our occupations.</i></p> <p><i>‘There is much more to drinking tea than quenching thirst. This apparently simple routine occupation contains multiple meanings. Some are shared like the pleasure derived from using family heirlooms such as treasured china cups and saucers; the value of an early morning cup of tea in bed as a quiet, personal time and tea as an excuse for breaks, rest and change during the day. This shared culture provides the basic toolkit for behaviour. Individuals interpret this and use the tool in their personal configuration of meaning. Each participant highlighted particular themes which gave a personal shape to their cultural world.</i></p> <p><i>These meanings, formed within a specific culture, are the tools and signs which mediate human activity described by Vygotsky. The importance of context emphasises the experiential doing of an activity, integrating time, place, purpose and objects used. Vygotsky’s concept of meaningful activity is one in which activity moves us forward in history within a shared social experience.’p73</i></p> <p><i>‘Although mundane tea-making and drinking is rich in symbols and ritual. Many of the elements of meaning were shared but in a way which was unique to the individual.</i></p> <p><i>The importance of the meanings embedded within everyday occupations raises questions about those who do not have access to familiar routines, for example, elderly people in residential care, people with disabilities, and young people whose social reality has become chaotic and fragmented.’p73</i></p>	<p>This study was designed to elicit meanings of tea making for the five women who agreed to participate. Meaning was defined as everything communicated during an observation and semi-structured interview about tea making. Once these elements were identified, the second aim of the study was to discover whether the meanings were shared or unique to each person.</p> <p>‘Although this is a small-scale study using an unrepresentative sample and a single occupation, such limitations do not preclude the proposal that everyday occupation plays a dynamic part in holding the individual in a meaningful social world. While insights are restricted to this social groups the six meanings provide a starting point to explore the patterns of meaning amongst other people and activities’p73</p>
<a href="#">Hasselkus (2011)</a> [Book]  Theorist	<p><i>‘It is the experience—the dance—of the occupation that is important, not the occupation itself or the outcome... We can think of occupation as the vehicle by which we experience our worlds” (p. 185).</i></p>	<p>Whilst having purpose and meaning – perhaps in terms of an end product there is also the <b>experiential aspects of occupation</b>, which can be devalued in western society, Hasselkus (2011) suggests that the actual experience may be the most important part – for some</p>



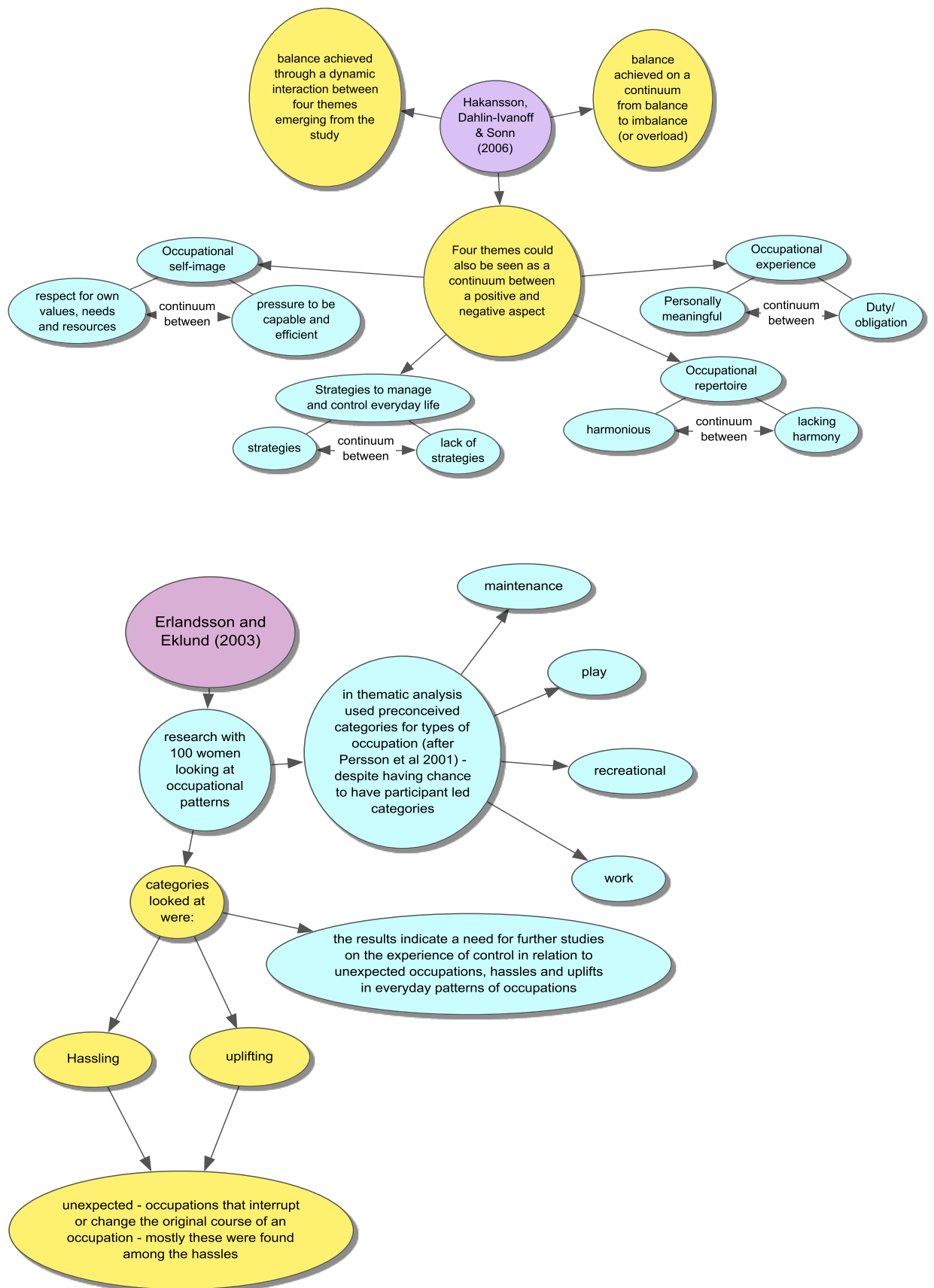
Authors	Definition	Comments
		people e.g. those with dementia or a person is dying this is what they can still do – have experiences and where occupational therapists working with those client groups focus their intervention.
<a href="#">Twinley (2013)</a> [OT180] Occupation and well-being	<i>It is possible to explore the dark side of a person's occupations and to gain an understanding of the underlying and associated values, interests, motivations, skills, abilities, capacities, roles, meanings and satisfactions attributed to this engagement. To illustrate, it is fitting to apply Wilcock's (2006) theory of occupation in an attempt to understand the perpetrator perspective of engaging in an antisocial occupation. We know that Wilcock described occupation as a synthesis of doing (all the things we do), being (how we feel about what we do), becoming and belonging. The balanced interaction of doing and being can enable becoming – that is the realisation of who we are as a result of the values, knowledge, skills, abilities and demands of people's occupations. A sense of belonging is seen as something we all strive for in what we do (Wilcock, 2006). And so it is suggested that each of these aspects of occupation contribute toward the formation of identity: individual, group, local, national, sociocultural. By applying this to a male perpetrator's account of engaging in violent football hooliganism (presented by Van De Mieroop), it seemed apparent that the occupation of hooliganism was what the man had been doing, being and becoming: "... the interviewee constructs a heroic identity that incorporates violence" (2009, p. 731). Moreover, Van De Mieroop confirms how the group membership gave the perpetrator a sense of belonging: "...he explicitly and consistently positions himself within the group of hooligans" (2009, p. 731).</i>	Not any new definition or concepts, but need to acknowledge this – especially when discussing the Lifestyle Balance theory – as this is where it disagrees with what people might really want to do that can give them a sense of well-being. I am not suggesting encouraging a group of pensioners to take up football hooliganism but if working client centred that there is something they want to do which you don't consider is health giving or health promoting – so what? If it gives them a sense of well-being and they want to do it that is their choice, but as a professional you could not aid illegal behaviour.
<a href="#">Yerxa (1994)</a> [OT232] Theoretical opinion piece	<i>'engagement in self-initiated, self-directed, adaptive, purposeful, culturally relevant, organized activity'</i> p587	This one is very individually focussed – , first one to say adaptive, talks about purposeful, cultural relevance, and that it is organised if it is an occupation
<a href="#">Yerxa (1998)</a> p366 [OT233]	<i>'Occupation may be organized into a view of the human as a multileveled, open system acting upon and responding to the environment over a developmental trajectory, from birth to death. At the cultural level occupation refers to the units of organized activity within the ongoing stream of human</i>	Broadened out from the 1994 Yerxa definition, suggests occupations need to be sanctioned by the culture/ be

