

Protocol for Conducting an Activities Assessment Interview and Completing the Activities Assessment Form

Purpose of the Activities Assessment Interview

The Activities Assessment Interview and form can be used to identify the participant's activity preferences and to develop content for an Individualized Support Plan. The interview and form may also be useful in gathering research/evaluation data.

Participants

Use the Activities Assessment Form to guide your interview. Ideally, the interview will include the focus participant and at least two other people who have lived with or had daily contact with the focus participant during the three-month period preceding the date of the interview. (These other people are hereafter referred to as "anchors.") The anchors may be family members, staff members, guardians, advocates, or others who have knowledge of the focus participant's daily activities. If the focus participant chooses not to participate, interview the anchors.

Typically, the anchors would provide interview information only when:

1. The focus participant does not respond to a question, or
2. At least one of the anchors believes the information reported by the focus participant is incorrect. In this instance at least two of the people (i.e., both anchors; or one anchor and the focus participant) should agree on the accuracy of the information. (For example, if you are asking how often the focus participant did a particular activity during the last 3 months, at least two people should reach agreement on the answer.)

Conducting the Activities Assessment Interview

The Activities Assessment Interview is conducted with the aid of the Activities Assessment Form. The interview is used to gather information about the home and community activities the focus participant has and has not experienced. The first column of the form includes a list of activities. The list of activities is arranged in two broad "domains": (1) Leisure and (2) Personal Management. Within each domain, there are categories of activities. For example, the first activity is "watch television," which is the first activity in the "Media" category of the Leisure domain.

The form includes sections that allow you to (a) record a "preference rating" for an activity; (b) list "critical features" of activities; (c) record approximately how often ("frequency") the focus participant has done the activity, on average, during the preceding 3 months; (d) note

the location where the focus participant usually does the activity (i.e., community or home); and (e) whether the focus participant requires support to do the activity.

The form includes activities the focus participant may have never experienced (e.g., playing golf), however, you may discover that the focus participant would be interested in trying a previously unexperienced activity. The list also includes activities that most people do, but that may be unlikely to be perceived as "preferred" (e.g., paying bills).

Phrase your questions in a manner that is likely to be understood by the focus participant and the anchors. In general, your job is to (a) read aloud the name of an activity; (b) determine the preference rating for the activity; (c) determine critical features associated with the activity; (d) determine approximately how often the focus participant did the activity, on average, during the preceding 3 months; (e) note whether the focus participant usually experiences the activity in the community or in the home; and (f) note whether the focus participant requires support to do the activity. The focus participant and the anchors may find it helpful if you give them blank copies of the Activities Assessment Form that they can refer to during the course of the interview. Information about each section of the form is provided below.

Activity preference rating. Here is how to complete the preference section of the form:

- + Place a check mark in this column if this is an activity the focus participant generally prefers (enjoys)
- ? Place a check mark in this column if this is an activity the focus participant seems to feel neutral or unsure about
- Place a check mark in this column if this is an activity the focus participant generally dislikes.
- NA Place a check mark in this column if this is an activity the person *has never experienced*. (If the person says she or he would like to *try* the activity, place a plus mark ["+"] rather than a check mark in the NA column.)

"Critical Features" of the activities. The next column of the form provides a space to record information about "critical features" of the activities. *Typically, you will use this section of the form only for those activities that have been assigned a positive ("+") preference rating.* However, you may also use it to record critical features of activities that have been assigned a negative ("-") preference rating (as described below). Do not complete this section of the form for any activities that have been assigned an uncertain ("?") rating, or any activities the person has never done ("NA"). Critical features usually are specific aspects of a generally preferred activity that make the activity even *more* preferred.

In some cases the *specific instance* of an activity is a critical feature. For example, listening to the radio is an activity; but tuning in a particular radio program, such as "Morning

Edition" or "Blues Power," is a specific instance of the activity. Likewise, "Space Invaders" may be the preferred specific instance of the activity of playing video games. Similarly, preparing black bean soup is a specific instance of the activity of preparing a meal. In cases where the focus participant has a preference for an activity in general, he or she may also have a preference for one or more particular instances of that activity.

For many people, the *specific community location* where an activity is done will be a critical feature. For example, the focus participant may prefer shopping for groceries at Safeway rather than Albertson's, or may prefer jogging through a shaded park rather than on a sunny oval high school track.

The focus participant may have preferences concerning the *specific day and time* he or she does an activity. For example, he or she might prefer to go jogging on Monday, Wednesday, and Friday; or might prefer to jog in the evening rather than in the morning.

For some people, *activity companions* may be a critical feature of an activity. Even though the focus participant may generally prefer going to jazz concerts, she or he might prefer the jazz concert even more when going with a specific friend who also likes jazz. Most people prefer to do activities with companions who share their interest in that activity.

