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Evolution of Occupational Therapy Practice: Life History of Lance Norman

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Abstract

Objective. The purpose of this life history study was to gather information regarding the history and evolution of occupational therapy (OT) practice in North Dakota and Wyoming. The life history of Lance Norman and his influence in developing OT in North Dakota was one of 29 stories explored.

Method. The qualitative study used a life history approach. A semi-structured interview was conducted with the participant that was assigned to the researchers via a purposive sampling method. The interview was recorded, transcribed, and an open coding process was used for data analysis. To guide the research process the Kawa model was used as a theoretical base.

Results. Data analysis generated 26 codes. The codes were classified into three categories, including: academics, administration, and professional practice. Each category further reflected three to four themes. A single assertion was then determined to capture the essence of Lance’s life history.

Conclusion. Lance has a multifactorial role in the field of OT in North Dakota and Northwest Minnesota that encompasses academia, professional practice, and administrative duties. He continually strives for best practice by taking advantage of opportunities, and guiding the next generation of therapists to help the profession grow and develop.
Evolution of Occupational Therapy Practice: Life History of Lance Norman

The purpose of this life history study was to gather information regarding the history and evolution of OT practice in North Dakota and Wyoming. The life histories of individuals who have been influential in the development of OT in these two states was explored. A life history study in qualitative research identifies and documents health patterns of individuals and groups (Hagemaster, 1992). It allows the researchers to explore a person's experiences (microhistory) in relation to a specific time frame (macro-history). Approximately 29 interviews were conducted by second year OT students from the University of North Dakota. The life history of Lance Norman and his influence in developing OT in North Dakota was one of 29 stories examined.

The interview was conducted, recorded, and later transcribed at the University of North Dakota’s School of Medicine and Health Sciences. Lance has transformed OT in North Dakota and Minnesota for the last 27 years. The emphasis he places on academia and best practice is evident in the new and innovative techniques he brings to the area. Lance has had a prominent role in hand therapy and continues to make an impact in the field by fulfilling administrative duties today. This study is intended to aid in the understanding of the evolution of OT from its inception to current practice in North Dakota and Wyoming. It is anticipated that the life history process will be a powerful means to identify the development of OT from Lance’s perspective.

**Literature Review**

In 1997, massive disruption to OT practice formed from the Balanced Budget Act (BBA). The BBA made significant cuts to Medicare and created a cap of $1500 per person for outpatient OT services (American Occupational Therapy Association [AOTA], 2017a). At this time, Lance was practicing hand therapy at Altru Health System. Additionally, in the timeframe of his career, the OT practice framework was revised multiple times (AOTA, 2017a). Due to Lance’s close tie
with academia, the transition between frameworks was not challenging for him. Lance took advantage of each opportunity of growth in response to these changes experienced in the foundational elements of OT.

By the time all schools became compliant with the Accreditation Council for Occupational Therapy Education (ACOTE) requirement of advancing the entry-level for the field of OT to a master’s degree in 2008, Lance had already completed his Transitional Master of Occupational Therapy (TMOT) degree (AOTA, 2017b). Lance had pursued and accomplished his TMOT, and attained his degree in 2006. This again demonstrates the emphasis he places on academia, a value that was highly representative of his scholastic pursuit throughout his career.

In 2010, the Patient Protection and Affordable Care Act passed, allowing certain insurance plans to cover rehabilitation and habilitation (AOTA, 2017b). During this time period, Lance was the director of rehabilitation at RiverView Health. The passage of this Act significantly expanded health insurance coverage for millions of Americans (AOTA, 2017b). This momentous shift in healthcare history impacted how Lance was able to provide services for the consumers of RiverView Health, as well as altered the reimbursement and payment methods of therapy.

AOTA’s Centennial Vision reads as follows: “We envision that occupational therapy is a powerful, widely recognized, science-driven, and evidence-based profession with a globally connected and diverse workforce meeting society’s occupational needs” (AOTA, 2017b, para. 5). Lance’s drive for best practice, and use of evidence-based research, reflects the vision and advancement of the profession. His progression and evolution in a professional manner to align with the standards set forth by OT throughout his career is evident. The study is intended to
further enhance the connections formed between Lance’s life history and the history of OT in order to understand the correlation of the two on a grander scale.

**Theoretical Foundation**

The Kawa model was utilized as a guide throughout the research study. This model was originally designed to be used as a basis for discussion with clients (Turpin & Iwama, 2011). As the model describes, the river as a whole is used to describe a person’s life history (Turpin & Iwama, 2011). There are multiple elements within the river that represent various meanings, of which include: water, rock, driftwood, the river floor, the river walls, and the space between these objects. An individual’s ‘life energy’ is represented by the water flowing in the river (Turpin & Iwama, 2011). The river walls and river floor symbolize the contexts that surround the person, including the social and physical environment. According to Turpin and Iwama (2011), the rocks represent life circumstances that are perceived as problematic to the person. Personal attributes and resources are depicted by driftwood. Lastly, the space between the obstacles in the river emphasizes the importance of focusing on the space between the objects, rather than focusing on the objects themselves (Turpin & Iwama, 2011).