Authors	Definition	Comments
<p><b>Theoretical</b> opinion piece</p>	<p><i>behavior that are named and classified by a society according to the purposes they serve; for example, "fishing" or "sewing" or, at a more abstract level, "playing" or "working." These everyday pursuits are self-initiated, goal-directed (purposeful), and socially recognized. Occupations, constituted of adaptive skills, are organized to achieve human intentions. Engagement in occupations may be personally satisfying and may serve an extrinsic purpose. Occupation enables people to contribute to society and thereby find a place in their culture'</i></p> <p><i>'occupation cannot be explained by reducing it to a level of understanding below that of the person, for example, to the level of organs such as muscle and joints. Persons, not synapses or muscles or cognitions, engage in occupation.'</i>(p367)</p>	<p>socially recognised. I suppose those on the edges of society form their own culture and then their occupations would be socially sanctioned by their culture.</p> <p>Like quote about not reducing to a level below the person – perhaps that also applies to a certain extent to the discussion about occupation – can't be explained by reducing it to a level of understanding below that of occupation. People engage in occupations because of the meaningfulness etc., it is necessary to understand the components that make up an occupation, in the same way it is necessary to understand the components that make up the person, but it is not necessary to dissect either to understand the interaction of the two in an experience – need to think a bit more about this. There is something about the PEO relationship needing more thought – I like Creek's bridge, and Pierce's individual occupational experience that can't be repeated in exactly the same way – which several authors seem to take on board as an idea – seems to tie with dynamic systems theory and soft assembly.</p>

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## Appendix 8: Occupational Balance Literary Analysis Examples



## Appendix 9: Small Sample of Initial Coding Schemes

### Comments about getting older

Name
Can't worry about the cost (£75) I have been to so many funerals this year that I thought I had better get on and fulfil some of my ambitions.
fear of getting older and what it might bring
I do grow less interested in my appearance - neat + tidy yes - more than that No! The invisibility of women my age is clear to me.
I DON'T MIND BEING GREY
NOT BAD FOR A LOT OF OLDIES.
OLD AGE ISN'T VERY APPEALING IS IT.
Reflected on my mum's death at the age of '63' -(my age)
she hasn't got much tolerance with the young
She is in her late 80's so time is precious

### Feeling lucky and appreciating circumstances

Name
At least it was quiet, our chief manageress away, tho' nice she is very exhausting
How fortunate I have so much energy to do so much in a day.
How lucky we are to have such good neighbours
How lucky we are to live next to Sports field
I'm very pleased that our relationship has improved
Reflecting on the day + my sheer good fortune really.
TODAY HAS BEEN PLEASANT, IN FACT THE WHOLE WEEK HAS BEEN ENJOYABLE.
TODAY HAS BEEN VERY PLEASANT, LIKE MOST OF OUR DAYS ARE REALLY
WE'RE LUCKY TO LIVE SO NEAR TO SOME REALLY NICE COUNTRY SIDE
you have the feeling it's great to be alive

### Me time

Name
"recovery" for me
Alone at last
DECIDE TO BE KIND TO MY FACE
engaging in hobby (active)
just wanted time to myself
luxuriate in hot tub, then steam room,
My time to switch off & not think.

## Morning

	Name
<input checked="" type="radio"/>	Arise!
<input checked="" type="radio"/>	breakfast
<input checked="" type="radio"/>	Coffee and cereals on Sunday
<input checked="" type="radio"/>	COULD HAVE DONE WITH A LIE-IN TODAY
<input checked="" type="radio"/>	Didn't want to lie in bed as it is such a lovely day - warmest of the year so far.
<input checked="" type="radio"/>	going to bed in day
<input checked="" type="radio"/>	I am not a morning person by nature.
<input checked="" type="radio"/>	I feel vaguely cheated by non-leisurely starts
<input checked="" type="radio"/>	morning routines and rituals
<input checked="" type="radio"/>	Stayed in bed
<input checked="" type="radio"/>	went back to bed
<input checked="" type="radio"/>	went back to sleep
<input checked="" type="radio"/>	Woke up

## time

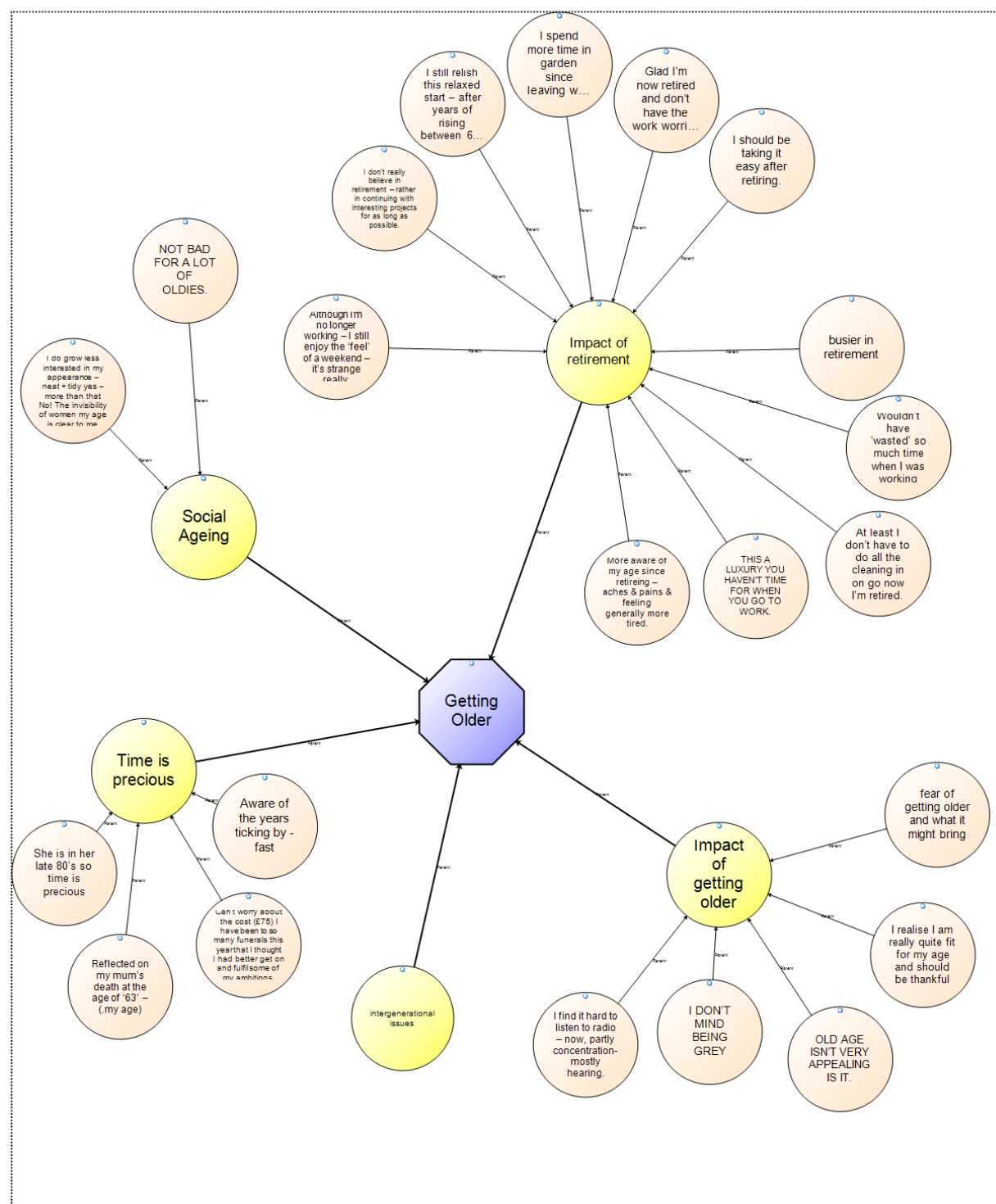
	Name
<input checked="" type="radio"/>	Aware of the years ticking by - fast
<input checked="" type="radio"/>	aware of time
<input checked="" type="radio"/>	Before I could look round it was 12.30
<input checked="" type="radio"/>	It seems we were no sooner there than we were on the way home.
<input checked="" type="radio"/>	killing time
<input checked="" type="radio"/>	Quite a lot of time seems to vanish this way....
<input checked="" type="radio"/>	The time always disappears - the ease of contact, offset by an idea of "time wasted"
<input checked="" type="radio"/>	time passing, plans changing