If relevant, you may identify critical features of any activities that were marked with a minus (-), if the focus participant and the anchors can think of specific aspects of the activities that make them disliked. For example, the focus participant might like most video games, but might dislike playing the Space Invaders games because of the noises it makes.

Record the critical features of activities by simply asking the focus participant and the anchors if they can think of things that make the activity more preferred (or disliked). This would make it easier to develop Individualized Support Plan objectives that are tailored to the focus participant's preferences, if relevant.

Approximate frequency of activities during last 3 months. These columns provide space to note approximately how often, over the last 3 months, the focus participant has done the activity. The coding scale for noting the approximate frequency of the activities is as follows:

- D Place a check mark in this column if this is an activity the focus participant did approximately *daily* (or more often) during the last three months
- 2W Place a check mark in this column if this is an activity the focus participant did approximately *twice a week* during the last three months
- 1W Place a check mark in this column if this is an activity the focus participant did approximately *once a week* during the last three months

- 2M Place a check mark in this column if this is an activity the focus participant did approximately *twice a month* (i.e., once every other week) during the last three months
- 1M Place a check mark in this column if this is an activity the focus participant did approximately *once a month* during the last three months
- <1M Place a check mark in this column if this is an activity the focus participant did approximately *less than once a month* (but did do at least one time) during the last three months
- 0 Place a check mark in this column if this is an activity the focus participant did not do even once during the last three months (Note: Any activity that has been assigned a preference rating of "NA" should have a frequency rating of "0".)

Usual location of activity. Use this section of the form to note where the focus participant typically does the activity—either in the Community or in the Home. Community activities are activities that happen beyond the property boundaries of the residence. Complete this section only for activities the person experienced at least once during the last 3 months.

Support required? Use this column to record whether the focus participant requires support to do the activity. Complete this section only for activities the person experienced at least once during the last 3 months. A person requires support when she or he needs help to initiate, do, or terminate the activity. For example, in the case of community-based activities, transportation to or from the activity is one type of support a person might need.

The rating scale is simple. Make a check mark if the person requires support. Mark the space with a zero (0) if the person does not require support. Leave the space blank if the person did not experience the activity at least once in the last 3 months.

If you prefer a more precise scale to indicate the level of support, you could consider using a level-of-supports scale (e.g., intermittent, limited, extensive, pervasive). One set of operational definitions for such a scale can be found in *Mental Retardation: Definition, Classification, and Systems of Supports*.

American Association on Mental Retardation. (1992). *Mental retardation: definition, classification, and systems of support* (9th ed.) Washington, DC: Author.