Turpin and Iwama (2011) expressed that the Kawa model uses the metaphor of a river to gain an individual’s perspective on their own life flow. Due to its applicability, the interview questions were formatted around these core concepts of the model. The study further used the Kawa model during the data analysis process to break down the participant’s life history by looking at cross-sections of the river throughout different times in Lance’s history. The snapshots derived from analysis of the cross-sections reveal integral elements that compose Lance’s river, which facilitated a greater understanding of the participant during his career as an occupational therapist.
Description of the Participant

Since imparting on his journey as a therapist, Lance has led an impressive career in the field of OT in which he has ventured down numerous paths. Towards the end of his first year of college, Lance started his journey of becoming an occupational therapist. He received his baccalaureate degree in OT from the University of North Dakota in 1990. Initially after graduating, Lance started his professional career working as a registered OT (OTR) at Washoe Medical Center in Reno, Nevada. After one year in Nevada, Lance moved back to Grand Forks and worked as an OTR at United Hospital. When Lance decided to pursue hand therapy, he transitioned to working at Altru Health System in Grand Forks as a hand therapist and OTR. Lance officially became a certified hand therapist (CHT) in 2000 after being mentored by hand surgeon Dr. Robert Clayburgh at Altru. After obtaining his new certification, Lance worked solely as a CHT at Altru.

In 2004, ambitious to enter private practice, Lance left Altru and pursued a new role as a CHT in a private clinic he helped establish. The private practice, known as Axis Clinic, was founded in Grand Forks. During Lance’s time serving as a private practitioner, he enrolled in a TMOT program at his alma mater. In 2006, Lance earned his master’s degree. Desiring to fulfill an administrative role, Lance discontinued his work in private practice after four years, and became the Director of Rehabilitation at RiverView Health in Crookston, Minnesota. Currently, Lance Norman is still employed by RiverView Health Care Association in Crookston, and serves as the Vice President of Clinics and Ancillary Services.

Aside from his impressive work history disclosed in the interview, Lance’s curriculum vitae (CV) provides a surplus of information that attests to his well-roundedness. For instance, Lance has served as an adjunct faculty member at the University of North Dakota instructing in
Physical Agent Modalities and an adult physical disabilities seminar. The importance he places on scholarly pursuit is evident, and reflected by an extensive list of continuing education courses that span the last 25 years. Lance also holds membership of organizations at a local, state, and national level. He also demonstrates major community involvement and service responsibilities by serving on various committees, being an affiliate of Crookston’s Lions Club, he also offers a scholarship in his name, known as the Lance and DeNae Norman RiverView Health scholarship.

Methodology

Study Design

This qualitative research study used a life history approach which allows the focus to be on the participant’s involvement in the evolution of OT practice. A life history study in qualitative research identifies and documents health patterns of individuals and groups (Hagemaster, 1992). This oral history approach allowed the researchers to explore the historical framework during Lance Norman’s career in OT.

Participant Selection

The participant was selected from a participant list compiled through purposive sampling by the Project Directors. Each participant was assigned to a set of second year occupational therapy students. Informed consent was obtained prior to the interview.

Data Collection

A semi-structured interview was conducted at the University of North Dakota’s School of Medicine and Health Sciences building. The interview was guided by an interview schedule prepared by the project directors. Questions on the schedule were designed to be used for all participants interviewed to ascertain cohesiveness of the larger project. The researchers, using the Kawa Model as a guide, were allowed to modify or add interview questions as needed for
their interview. No specific gatekeeper issues were identified because initial contact was made by Project Directors. This face-to-face interview was audio recorded and took place in a private conference room. The interview took approximately 1 hour and 40 minutes, with an addition 30 minutes from gathering background data from the participant’s CV. The interview was transcribed verbatim, which translated into approximately 29 pages of transcribed text.

**Trustworthiness**

In order to establish trustworthiness, the researchers used multiple strategies to meet the necessary criteria to complete a reliable and valid study. Credibility, or internal validity (Shenton, 2004), was established by debriefing during the analysis of data. Triangulation was also formed through having multiple data collection strategies, including individual interviews and review of documentation provided by participant (Shenton, 2004). To ensure confirmability, reflexive journaling was conducted throughout the entire research process. This internal dialogue allowed the researchers to gather insight on the information being collected, while at the same time creating an audit trail of the data analysis process (Berg & Lune, 2012). In addition, reflexive journaling provided evidence that the researcher’s bias did not skew the interpretation of what the participant disclosed.