## People

	Name
<input type="radio"/>	appreciation of support from others
<input type="radio"/>	asking someone for help
<input type="radio"/>	chat
<input type="radio"/>	comment on other people
<input type="radio"/>	comparison of personal situation with others
<input type="radio"/>	comparison with someone in worse situation
<input type="radio"/>	consulting partner
<input type="radio"/>	Contacted trainer for supervision
<input type="radio"/>	deferring decision until can consult partner
<input type="radio"/>	doing things for other people
<input type="radio"/>	doing things to humour other people
<input type="radio"/>	Doing things whilst partner out the way
<input type="radio"/>	doing things with other people
<input type="radio"/>	Doing things with partner
<input type="radio"/>	going to something new with another person.
<input type="radio"/>	grandchildren
<input type="radio"/>	Hate being a carer & that awful feeling of being trapped.
<input type="radio"/>	He is ready for collection!
<input type="radio"/>	Husband wanting to talk, but haven't got the time to listen
<input type="radio"/>	I do not like being critical.
<input type="radio"/>	impact of other people on enjoyment of activity
<input type="radio"/>	intimacy and sex
<input type="radio"/>	Irritated by drivers going slow, wanted to overtake but unable due to safety issues
<input type="radio"/>	keeping in contact with people far away
<input type="radio"/>	listen to people
<input type="radio"/>	looking for someone
<input type="radio"/>	Mothers never stop worrying about their children
<input type="radio"/>	my role is to support her
<input type="radio"/>	nice to see familiar faces.
<input type="radio"/>	no time for cuddles, J has dental appointment. Swizz.
<input type="radio"/>	Panic over call from J's step-daughter
<input type="radio"/>	partner gone out - place and time to self
<input type="radio"/>	people confiding in diarist
<input type="radio"/>	people doing things for them
<input type="radio"/>	people not listening
<input type="radio"/>	playing with and amusing children
<input type="radio"/>	pop around to friend's for chat
<input type="radio"/>	reciprocation
<input type="radio"/>	request from family member
<input type="radio"/>	request from friend
<input type="radio"/>	sharing knowledge with younger people
<input type="radio"/>	she likes to keep tabs on me
<input type="radio"/>	surrogate for parent
<input type="radio"/>	taking an interest in partner's solo activities
<input type="radio"/>	the share group being our common bond

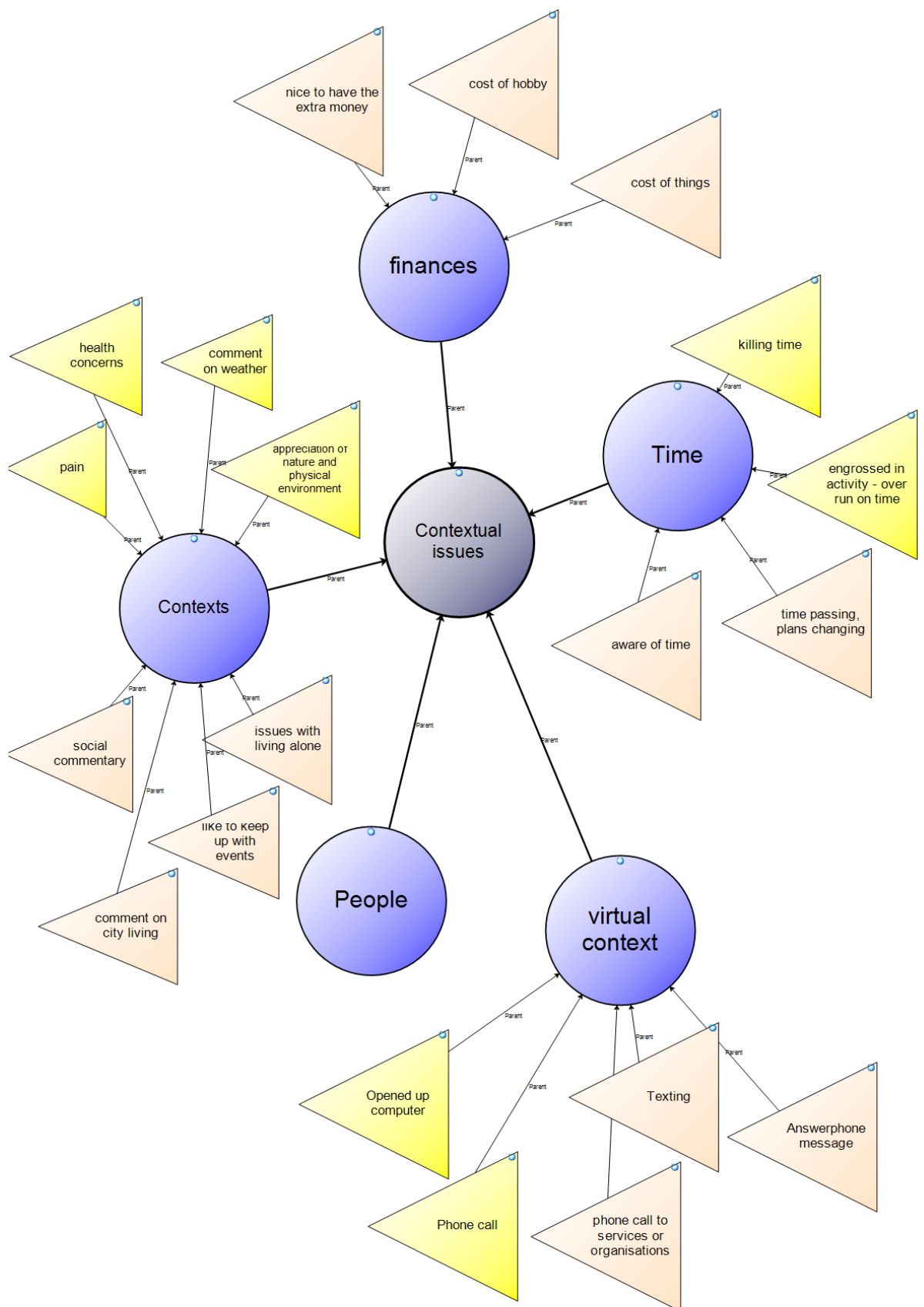
## Appendix 10: Focussed Coding Diagrams for codes related to getting older and to contextual issues:

### Getting Older





## Contextual issues



## Appendix 11: Full Analysis of Types of Doing Sub-Subtheme

I have avoided, as much as possible, the use of the standard typology used within the field, for reasons previously explained. Having said that, the first two sub-subthemes within types of doing bear a clear resemblance to some of the typologies used within the field, and will be discussed together:

### *Doing for self-care and Caring for home and domestic circumstances*

These activities seem to provide some of the basic structure to the diarists' occupational patterns. Whilst it may appear that the time for these was anchored in place and the rest of their time could then be used for more self-actualising activities if desired, diarists did not describe these activities in that way. Other categories of occupation were much more likely to be described as the lynch-pin for their day or week, or what centred their week. Looking after the physical self was important and engaged in with regularity, but was not viewed as particularly challenging or fulfilling.