Activities Assessment Form

Date: _____
 Focus Person: _____
 People Interviewed: _____
 Interviewer: _____

Activity Name	Critical features of Activity? - What specifically makes the activity enjoyable (or disliked, if applicable)? - Activity, instance, location, day & time, companions, etc.	Pref. Rating		Avg. frequency last 3 mos.				Usual Location		Support?	
		+	-	D.	2Y	1Y	2M	1M	<1M		0
1.1 LEISURE - MEDIA											
1.1.1 Watch television											
1.1.2 Listen to radio											
1.1.3 Play records/cassette tapes											
1.1.4 Listen to cassette player											
1.1.5 Watch slides/home movies											
1.1.6 Use video cassette player											
1.1.7 Read/view books, newspapers, magazines, etc.											
1.1.8 Listen to talking books											
1.1.9 Use computer											
1.2 LEISURE - EXERCISE											
1.2.1 Walk (on foot or in wheelchair)											
1.2.2 Jog											
1.2.3 Ride a bike											
1.2.4 Ride an exercise bike/treadle track/cycling machine											
1.2.5 Participate in exercise/aerobics											
1.2.6 Participate in aerobic/aerobic/aerobic/aerobic											
1.2.7 Use rebounder/jumping											
1.2.8 Participate in aerobic/aerobic/aerobic/aerobic											
1.2.9 Participate in aerobic/aerobic/aerobic/aerobic											
1.2.10 Participate in aerobic/aerobic/aerobic/aerobic											
1.2.11 Participate in aerobic/aerobic/aerobic/aerobic											
1.2.12 Participate in aerobic/aerobic/aerobic/aerobic											
1.2.13 Participate in aerobic/aerobic/aerobic/aerobic											
1.2.14 Participate in aerobic/aerobic/aerobic/aerobic											
1.2.15 Participate in aerobic/aerobic/aerobic/aerobic											
1.2.16 Participate in aerobic/aerobic/aerobic/aerobic											
1.2.17 Participate in aerobic/aerobic/aerobic/aerobic											
1.2.18 Participate in aerobic/aerobic/aerobic/aerobic											
1.2.19 Participate in aerobic/aerobic/aerobic/aerobic											
1.2.20 Participate in aerobic/aerobic/aerobic/aerobic											
1.2.21 Participate in aerobic/aerobic/aerobic/aerobic											
1.2.22 Participate in aerobic/aerobic/aerobic/aerobic											
1.2.23 Participate in aerobic/aerobic/aerobic/aerobic											
1.2.24 Participate in aerobic/aerobic/aerobic/aerobic											
1.2.25 Participate in aerobic/aerobic/aerobic/aerobic											
1.2.26 Participate in aerobic/aerobic/aerobic/aerobic											
1.2.27 Participate in aerobic/aerobic/aerobic/aerobic											
1.2.28 Participate in aerobic/aerobic/aerobic/aerobic											
1.2.29 Participate in aerobic/aerobic/aerobic/aerobic											
1.2.30 Participate in aerobic/aerobic/aerobic/aerobic											
1.2.31 Participate in aerobic/aerobic/aerobic/aerobic											
1.2.32 Participate in aerobic/aerobic/aerobic/aerobic											
1.2.33 Participate in aerobic/aerobic/aerobic/aerobic											
1.2.34 Participate in aerobic/aerobic/aerobic/aerobic											
1.2.35 Participate in aerobic/aerobic/aerobic/aerobic											
1.2.36 Participate in aerobic/aerobic/aerobic/aerobic											
1.2.37 Participate in aerobic/aerobic/aerobic/aerobic											
1.2.38 Participate in aerobic/aerobic/aerobic/aerobic											
1.3 LEISURE - GAMES/CRAFTS/HOBBIES											
1.3.1 Play cribball, video, cards, and LV, games/hand-held video games											
1.3.2 Play table games/cards											
1.3.3 Play pool/billiards											
1.3.4 Play pool/billiards											
1.3.5 Play pool/billiards											
1.3.6 Play cards											
1.3.7 Play lawn games											
1.3.8 Bowling											
1.3.9 Play shuffleboard											
1.3.10 Do puzzles											
1.3.11 Do needlepoint/crochet/knitting/embroidery/patchwork											
1.3.12 Make crafts/hobbies											
1.3.13 Do needlepoint/crochet/knitting/embroidery/patchwork											

Activity Name	Prof. Rating + 1 2 NA	Critical features of Activity? - What specifically makes the activity enjoyable (or disliked, if applicable)? Activity instances, location, day & time, companions, etc.	Avg. frequency last 3 mos							Usual Location Comm. Home	Support?
			D	2W	TW	3W	1M	<1M			
1.3.14 Drawing/painting/collage											
1.3.15 Take photographs											
1.3.16 Make scrapbook/photo album											
1.3.17 Do miscellaneous art project											
1.3.18 Build/manage collections (e.g., coins, stamps, rocks, etc.)											
1.3.19 Grow indoor plants											
1.3.20 Astronomy/constellation studies											
1.3.21 Wild life observation (e.g., bird watching)											
1.3.22 Fishing/hunting											
1.3.23 Fix a kite											
1.3.24 Play an instrument/sing lesson or practice											
1.3.25 Woodworking/furniture/wood carving											
1.3.26 Do mechanical repairs (e.g., car repairs, radio, etc.)											
1.3.27 Play miniature golf											
1.3.28 Garden/vegetable harvest											
1.4 LEISURE - EVENTS											
1.4.1 Attend church/synagogue activities (including weddings, activity groups, etc.)											
1.4.2 Attend live sports event											
1.4.3 Go to a movie											
1.4.4 Attend play/concert, other performance											
1.4.5 Attend club meeting											
1.4.6 Attend lecture											
1.4.7 Attend party/dance											
1.4.8 Play/love a party											
1.4.9 Participate in recreation class/instrument class											
1.4.10 Attend an exhibit/show (e.g., art, science, flower, dog)											
1.4.11 Go to a museum											
1.4.12 Use the library											
1.4.13 Go to Science Center, aquarium, planetarium, zoo, nature park, etc.											
1.4.14 Go to the park											
1.4.15 Attend religious celebration											
1.4.16 Watch a parade											
1.4.17 Attend a race/odds											
1.4.18 Go on organized tennis, ride or guided tour on bus/train/boat/air/merry											
1.4.19 Participate in scheduled outings/outing (typically by car)											
1.4.20 Go to beauty salon/spa											
1.4.21 Participate in scheduled vacation											
1.4.22 Use swimmer club/indoor/swim room											
1.4.23 Picnic											
1.5 LEISURE - VISITING/ACCOMPANYING OTHERS											
1.5.1 Write letter to family/friends/significant other											
1.5.2 Receive/make phone calls to family/friends/significant others											
1.5.3 Visit with family/friends/significant others											
1.5.4 Overnight visit with family/friends/significant others											
1.5.5 Community overnight activities with staff											
1.5.6 Accompanying staff attending to program business											
1.6 LEISURE - OTHER LEISURE											
1.6.1 Community outing (i.e., an activity that is not accompanied by staff)											
1.6.2 People watched/checked out (use only if no other activity applies)											
PERSONAL MANAGEMENT ACTIVITIES											
2.1 PERSONAL MANAGEMENT - SELF											
2.1.1 Dress/undress											
2.1.2 Take a bath/shower											
2.1.3 Use restroom											
2.1.4 Care for hair (e.g., washings, dreads, braiding, styling, etc.)											
2.1.5 Complete AM routine											
2.1.6 Complete PM routine											
2.1.7 Manage dental hygiene (e.g., brushing/flossing/twice a day)											
2.1.8 Manage menstrual hygiene											
2.1.9 Shave											
2.1.10 Basic care of nails (e.g., clip, polish, file, etc.)											
2.1.11 Use deodorant/cologne/perfume											
2.1.12 Apply makeup											
2.1.13 Care for prosthetic device											
2.1.14 Handwashing											
2.2 PERSONAL MANAGEMENT (e.g., repositioning/transferring self, applying/removing prosthetic device)											
2.2.1 Use fast food restaurant											
2.2.2 Use sit-down restaurant/bar											
2.2.3 Use cafeteria/snack shop											
2.2.4 Use street vendor/concession stand											

