Occupational therapists face a challenging task with the evaluation of clients who do not speak English. The need to translate assessments into Spanish becomes important as Latinos come to the United States in record numbers. According to the 2000 census, people who are Latinos constitute 35.3 million (12.5%) of the U.S. population (U.S. Census Bureau, 2000), and they are the fastest growing minority group (Gonzalez-Calvo, Gonzalez, & Lorig, 1997). Since 1990, the Latino population in the United States has grown at a rate of 57.9%, and projections suggest that it will outnumber the nation’s combined total of African Americans, Asian Americans, and Native Americans by the year 2050 (U.S. Census Bureau, 2000). Yet very few health care measurement instruments have been translated into the Spanish language (Carlson, 2000).

The increasing number of Latinos in the United States has prompted some researchers to begin to translate measurement instruments, such as the Quality of Life Rheumatoid Arthritis Scale (Danao, Padilla, & Johnson, 2001), the Geriatric Depression Scale for use with Mexican American psychiatric clients (Baker & Espino, 1997), and the Sickness Impact Profile (Gilson et al., 1980), into Spanish. Although some progress has been made regarding the translation of instruments, the literature supports that a scarcity of reliable and valid instruments in Spanish remains (Zambrana, 1988).

Without appropriate, targeted evaluation using suitable assessments, treatment efforts for non–English-speaking Latinos may be misdirected. Wardin (1996) examined how occupational therapists (N = 103) verbally evaluate clients with limited English proficiency in a sample where Spanish was the most common language of the non-English speakers. She found that therapists took longer to evaluate clients who did not speak English fluently and were less sure of treatment needs for non-English speakers. This article describes the process of translating the Role Checklist (Oakley, Kiellhofer, Barris, & Reichler, 1986) into Spanish, presents the overall results of the translation, and reports the reliability between the English and Spanish versions.
Description of the Role Checklist

The Role Checklist is a two-part self-administered assessment that takes 10 to 15 minutes to complete. Part I assesses participation in 10 major life roles (role incumbency in the past, present, and future). Part II measures the degree of importance the individual attaches to each role (role value). The 10 life roles are student, worker, volunteer, caregiver, home maintainer, friend, family member, religious participant, hobbyist/amateur, participant in organizations, and other. Each role is accompanied by several examples that help define the role.

The roles used in the Role Checklist originally were obtained by a review of the literature in social psychology, sociology, and occupational therapy and were only included if they represented productive or playful use of time (Oakley et al., 1986). Excluded roles were those that described types of relationships (i.e., sister, cousin) or the absence of an identifiable occupation (e.g., retiree). On the basis of feedback from occupational therapy graduate students, faculty members, and practitioners, the content validity of the proposed role taxonomy in the Role Checklist was supported (Oakley et al., 1986). It was recommended that each role be defined to avoid sexual stereotyping and that some roles should include frequency criteria.

A study of test–retest reliability of the Role Checklist indicated that it is satisfactorily stable (kappa = 73%–97%) with a group of healthy adults (Oakley et al., 1986). The instrument has been used in several studies in occupational therapy where role evaluation is of interest, including role incumbency in persons with serious mental illness (Haertlein & Stoffel, 2000; McElwee, 1999); role perceptions of mothers with young children (Crowe, Vanleit, Berghmans, & Mann, 1997); comparison between the roles of community-living persons and patient populations (Dickerson & Oakley, 1995); the relationship of role meaning, frequency, number, and preference to life satisfaction in adults (Brantholm & Fugl-Meyer, 1992) and older adults (Elliot & Barris, 1987; Watson & Ager, 1991), the roles and lifestyles of persons with obsessive–compulsive disorder (Bavaro, 1991), and roles and occupational function in adolescents (Barris et al., 1986).

The purpose of the present study was to (a) translate the Role Checklist into Spanish so that it can be used to gather information regarding the roles of Spanish-speaking clients and (b) demonstrate the usefulness of a translation method. To ensure that an instrument has valid and reliable language translation, a thorough translation method must be used. The translation method is a modified version of that Hachey, Jumoorty, and Mercier (1995) used when they translated the Role Checklist into French.

Method

Procedure

A modified version of the method Hachey et al. (1995) proposed was used to translate the Role Checklist from English to Spanish. This method enhances the validity and reliability of the translated Spanish version as outlined here.

Step I. Preparation of a preliminary version in Spanish and a parallel back translation. For the first step, the first author translated the Role Checklist into Spanish. Next, a bilingual occupational therapist unfamiliar with the original Role Checklist translated the Spanish version back to English (back-translated version). This second part confirms that the back-translated version (English) had the same content as the original English version. This step resulted in a preliminary Spanish version and an English back-translated version to be examined by a committee to establish content validity.

Step II. Committee and expert review of the preliminary version in Spanish and preparation of an experimental version. A four-member committee then examined the original Role Checklist, the back-translated English version, and the preliminary Spanish version to determine congruency in language. Committee members were the first author, two bilingual occupational therapists, and one bilingual registered nurse. They represented different Latino backgrounds in an effort to reduce language and understanding biases. The first author is Puerto Rican, the nurse was Mexican, and the occupational therapists were Puerto Rican and a non–Hispanic White who studied Spanish in Spain.