The types of activities within *doing for self-care* are also termed as activities of self-care in occupational therapy and occupational science (AOTA, 2014). These were a distinct type of activity recognisable in the data undertaken by all diarists, and it was faithful to the data to call them self-care. These are mainly solitary activities, regardless of living situation. The purpose was tending to cleanliness and 'personal' activities such as showering, teeth cleaning, grooming, dressing and going to the toilet. Within the literature, eating is also included within self-care but the data in this research showed that eating and drinking served more functions than just the maintenance of the physical self and so are considered as a separate type of doing. Some examples of doing for self-care are shown below:

- 11.30 break for shower and sandwich lunch. Spend time flossing and brushing teeth. d1w1s2
- 9.00 Getting started for the day. Showered, dressed and then did yesterday's washing up at the same time as today's. I was too tired to bother with it last night! d2w2s4
- 7.15 Tea, Breakfast & toilet, Glad that I am regular almost every morning d5w1s7
- 2015hrs Time for bath/soak and ready for bed d7w1s7

The *caring for home and domestic circumstances* typology is congruent with the types of activities called Instrumental Activities of Daily Living (IADLs) (AOTA 2014). The category includes the cleaning and laundry, shopping, food gathering, preparation and cooking activities that the diarists engaged in regularly across the week – some daily, some less frequently. Some examples below:

- 2.45 Dish washing, Must clear muddles in kitchen d2w1s1
- 12.00 Prepared lunch and sorted out letters etc. d8w1s4
- 0645 cheque written out for Coal delivery – across to paper Shop & Collect two daily Papers d7w2s2

- 8.00 – 9.00 Breakfast. Tidied up, looked at magazines, daydreamed. Quite a lot of time seems to vanish this way.... d17w1s4

Also, activities like home maintenance, tidying the garden, putting the bins out. All the diarists engaged in these and recognised their necessity, the term 'must' was often used in relation to these activities as will be discussed in the section on 'Must do' activities.

- 9.15 Put out refuse bins for collection tomorrow d5w2s3
- Swept the Patio – The Magnolia is lovely d15w1s4
- 8.45 Breakfast. Chores – hovering, washing, hair, mending etc., Not exciting but necessary! d3w1s4

Some of these caring for the home and domestic circumstances activities were carried out using a computer as might be expected, as computers are becoming increasingly used for shopping, communication and paying for services in the UK, some examples:

- 10.35 Opened up computer. Wrote letter to tax office also parking fine office. d2w1s1
- 19.00 web surfing e.g., ordering wine on line; we drink a bottle or so a day and it's heavy to carry back. d1w1s2

The next two types of doing will also be discussed together and are doing for and doing with other people.

#### *Doing for other people and Doing with other people*

These types of doing, evident in the diarists' entries, were not related directly to any of the usual typologies. They can be considered as tangible demonstrations of social participation in action, when considered as a category of occupation (AOTA, 2014), rather than as the broader concept suggested by this project.

In relation to *doing for other people*, those they were 'doing for' were often family and friends, and sometimes members of their community. This type of doing appeared often in the diaries as an activity which was integral to their daily pattern, for example Diarist 5 shopped for his mother once a week, and took her a fish and chip dinner at the same time. Along with the previous two types of doing, some of these activities formed the basic structure of their occupational pattern, around which other activities fitted, but again were not necessarily described as the lynch-pin to their pattern. Overall these types of doing seemed to be about a straight forward need to do for others and build up relationships, with no expectation of reciprocity. Some examples:

- 6pm Picked my close friend up and went to the [shopping centre] – her son came along. We did a bit of shopping and had a coffee in M & S. She told me about the family problems she has been having. Good to see [friend] before she goes on holiday at the end of the week. Glad she feels able to confide in me about her family problems. d6w2s3
- 10.30pm [son] rang to ask if I could look after [granddaughter] tomorrow morning – plumbing emergency. Said I would look after her until 10.30am but I have an appointment at 10.45a.m. [Husband] said he would come home from work. d6w2s3

- 3.30 Went to help neighbours carry large tree into their garden. Tree – Very, very impressed with neighbour's garden but the Monkey Puzzle tree was difficult to handle!  
d8w1s3

In relation to *doing with other people*, this is also manifestation of social participation as defined as an occupational category (AOTA, 2014). In descriptive terms, the activities entailed interaction with other people within their social environment, so had a strong sociability element to them. In fact, these activities, in many instances, were only possible when including the people with whom they engaged in them, i.e. having granddaughter to stay, phone calls with friends, having a mixed afternoon of leisure and errands, in town, with partner etc. Some examples are shown below; these types of activities were evident across all the diaries, emphasising the importance of social doing for these older adults, and the enjoyment associated with this type of engagement.

- 21.00 jump in car, go down town to [City] pub sit and chat, listen to the music, greet other musos, play a set (only 2 songs tonight) with [friend] and a guy I don't know on mouth harp; sit outside and smoke, decide we'll go on home and catch the end of Question Time;  
d1w1s4
- 12.00 Out to lunch to celebrate my neighbours 94th birthday. Went to hotel in [Town]. Although not terribly busy, the atmosphere was pleasant, food and service good  
d2w2s1
- 10.00 Arrived at [Tourist Attraction] and had brilliant morning. This was our second visit with granddaughter & this time saw the other half of the estate. Brilliant to see how interested granddaughter was in all the history  
d8w1s5

The following type of doing, again does not gel with categories in the literature, but was evident within the all the diaries, to varying extents. It is called 'must do' activities.

### *'Must do' activities*

The emphasis here is the wording used by the diarists in describing the particular activity. There was a self-imposed decree that these were 'must do' activities. The diarists identified they *needed to* or *must* be done, some expressed satisfaction when they were completed but did not particularly enjoy engaging in doing them.

### *Domestic Chores and Household Maintenance*

A lot of activities that fell within the 'Must Do' sub-subtheme were domestic chores and household maintenance and so overlapped with the previous category *caring for home and domestic activities*.

- Don't particularly enjoy food shopping – it's a chore. My thoughts if have to do a chore just get on & do it  
d14w1r7
- Domestic chores (have to be done)  
d17w1r2
- 9.00 Watering. Must water garden – some of my delphiniums are crying out for rain.  
d2w1s4
- 2.00 Went outside to weed between block paving. Hate this job but it must be done regularly to keep the weeds down  
d8w2s1

### Social 'Must dos'

Following on from domestic chores, another area of must do activities are where a sense of duty and loyalty to those in a social network meant that the diarists engaged in 'must do' visits or phone calls, even when they did not enjoy them. These 'must dos' tie closely with the sense of social obligation engendered by social participation; wanting to maintain friendship ties; and possibly also their identity as a person who follows social mores about such activities. Two examples illustrate these below.