Activity Name	Critical features of Activity? - What specifically makes the activity enjoyable (or disliked, if applicable)? Activity features, location, day & time, companions, etc.	Prof. Rating + 7 - NA	Avg. frequency, last 3 mos. D 2W 1W 2M 1M <1M 0	Usual Location Comm. Home	Support?
2.2.5. Use vending machine					
2.2.6. Plan meals					
2.2.7. Buy and store groceries					
2.2.8. Prepare a meal					
2.2.9. Eat a meal					
2.2.10. Purchase a snack/coffee/beverage					
2.2.11. Prepare a snack/food item/coffee/beverage					
2.2.12. Store leftovers					
2.3 PERSONAL MANAGEMENT - SPACE AND BELONGINGS					
2.3.1. Shop/buy personal items/supplies (toiletries, linens, etc.)					
2.3.2. Purchase a service (e.g., dry cleaning, watch repair, etc.)					
2.3.3. Wash/dry/drop off clothes					
2.3.4. Maintain wardrobe (e.g., ironing, mending, steaming, etc.)					
2.3.5. Straighten out a room (general tidying/straightening up)					
2.3.6. Make bed					
2.3.7. Change linens on the bed					
2.3.8. Clean the bathroom					
2.3.9. General kitchen cleaning (cleaning dishes, table, stove, refrigerator, etc.)					
2.3.10. Wash/drop off the dishes					
2.3.11. Floor care (e.g., sweep, wax, vacuum, mop, shampoo floor)					
2.3.12. Furniture care (e.g., dusting, polishing, etc.)					
2.3.13. Clean windows					
2.3.14. Empty garbage					
2.3.15. Recycle items					
2.3.16. Do yard chores					
2.3.17. Care for pet (feeding, grooming)					
2.3.18. Hold/bring yard sale or flea market					
2.4 PERSONAL MANAGEMENT - PERSONAL BUSINESS					
2.4.1. Budget money					
2.4.2. Banking					
2.4.3. Manage a personal schedule/routine					
2.4.4. Pay bills/taxes					
2.4.5. Mail letters (warranties, rebates, subscriptions, etc.)					
2.4.6. Make business phone calls (to arrange repair, transportation, make appointments, etc.)					
2.4.7. Use social services agencies and other professional services					
2.4.8. Self administer medication					
2.4.9. Use medical/dental services					
2.4.10. Respond to medical emergencies/miscellaneous emergencies					
2.4.11. Respond to fire drills					
2.4.12. Handling all other personal business affairs					
2.4.13. Community contribution (e.g., volunteer at food bank, attend advocacy rallies, etc.)					
2.4.14. Vote					
2.4.15. Rent/lease item (e.g., video, lawnmower, carpet cleaner)					
2.4.16. Basic first aid					
2.5 PERSONAL MANAGEMENT - PERSONAL CARE SERVICES					
2.5.1. Get hair cut/shaved/trimmed					
2.5.2. Get a manicure/pedicure					
2.5.3. Get a massage					
2.5.4. Get a "make-over"					
2.5.5. Get a facial					
2.5.6. Visit a beauty spa (e.g., mineral bath, spa, body wrap, mud bath, etc.)					