**Data Analysis**

The interview was recorded, transcribed, and open coding was used to begin the data analysis process. Initial analysis of the interview generated 26 codes, which emerged into three main categories. The codes were grouped and re-grouped before three to four initial themes were developed for each category. An assertion was formed by condensing the themes. Lance has demonstrated adaptation to the evolution of the OT profession, and continues to adjust his work to align with the standards that are being set to advance the field of OT. In regards to the Kawa
Model, the categories represented different cross-sections within the participant's life, while the themes encompassed all the elements within the river, referring to the context of his career, along with his personal attributes, resources, and obstacles.

**Results/Findings**

Prior to initiating the coding process, inclusion and exclusion criteria were determined. For inclusion criteria, a code was established if a word with representative significance appeared more than twice in the interview. Some examples of codes continuously represented throughout the interview include: challenges, opportunities, support system, and research. In terms of exclusion criteria, codes were not recognized if the word held the same meaning as another code already established. The codes were then categorized into broad topic areas based on commonalities. Categories were identified as academia, professional practice, and administration. Each category represents a period in Lance’s career that is illustrated through cross-sections within his history. Academia was the foundation of Lance’s entire career as an occupational therapist. Throughout his professional practice and administration role, Lance continues to emerge as an influential occupational therapist in the state of North Dakota. The following themes embody Lance as an occupational therapist and give evidence to the underlying impacts of the profession’s history that are subtly intertwined.

**Academics**

*Gaining skill set to critique research articles.* Lance recognizes the importance of gaining the skill set to critique research articles. He expressed initially gaining the skills to understand and conduct research when receiving his TMOT. The benefits evidence-based research brings to OT is substantial, which is a recognition Lance did not realize the importance of until pursuing his TMOT. As an occupational therapist, it is crucial one knows how to comprehend the
research, or at the very minimum have someone on your team that knows how to. Lance expressed his skill set with the following statements:

...when I received my transitional master’s, my TMOT in 2006. It didn’t feel much different, however, that was in my practice. However, the way I analyze literature review of best practice is definitely different. Definitely gave me a much more keen eye on review of research.

...my ability to do analysis of even some statistical research like on best practice...to be able to filter through the data to take a look at whether this really has applicability, is important.

…really became I think more efficient in filtering through journal articles and/or actual research articles to find what is going to be able to… what’s going to present me in the best light.

Competency over degree. Lance believes competency is more valuable than the level of your degree. He portrayed mixed views about the requirements changing entry-level from a master’s to doctorate degree. In regards to the level of degree needed to become a practicing therapist, Lance shared:

To be a proficient practicing OT, to be able to get there in four, four and a half years, versus seven. What does that two, two and a half years bring to you as a practicing therapist?

He also stressed the importance of hands-on experience, and how competency comes from experiences:

...there’s the saying ‘You forget all you know.’ Like you get so proficient at some things, you never get proficient at everything, which is always good.

COTAS are invaluable because of their hands-on skill set. Often because they get face-to-face and hand-to-hand with patients nearly one hundred percent of the time.

Life-long learning. Lance emulates the notion that education is a life-long learning process. Occupational therapists need to remain to date on best practice, and continue refining their skills throughout their career. By doing so, it will ensure clients are receiving the best form of care available to them at that specific moment in time:

These are always nice to have (specialty certifications) too. It takes you to a certain new level that you can never be lax once again.

Professional Practice
Staying current with best practice. Lance finds staying current with best practice by using evidence based research is essential. Facilities should have protocols that revolve around evidence, and are constantly revised to stay up to date. On the other hand, Lance emphasized the challenge in remaining current in the field of OT for practicing occupational therapists:

There was no term of best practice, or value-based purchasing, and some other terms. But best practice is probably the one that hits home to us. Why did we do a certain thing therapy wise with a patient- say with a subluxed shoulder? It worked. It was what worked. Here, I’ll show you what works. Well now there is best practice to show evidence to that, so, it definitely has changed.

But just in practice in of itself, it is challenging to stay current. You know to stay current, whether you’re practicing full-time in medical practice seeing patients, or part-time, or for me just a patient or two at a time is all that I see, and to stay current in that.

Take advantage of resources. Lance conveyed taking advantage of resources as a vital concept of practice. Personal experience working with physicians has made him into the hand therapist he is today:

There’s nothing probably more valuable than an advanced practice provider or doctor that you can align with. They will tell you things you don’t want to know, and many times they will steer you along.

As far as professional growth, probably some of the things that were the most helpful for me was working when I was preparing and studying for my certification in hand therapy. Because of our small department, I had the ability to work with, go into Dr. Clayburgh’s and Dr. McCloud’s offices at the end of the day. They let me look through their books.