- *5.00. I decided I must pay a visit next door as I didn't spend any time with [neighbour]. She is feeling depressed as she has not seen anyone today...An hour & a quarter I return home to get some tea, - at least [neighbour] is more cheerful again.* d2w2s5
- *4.55 Friend came to call – sat & listened to long diatribe about what she did yesterday. Have known her since 1983 – single lady a bit older than me. Seems to have increased her self-promotion as she's got older – never asks about anything I've done with my day/week. Still I've learned to cope with this over the years since my life has a wide variety of facets & people in it.* d11w1s1

### Health 'Must dos'

The third type of 'must do' activity noticeable in the diaries was health related 'must do' activities, which were activities that the diarists engaged in because they felt these would keep them fit and able to continue with their busy lives and current patterns of doing. Health must dos are an interesting area to consider, all the diarists engaged in these in some form or another. They seemed to be linked closely to their feelings about ageing; acknowledgements of possible morbidities waiting around the corner for them; and a sense of holding the key to their continued engagement in activities they enjoy in their own hands. If they were not fit enough, they would need to modify the activities they engaged in or cease them altogether. See also the sub-theme *Influences on Engagement* for further discussion. The excerpt below from Diarist 14 sums up the attitude of diarists towards these types of activities:

- *Treat gym as an activity like brushing your teeth. I don't particularly enjoy it, would prefer doing something else e.g. gardening. BUT at my age I know I've got to keep fit* d14w1r3

These were exclusively physical activities and there was a sense of continuity, as frequently they had engaged in these activities pre-retirement. There was undeniably a social element, as well as the health maintenance element to the continued engagement in a lot of the activities, as demonstrated in Diarist 6's excerpt:

- *I went to an over 50's badminton session at local sports centre...I have been going to a weekly session for the past 11+ years...I feel I am making an effort to maintain good fitness by exercising regularly and really enjoy the company of the others in the group* d6w2r3

Some of the diarists also seemed to demonstrate a sense of pride in their continued engagement, see Diarist 2's comments below, who felt that the class she attended was instrumental in her continued ability to engage in her busy daily life, despite health conditions. She alludes to others of her age who had not been active, and who were paying the consequences of this.

- Keep fit Class...in local hall...I was the oldest. Class takes place once a week. This has kept me agile over the years. My hip operations have now restricted some of my bending (not hips but from my waist). How great to do movements as a class. Everyone has attended for years so there is a friendly atmosphere...I appreciate the fact that I am healthy enough to do most things, if only some of my friends had kept exercising*

d2w1r3

It is noticeable that the diarists all engaged in crosswords, puzzles, etc. to keep their minds active, but did not use language such as 'must do' or 'a chore' about those sorts of cognitive health enhancing activities. These physical activities also make an appearance in other areas of the thematic analysis as diarists also enjoyed physical activity, but there was certainly an element of 'must do' about the regularity and the intensity. Moving on then, to analyse activities considered more a matter of free will, I will consider leisure or 'own time' doing.

#### *Leisure or 'own time' doing*

There are many and varied types of leisure activities that the diarists engaged in, ranging from less energetic, more sedentary pursuits such as reading, doing puzzles (almost all diarists engaged in these), relaxing (often in the garden), through to more active pursuits such as bowls, darts, walking, cycling, keep fit and so on. What they had in common was that the diarists *chose* to do them. They may or may not involve a challenge, but they were pastimes in the true sense, and were engaged in with a sense of enjoyment. Enjoyment was a crucial factor which influenced motivation to engage in a range of activities, especially in leisure pursuits and linked to subjective well-being. I will discuss this in more detail when considering the theme *Influences on Engagement in Doing* in the next chapter.

The diarists engaged in both social leisure activity and solo 'own time' pursuits. It seems that whilst social participation was a strong motivator, as a function of the need to 'belong' to a family, group(s) or community, the diarists also appreciated alone time. The need for alone time is also captured in the theme around planning, pausing and pacing as it was crucial for them to recharge not only their physical energy but also, it appears, their 'social energy'.

Within the sub-subtheme *Leisure or own time doing*, there were three further demarcations, relaxing and/or sedentary; active (social or solo); and hobbies. Below are some examples delineated into these three areas. Some of the pastimes mentioned have more than one element to them and so could come under more than one of the sub-classifications, I have included them under the 'best fit'.

### Relaxing and/or Sedentary:

Including activities such as reading, relaxing in the sun, doing crosswords, some watching of TV. Some of the actual 'doing' was done in a companionable way i.e. sat with partner, or else completely alone, depending on the diarists' home situation and choice at the time. Whilst most of these activities seemed to take place in and around the home, this was not the case for all relaxing activities, for example, see the excerpt below from Diarist 9, a description of going to the cinema with a friend as a relaxing and calming experience for her.

- *2.45 Met [Friend] at Little Cinema to see 'Le Quattro Volte' This was a lovely peaceful little film – where little happened – but beautifully observed + paced + made me slow my thoughts...* d9w1s1

Almost all the diarists mentioned doing puzzles, Sudoku and crosswords, reading the paper and listening to the radio, quite freely as means of relaxation

- *Relaxed in the garden for most of the afternoon, reading papers and doing puzzles* d6w1s3
- *7.00 Read Telegraph & did Sudoku etc. Watched film 'Mama Mia' on TV* d8w1s6

Most mentioned watching the TV, but to varying degrees and the way they described it differed significantly. Some were almost apologetic about spending time doing it, or proud of the fact they did not do much of it. Possibly this is about the stereotyping of elderly people as sat immobile with blankets on their knees watching TV in a nursing home, or perhaps it is the prevailing idea that people watching TV for leisure is just laziness when they could be doing something active. Whatever the reason, the diarists used terms suggestive of a reluctance to be seen as a frequent user.

- *7 pm...Felt lazy & gave myself permission to be 'brain dead' – bliss, not having to think just stare at the TV* d14w2s2
- *8.00 Country file I watch very little television as you are no doubt aware from my week's diary, but I do try to look at this.* d2w1s6

Also, another trend noted in the diaries in relation to TV use, was the tendency to watch TV and do other things at the same time, for example ironing, puzzles, knitting, reading, cooking, see examples below. When the other activity was something needing fuller cognitive attention, such as reading, sudoku or puzzles it was probably used as background noise, as per Diarist 14's suggestion below. In the case of other activities, such as ironing, knitting and some types of cooking it would have been more of an interesting focus whilst carrying out a more 'auto-pilot' type of task.

- *7.00 Sat down as usual to read paper properly do Sudoku & crossword, whilst watching TV.* d8w1s2
- *7.15 Everything cleared away and now I'm going to sit down. Watched some television, did some diary, some knitting and reading.* d13w2s1



- 7.30 Sat down with a hot drink & commence reading, TV on used as background noise  
d14w2s1
- 6:00 Ironing in front of T.V. news  
d9w2s1

The other main activity used for relaxation by the diarists was reading, whether newspapers, factual books or novels. Sometimes in the day but often as part of their sleep preparation routines – two typical examples are shown below. Mostly these were still physical books, although some of the diarists owned kindles. A few of the diarists mentioned using the computer for surfing and for games, as well as more formal work functions, see Diarist 17's comment below about internet use.

- 20.00 dinner, followed by cigar, stretch out with a book.  
d1w1s2
- 10.40 Bed read a book 'Wild Swans' for 20mins  
d14w1s1
- 7-10.20 Researching topics of interest on internet. Am I internet addicted? The thing has so many uses!  
d17w1s1

### Active Leisure

Activities in this sub-subtheme were either social or solitary leisure experiences. Active leisure pursuits tended to have more of a social aspect to them in the diaries, with the main exception being gardening.