After reviewing all three versions of the assessment, the committee discussed changing one word in the preliminary Spanish version. The word besides, which according to the American Heritage Dictionary (Pickett, 2000) means “in addition,” also could mean “next to something.” The first author translated the word directly as ademas, which means besides in English. A committee member suggested that the word be replaced with al lado de, which means “next to something” and is a more accurate translation of usage in the original English version.

After the committee’s review, a bilingual Cuban professor of Spanish at a local university reviewed the preliminary Spanish version and original English version of the Role Checklist for suggestions for further changes. After reviewing both versions, the professor identified one common mistake overlooked by the committee. The word attend was originally translated into Spanish as atendiendo. This Spanish word means to attend or pay attention to a certain person and not to a certain task or activity as in attending school. For example, “una esposa puede atender a su esposo” means a wife can attend her husband as in the first meaning. Atendiendo was changed to asistiendo, which means to attend to a certain task or activity, such as school, work, or a hobby. This meaning is a more accurate reflection of the context of the assessment. With this change, the experimental Spanish version of the Role Checklist was complete.

Step III. Pretest of the experimental version. Five persons from a Latino church were recruited to evaluate the content of the experimental Spanish version of the Role Checklist. Spanish was the primary language of all participants in this step. Participants were instructed to circle any words that did not make sense to them. No words were circled in the pretest, and the committee did not have to reconvene to make changes.

Step IV. Content validity. Committee members and the Spanish professor met one more time to review and verify the content of the experimental Spanish version of the Role Checklist.
Step V. Test–retest reliability. Fourteen bilingual participants then completed the original English version and the experimental Spanish version of the Role Checklist, with a 2-week interval between administrations. This step measured the ability of both test versions to elicit equivalent responses in both languages for bilingual participants.

**Participants**

The participants for the test–retest reliability study were recruited from a Spanish for Native Speakers class at the authors’ university. Inclusion criteria were being bilingual and the first generation of their families to be U.S. residents. The participants were 5 men and 9 women who range in age from 18 to 35 years ($M = 22.4$ years, $SD = 16.5$). All participants used both languages frequently in their daily lives. Most spoke Spanish at home and English in school or during work.

The Spanish professor at the university recruited the participants according to the criteria and confirmed state of bilingualism. Completing the Role Checklist was optional and not a course requirement. Each assessment included a cover sheet with a four-digit identifying code. After the English and Spanish assessment pairs for each participant were matched, a different untraceable code was assigned to each pair to ensure anonymity. The Institutional Review Board for the Protection of Human Subjects at the university approved the procedure.

**Data Collection**

The procedure was explained, and if a student agreed to participate in the study, a consent form was signed and the Role Checklist administered. All 14 participants completed the Role Checklist in both Spanish and English. The Spanish version was administered first followed by the English version 2 weeks later consistent with the method that Hachey et al. (1995) used.

**Data Analysis**

The kappa statistical measure was used to analyze the test–retest reliability. This chance-corrective measure of agreement was chosen for this study because it was used in the original study of the Role Checklist by Oakley et al. (1986) and by Hachey et al. (1995) when translating the assessment into French. The guidelines shown in Table 1 were used for the interpretation of kappa as described by Landis and Koch (1977).

**Results**

The intralanguage correlation between the English and Spanish versions of Part I was considered almost perfect (kappa = .907). The intralanguage correlation between the English and Spanish versions of Part II was considered substantial (kappa = .798) (see Table 1).

**Discussion**

The overall results for the test–retest reliability of almost perfect for Part I and substantial for Part II suggest that the Spanish version of the Role Checklist can be used with the same confidence in its validity and reliability as the English version. The results of Part II are somewhat lower, and possible explanations are considered here.

The choices in Part I for role incumbency (past, present, future) are concrete and straightforward. For example, an individual can consistently identify whether he or she has been a student in the past, is currently a student, or anticipates being a student in the future. In Part II (role value), the choices of not at all valuable, somewhat valuable, and very valuable are subject to different interpretations at different times. That the checklist was readministered after a 2-week time span could explain the inconsistencies in the role values of student, volunteer, and religious participant. For example, a person might value the role of student as somewhat valuable at a given time, but on acceptance into graduate school or receiving an A on a test, the perception of the role of student may change to very valuable. The scores in Part II might also be affected, as Hachey et al. (1995) suggested, by the repetition of roles already addressed in Part I, an aspect that might diminish the participants’ interest and attention while completing the second part of the assessment.

**Conclusion**

This study demonstrated the effectiveness of a translation methodology and resulted in a content valid and reliable Spanish version of the Role Checklist. The availability of reliable and valid occupational therapy assessments in the Spanish language allows therapists to better serve their Spanish-speaking clients. With Latinos as the largest and fastest growing minority population in the United States, it is important that Spanish-version occupational therapy assessments be available to assist in directing treatment efforts specific to Spanish-speaking clients. The methods that Hachey et al. (1995) proposed as applied in this study involve a thorough process for establishing reliable and valid translation of assessments. With the increase in numbers of persons from other cultures migrating to the United States, these techniques can help clinicians and researchers do more rigorous translation of assessments to better serve the needs of an increasingly diverse client population.

**References**


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**Table 1. Guidelines for the Interpretation of Kappa**

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<th>Kappa Statistic</th>
<th>Strength of Agreement</th>
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<tr>
<td>0.00–0.20</td>
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<tr>
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