#### Social Active Leisure:

Active social leisure included trips out to places of interest (see example from Diarist 12), or going on planned walks (see example from Diarist 9), although as discussed, this included exercise classes or going to the gym for some diarists, as these were chosen pastimes which were often enjoyed. An example of playing computer games together from Diarist 5 is also included in this section, as people are mentally active when engaging in these. With 3D interactive games these could also be physically active, although the diarists did not describe engaging in these.

- 11.00 Decide to have a trip out to [Historic Town]. [Partner] made sandwiches for lunch. I packed up portable gas stove and cups, milk for tea making and set off. There is a photographic museum at the [Tourist Attraction] which I always find interesting as well as the [famous writer] exhibition so today should be good  
d12w1s6
- 10.30 Drove to [Park] to join Walking Group. Lovely sun, but chilly wind – nice to see familiar faces.  
d9w2s1
- 9.00 Games on computer. Something we can do together  
d5w1s1

#### Solo Active Leisure:

As mentioned above, gardening was often carried out as a solo pursuit, either in their garden, or on an allotment. This could be seen as a hobby in the truest sense of the word, but also needs to be done to ensure a well-maintained house and grounds. The fact that a garden was on display within their neighbourhood could be a motivation to keep it in good order. Certainly, the diarists mention varying levels of satisfaction with how well they managed to maintain their gardens, and considered it an area that they would spend money on to improve. Diarist 8 was proud of how



the lawn looked when cut, and Diarist 9 chose a property to move into where she did not need to expend too much effort to keep the garden in good order. A decision taken due to her back condition.

- 3.05 Went back outside to continue cutting back lawn, cut edges and sweep up. I find cutting the lawn quite therapeutic and it looks so lovely after it is done. d8w2s4
- 2.00 Bit of "gardening". I am enjoying my new courtyard garden – + tinkering with pots offers enjoyment without too much labour + back pain. d9w1s2

## Hobbies

Hobbies could be active or sedentary, often solitary. This final type of leisure, noted within some of the diaries, was more clearly demarcated than the others, it is where the diarists engaged in creative craft or hobby type activities which required skill, concentration and interest. These types of activities often took place alone, but occasionally in groups of others engaging in the same activity. The two examples below, baking and card making are both done either alone or with others. Diarist 8 did baking with her grandchildren as well as alone. Diarist 2 did card making alone and in a community group. It may be more important to Diarist 2 that she went into the community to engage in this hobby, as well as doing it on her own, as she lives alone, and her family do not live near-by. The difference between this and active or relaxing leisure, although it can share properties with both, is the creativity, skill and concentration involved in this sort of activity. Hobbyists are loyal to the types of activities in which they engage and expend energy and finance to continue to engage. As with social participation type activities there tend to be a range of activities which support the continued engagement in that hobby, such as attending workshops, visiting exhibitions, buying special equipment. This falls into an area Stebbins (2000; 2001) would class as serious leisure<sup>7</sup>. For example, apart from Diarist 8 and 2, Diarist 7 also had 'old motorbike' maintenance.

- 10.35 Rushed to finish baking before friend arrived, scones turned out well and they must have been nice because my friend had 3. d8w2s1
- Making cards: I find it a relaxing hobby at home, although I must say at the class we still attend there is a fair amount of chatter, but we do pick up some new ideas and it's a chance to exchange bits & pieces. We meet once a month for an hour. About half a dozen of us go on a regular basis. I make birthday and special occasion cards and it is a means of keeping in touch with my grandchildren. d2w1r8

Some diarists kept a continuity in relation to their leisure pursuits from before retirement and after, suggesting that these were valued occupations and helped to preserve their occupational

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<sup>7</sup> Stebbins (2000) defines serious leisure as the 'systematic pursuit of an amateur, hobbyist or volunteer activity' (p. 4) which generates its own special orientation and requires substantial engagement and interest to acquire the special skills and knowledge to participate to a satisfactory level. He suggests that the participants engage in a 'career' in the leisure pursuit due to the special orientation, or 'spirit of serious leisure' (p.4).

identity beyond a transitional time in their life, i.e. retirement. Diarist 11's hobby is a clear example of this, and it was clear to see that the strong sense of meaning, along with the challenge involved, led to a high level of motivation for her to continue to engage.

- 9 On computer did more to "[Road Name] in the 40's". Am writing history of my road in the 40's for the children, so awash with nostalgic thoughts! d11w1s3
- 12.30-4 Snack, then off to [town] to take pictures to add to local history research, thoroughly enjoy roaming round church – will arrange pics on PC later d11w1d7

There is some overlap between classifications for activities discussed so far. A pursuit considered to be leisure and enjoyable by one diarist, was a 'must do' activity for another. For example, some exercise activities certainly demonstrate this ambivalence about where they 'belong' – even within the same diarist's writing. The diarist would acknowledge that whilst they got enjoyment from the activity they felt that they *must* do it, to maintain their abilities. Diarists were very mindful that if they were not physically and mentally fit enough, they would not be able to engage in meaningful occupations, and some felt they were lucky to still be able to do so. It seemed that they considered engaging in an active leisure allowed them to continue to engage in other activities which were important to them. This is an example of why the categorising of occupation is difficult to achieve. Every occupation can be a different category of occupation to different people, or to the same person at different times in their lives.

Moving on from looking at *Leisure or 'own-time' doing*, the sub-subtheme of *work and community involvement* will be discussed

### *Work and community involvement*

Some of the work and community involvement activities of the diarists have been discussed previously, under *community level social participation*. Community involvement here means productive activities that the diarists engaged in. This community involvement could be partly filling the 'activity void' left by retirement from work, alongside providing an outward expression of their occupational identity. Retirement is a transitional point in people's life narratives. The loss of their work role as an outward validation of their identity could drive the need to consider other activities to fulfil that role and shape, as well as demonstrate, who they are now becoming.

Within the Practice Framework (AOTA, 2014) the category of occupation 'Work' includes voluntary work as it acknowledges that it fulfils many of the same criteria as paid employment in relation to challenge and interest. Some occupational therapy theorists use the term productivity instead of work as a more inclusive term (Townsend *et al.*, 1997), meaning occupations which make a social or economic contribution to their family, peer group or community; or provide economic support for the person. The diarists who do not engage in paid

employment, either engage in voluntary work, or are providing services to their families in terms of childcare and other assistance to help them whilst they are working. This demonstrates the range of different ways older people maintain productivity in their lives as retirees. Below are some examples of the diarists' productivity activities within these areas

### Paid Work

None of the diarists worked full time since retiring, although Diarist 14 worked several days a week. Some of the diarists worked in areas which were similar to their pre-retirement roles, such as Diarist 14 and 17. Others were in service industry type roles, not like their pre-retirement work, such as Diarist 9. She worked as a Tour Guide at a local attraction, she had been doing this for several years, but her main pre-retirement occupation was as a Teacher at a Primary School. Diarist 13 worked as a company representative for a door to door make-up firm, as a side-line pre-retirement, this continued into retirement as the main form of productivity. Several of the diarists worked from home for some or all their working time, for example Diarist 17, who is a writer/researcher. The diaries demonstrated varied patterns of paid work and the reduced role which work takes in most of the diarist's lives, except for Diarist 14 for who it appears to still hold a very central role. Below are excerpts for Diarist 9, 13 and 17 which show the fairly relaxed format and timing to their work role.

- 12.45-4.00 Checked in for work + changed into costume. Talks, till work + shop. d9w2s3
- 7.45I've been a [company] representative for many years and my order comes today. I've met some really nice people being a [company] rep and have got to know their children and grandchildren, I quite enjoy doing it but don't like the company. d13w1s7
- 3.15-4.15 Made tea, settled down with computer & did some writing. 4.45 Resumed writing. Work went better after this break. d17w1s2

The four excerpts below are from the first four days of Diarist 14's first week of diary entries. On day 1, 3 and 4 she was involved in quite intense work activities, both in the office and at home in the delivery or preparation of work. There did not seem to be any time of the day or night which was 'off limits' in terms of when she would engage in work activities. In several other parts of her diary, she acknowledged that her husband thought she did too much. She also asked herself why she did as much sometimes. Her answer was that she liked her mind to be active.

- 2pm Saw client for 50 mins. 3pm 4th Client for 50 mins. 4pm Training Meeting. Discussing progress of Students with external examiner. d14w1s1
- 10pm Listened to the news on TV while sorting out paperwork from today's meeting & seeing clients Mind active. Thought about seminars/supervision for Sept 11. d14w1s1
- 6.30pm...Did further reading. Beginning to feel anxious as feel I haven't done enough reading. I know I always do more preparation than is needed for the seminars. Our last day together as a group, wanting to give the group a satisfactory ending d14w1s3
- 06.55 Up. Made a hot drink – sat & read clinical paper & made notes for today's seminar. Feel content about what I will be presenting d14w1s4

## Voluntary Work

Diarists engaged in various voluntary work, as discussed in the section on *Social Participation at Community Level*, some regular and some more ad-hoc. Similarly, to the spread for paid work engaged in after retirement, some voluntary work demonstrated continuity with pre-retirement work. For example, Diarist 3, who formerly was a librarian, classified books for the church, and her other charity work was taking library books out to older people in the community, both demonstrating continuity with her pre-retirement role.

- 10.12 Classify Books for the church. Brings back memories d3w2s7

This was also the case for Diarist 8, formerly a primary school teacher, who took School Assemblies and taught Sunday School among her voluntary work.

Diarists 5 and 7 took on voluntary roles which did not offer continuity with pre-retirement work; were engaged in to support their political beliefs; and/or to provide a service to the community, whilst also offering the opportunity for social participation.

- 9.30 Deliver some Lib Dems leaflets (Focus) most delivered yesterday. d5w2s1
- 1330hrs Time for over 50s club meeting at Church Hall...I act as doorman so who to let into club, chair set, sometimes tea boy – other duties if problems d7w1s5

Diarists 2 and 11 were engaged in more formal voluntary work, on committees and steering groups, where their administrative backgrounds enabled them to engage to a highly competent level, affording them satisfaction. In all cases these activities continued to support the diarists' occupational history through into their current life narrative, and demonstrated who they were post-retirement, through the activities in which they engaged.

- 10.30 WI Programme I tidied up the WI file on next year's speakers. Other committee members have promised to get three speakers. Most of the speakers I contacted have confirmed their visit. d2w2s6
- 16.35 With Test cricket as background spent a couple hours writing out the Terms of reference for PPG group d11w1s2

## Family Support

Diarists with children in the local area seemed to offer regular support with childcare for their grandchildren. Those with families further away had grandchildren to stay as often as possible, and kept regular contact in between. Diarist 6 was very active in terms of providing childcare on at least a weekly basis, as was Diarist 11. They were both very proud of this involvement. Diarist 6 kept a difficult relationship with her daughter-in-law as friendly as possible so that she could continue to do this. The diarists valued the contact with their grandchildren so very highly that

they would not ‘rock any boats’ if it might mean losing this, perhaps not fully grasping the very real social and financial benefits of this childcare to their children.

- 7.30am Got up & had a cup of tea. [husband] is home from work as we have [granddaughter] each Tuesday. 8.45am [husband] picked [granddaughter] up from home and we had a bit of breakfast then a bit of play d6w2s1
- 7 up early – have gr.dau. today. 8 breakfast, drive to [Town] pick up [granddaughter] – shop at Waitrose. 11-1 make sandcastles, play boules, in other words be a granny to a very active gr.dau. 2-5 off down the park to play on the swings, walk into town. 6 return [granddaughter] to [Town]. 7-9 “recovery” for me – eat meal read the Guardian, watch TV! d11w1s6

Having discussed *work and community involvement*, the analysis will now move on to look at the category of *getting about* which is a form of doing, in its own right.

### *Getting about*

Frequently in their accounts of their activities, the diarists did not mention the mode of transport used to get to a certain event or activity, although it is easy to surmise that often they got there by car. It was perhaps used so often they did not think about it enough to always capture that mode of transport specifically. Where they were walking, catching a bus or train or cycling they always seemed to specify these modes of transport, suggestive that the integral part the car played in their daily lives was often taken for granted. Some of the diarists did acknowledge how difficult independence would be without their car, but this was not focussed on to any great degree, especially where people were comfortable with other modes of transport and other ways of getting goods e.g. by shopping on the internet. This could also be due to living in and around a city – where public transport was easier to come by, so thoughts of life without a car did not appear as grim.

### *Mode of transport not specified (but likely to be car)*

- 09.45 going to Tesco to do weekend shopping but have some [Company] orders and books to deliver on the way round. d12w1s3
- 10.00 Picked up granddaughter and two of her friends to take them into town. Makes you realise how much more advanced girls are these days, they are so confident about going shopping on their own in town - so grown up d8w2s3

### *Specified mode of getting around*

- 13.00 catch bus to town. hooray for bus pass d1w1s2
- 11.00 Went to collect newspaper & bank, 40-minute walk made me feel better d2w1s1
- 2.45 We cycled to [town] to collect [husband]’s gold chain from the jewellers. d12w1s5
- Got car & went to hairdresser. [She] had time to give me a haircut. I am so thankful that I can still drive – and enjoy it. d15w1s7
- 1.40-2.40 Train to [city]. Journey back was a bit boring- (a) because train stops a lot; (b) because I’ve done the journey so often. d17w1s6

## Meals and drinks

There were many mentions of meals and drinks with in the diaries as would be expected where people have been asked to record their normal everyday activities. The different categories of meals and drinks were based not only of the obvious demarcations for time of day, such as breakfast, lunch, dinner but also upon the reason for the meal or drink. There were the straight forward routine meals for sustenance; the companionable meals of partners; the cups of tea and coffee with a neighbour or friend giving opportunities to catch up on what has been happening in their lives; 'thank you meals' as a reciprocation for an act of kindness by another person (as discussed in the section on reciprocity); food as a reward to themselves for completing a chore; post activity drinks – either solo as a pause in a busy schedule or as a group if it is after a group activity. Below are some examples of different types of meal and drink activities as described by the diarists:

### Routine Meals

In relation to routine meals, diarists gave the most detail regarding these as part of their morning rituals. It seems that most diarists had this set, along with their morning ablutions, but there was more flexibility in relation to meals during the rest of the day. These appeared to be an anchor for the diarists which started the day off in a familiar way, daily.

- *7.30 Tea and Breakfast of usual fruit and cereals. How can people only eat one variety of cereal.* d5w1s1
- *06.30 hrs Breakfast (cornflakes and blue top milk) two rounds of brown bread/Jam* d7w1s1
- *8.30 Breakfast - porridge, yoghurt, peaches 2 toast & marmite & tablet!* d11w1s2

### Companionable Meals

These are described mainly for diarists who are living with partners, as a fairly regular occurrence. The exception, being diarist 7, who is a widower, who makes tea for his son several times a week for when he comes home from work. These meals mainly are described in positive terms and seem to be very enjoyable for the diarists.

- *7am my husband got up, made tea and brought it back to bed where we drink it whilst doing the crossword in yesterday's newspaper. This a luxury you haven't time for when you go to work.* d13w1s1
- *13.00 We sat out on the deck in the sun with olives and chilled white wine, then I went to pick salad leaves and chives and wild garlic and made a green omelette (spinach and chives) and a mixed salad for lunch.* d1w1s6
- *5.10pm Sat & had hot drink with [Husband] & generally chatted about the day. [Husband] cooking evening meal* d14w1s2
- *12.30 Lunch. Had a surprise for lunch my husband had been out to the supermarket and bought home a smoked mackerel (lovely!!)* d8w2s6
- *1900hrs Main meal together with son* d7w1s2

### Food or drink as a self-reward or incentive

Several of the diarists mentioned having a drink or snack during or after engaging in an activity which required some physical or mental effort. Diarist 14 and 2 below demonstrate this in relation to mental effort, including writing the diaries for this project. Diarist 9, in relation to the physical effort of taking her cat to the vet, (along with the shock of discovering the cat had worms).

- *5pm Writing diary - & rewarding myself with a hot chocolate! I would love to eat a bar of chocolate!* d14w2s1
- *10.30 Coffee time. Coffee and shortbread then sent off emails to my son, also to friend in America.* d2w2s2
- *11.00 Home for a well-earned coffee for me + sleep for cat.* d9w2s2

For some this seemed to be a form of pacing, for others, more of a motivation to engage, or a positive 'pat on the back' for having got through something onerous. Some of the 'must do' activities were followed by this type of break, which was suggestive of self-reward for getting through something they did not enjoy doing.

- *10.15 Put out washing on line and had a coffee break.* d8w2s5
- *9.15 Short journeys to the tip This takes until 12.30 (coffee stops have to be allowed for)* d2w1s3

### Drinks/meals with friends:

These seemed to serve three different functions for the diarists:

1. Meeting with friends specifically to 'catch up on news'
2. To provide a 'back-drop' to help activities go more smoothly, such as event planning or meetings
3. Occurring after other activities to continue the social contact

The function of catching up is quite prevalent throughout the diaries, suggesting that social meals with friends in restaurants or pubs is a mainstay for ensuring the continuity of those friendships. See the two examples below. It may be that these serve different functions for those with partners and those without i.e. for those with it gives the opportunity to speak freely about their partners and home life, for those without it could provide more opportunity to get out into the community.

- *6.00pm the 3 of us have a lovely meal and a glass of wine. Also a lot of catching up as she's been away 3 months. It really is good to see her again.* d13w1s6
- *5 pm Met [friends]. Had a meal & drink & caught up on our news.* d6w2s2



The diarists demonstrated enjoyment of the occasions when they went out for meals and drinks, even when this was part of another activity, such as Woman's Institute meeting mentioned by Diarist 2 below; or the Seniors' meeting explained by Diarist 3.

- 1.00 ...An enjoyable light lunch where we could discuss the exhibition, discuss our September WI meeting... d2w2s3
- 10.30 Seniors. Meeting of pensioners in the library to have coffee/tea & a talk. Really meant for less mobile folk but friendly and informal d3w1s2

In relation to post activity meals and drinks, this tended to be in relation to drinks after physical leisure pursuits, such as walking groups, badminton, and keep fit, to keep a group of people who only meet up for that activity together for a while longer.

- 12.15 Coffee post walk with group. d9w2d1

### *Religious Activities*

Not all the diarists mentioned religion but for five, in particular, religious activities were an integral part of their everyday life. These offered a sense of continuity for them as they have been engaged in the same religious activities for a large part of their lives, maintaining these into retirement. Diarist 3's religious observance was noted within her daily routines, where she wrote about saying her prayers every morning and night, she also regularly attended mass almost every day of the week. Interestingly she did not decide to complete an in-depth sheet on any of her religious activity – perhaps it was such an ingrained part of her pattern of activities, and seemed to be the activity around which everything else fitted, that was it difficult to reflect on.

Diarist 2 attended church services once a week on a Sunday, except when she had her grandchildren to stay. The church she attended held many memories for her and offered continuity with the past, as she explains below:

- 8.00 Service. This is my family church – my parents were members for 66 years, so there are memories all around me in there. I have also been a member for most of my life. I do know the majority of people who come at that time, but can't say the same for other services. Why do I go each week? It gives me space to re-charge for the week. I have so much to be thankful for – my health and strength, the fact that I am able to live a busy life... d2w1s6

Diarist 8 also went regularly to church for communion and taught at the local Sunday school for children, again this offered continuity with the past for her – she had been an active member of the church and taught at the Sunday School for 50 years. She was a Primary School Teacher before she retired, so the continuation of Sunday School was even more congruent with past patterns of activity. She enjoyed her continued teaching role within the church community, as shown in the excerpt below:



- *I love doing Sunday School but realise how numbers have dropped over the years. Still we have our regular little group aged 3 – 16yrs. It really is good to see the older children still like to come, Sunday School is so very satisfying for me and the helpers and parents who attend as well.* d8w1r7

Diarist 11 went to church once a week, although she seemed to have some reluctance regarding her attendance when she started off each week. She saw herself as a committed Christian and saw the regularity of her church attendance as a lynch-pin activity in her life, but the actual event itself had an unplanned flow to it, and it was this possibility of new acquaintances, new conversations, which seemed to keep her constant, as explained below:

- *9.45 Off to church...Been attending church for years with varying degrees of satisfaction/fulfilment. I find I'm always on the lookout to see why I'm meant to be going to this building every week & yet always by the time I return home I find there's always been a purpose/someone I've met, some word/song which has 'spoken' to me.* d11w1d1

Diarist 17 had a different type of faith, as she was a Quaker and also a Subud member. Despite the differences to the more 'usual' Christian faith displayed by the other diarists who discussed religion, the central role it took in shaping Diarist 17's pattern of activities was still apparent. It was a constant in her life, even if other areas were disrupted. She had chosen her living arrangements because of the shared philosophy (and associated activity) within the setting; and to support her elderly uncle who lived there, and also engaged in Latihan a shared spiritual experience without a particular religious creed (SubudBritain, 2014). Alongside this, she engaged in Quaker meetings as well. Alongside the spirituality of the experiences, she also valued greatly the social aspects of her involvement in these religious communities, see her comments in the excerpts below, about both sides of her faith – Quaker and Subud.

- *8.00 Got up – made bed, washed, dressed. Went to look for [Friend] is a 94 – year old Quaker who lives at [Retirement Village]. Her friend takes us both to Quaker meeting (sometimes)... 10.30-12.00 Meeting for worship (1 hour) in [Centre] – then socialising after in the Meeting House. Lovely being with these very warm –hearted & friendly people* d17w1s3
- *In the evening I went to Latihan...This is the core experience of my spiritual life. I go to Latihan twice weekly (though I wouldn't normally go twice in a day, as on this Monday).* d17w1r4

### *Appendix 11 References*

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## Appendix 12: Copy of Ethics Approval Letter



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Our ref: JW/lt

01 May 2009

Elaine Chamberlain  
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Post Station 5

Dear Elaine

**Application number: HSC/09/04/24**

**Application title: Occupational Balance in the Third Age -  
conceptualisation and relationship to Quality of Life**

Your ethics application was considered at the School Research Ethics Sub-Committee meeting of 28<sup>th</sup> April 2009 and based on the information provided was given ethical approval to proceed with the following conditions:

1. B11 & B12 – The Committee feels that there could be potential for participants to become distressed and would like the researcher to think about what procedures she would put in place should this arise.
2. B14 – If any problems were identified the Committee suggests that it would be better for participants to seek advice in the first instance from the Older Persons Forum and not the GP.
3. Information sheet - There needs to be a contact for the participants on the information sheet if they need to report a problem about the research, this would usually be one of the supervisory team.
4. The Committee has some concerns that the sampling is not completely representative of the population and would like the researcher to work with her supervisor on this point. The committee does not expect a response on this matter as it is a methodological issue which can be addressed by discussions with the supervisory team

If these conditions include providing further information please do not proceed with your research until you have full approval from the committee. You must notify the committee in advance if you wish to make any significant amendments to the original application.

Please note that all information sheets and consent forms should be on UWE headed paper.

**bettertogether**

University of the West of England, Bristol  
Vice-Chancellor Professor Steven West