Another resource that has guided Lance throughout his career involves his tie to academia. He stressed the importance of staying affiliated with universities, in order to use the resources academics can provide you:

And then leaning on the academics here (UND). One of the positives of teaching, was access to the faculty and just bouncing things off... So to keep that tie academically has always been a professional growth piece for me that, that’s something I did do long ago.

I think wherever you may land, I think it’s always a positive to reach out to the nearest OT program and go there and meet the faculty. You may not have even graduated from that program, which may even be beneficial you get to see another world. And you may not be interested in teaching at all, you just show face. And they will reach out to you, I guarantee.

So it’s a very important professional piece. If nothing else, academics, the faculty, to be able to have access to them is critical. And the more important piece is students like you, that when we have the physical disability course that I taught, they are always pressing me.
Mentors. Lance believes mentors are an essential aspect to one’s professional development. Mentorships were embedded throughout each stage in the development of his career. Specifically, for Lance, these mentorships were faculty from the university and physicians from the specialized areas in which he practiced:

The more challenging the faculty were, the more I recall and remember them... She (Dori Markin) was challenging and rode me in this program. More than I believe other faculty did, by any stretch of the imagination.

I was a pretty idealistic new grad. And I was, thought I was pretty solid with spinal cord. Cause I was pretty heavily anatomy educated. So I knew my nerve roots and I knew my cervical levels etc. But that’s about all I knew, you know? So he educated me. *Referring to taking his first job post grad in Reno*

And he (Dr. Clayburgh) would just push, he was a pusher. In hindsight it was what I needed to have. He was good about it too. *Referring to Dr. Clayburgh prepping him for taking hand certification exam*

Opportunities. Being aware of all the opportunities in the field of OT is another core value of Lance’s. He expressed how a degree in OT may seem broad, however, it allows for many different avenues and possibilities as a practicing therapist:

Gosh, probably all of the opportunities. I don’t even think you can sit here now and understand the opportunities you’ll have in your thirties, forties, and fifties. Of the things that you can do outside of the scope of practice, or frames of reference, or theory, as far as occupational therapy approach. There’s things so far outside of that like legal, law, medical law that I dabble in a bit.

The opportunities, it’s hard. And if you’re like ‘Well that’s just going to dilute your degree.’ But you don’t. You’re ultimately among these tracks and you drop into something.

Administration

Cultivate a positive culture. A core value instilled in Lance is to cultivate a positive culture within the workplace. He feels that each team member is a valuable asset, and it is important to utilize each member of the team respectfully. He reflects these beliefs in the following statements:

...barely a day that I don’t ask one of my leaders, one of the directors of the six areas that I oversee, a question. I see them in the hall and will ask them something because they’re experts. I’m not an expert on diagnostic imaging, not an expert in medical practice or our clinics. We have 30 providers, doctors, and advanced practice providers, I’m not an expert in those areas.
And what things I’ve learned that didn’t work well, or worked well. Not giving them feedback in a timely fashion without it feeling as though it’s condescending and that they’re learning something rather than, ‘That’s not the way to talk to a staff member.’ ‘Well, how do I do it?’ ‘Well, not like that.’

**Opportunity to network.** In addition, he values the opportunity to network with other therapists. As a rural state, North Dakota sets a stage for therapists not having a constant support system to rely on. Whether you are a traveling therapist, or practicing in a less populated location, there are resources that can connect these therapists in order to keep them up to date with patient care and best practice:

I know the therapist out at the Devils Lake area I can do a hand-off to. We can’t do a face-to-face of course, just because of geographics, but to get onto the telephone and discuss patient care and then follow up on an email.

...but you’re working for Altru Health System, you travel to Devils Lake every day. By the time you come back at the end of the day the OT office is closed, so your ability to interact with your colleagues, you’ll lose skill set really quickly.

...I’m a member of about four organizations that have nightly email blasts. They call them e-blasts, and I can read it on my phone… So there’s therapists like you, you know I’m working in Laramie, Wyoming, I’ve had a referral, I have a burn patient and they’re talking about a brace or a splint. They get like 10 responses within an hour. Those tools are amazing… Try to find those outliers, like the therapists doing things out of the norm.

**Staying current to remain competitive.** Lance is an advocate of staying current to remain competitive against other facilities. He stressed on how best practice is the key in remaining a competitive health care facility:

So like if you’re going to do this, if you’re going to remain autonomous, we need best practice. We need evidence of, if you’re going to say, ‘You should go to Riverview for your hip.’ ‘Well why?’ ‘Well all the doctors are all nice.’ You know, they’re realizing as a board that stuff doesn’t fly.

Through the analysis of these themes and patterns, the researchers concluded the following assertion statement:

Lance has a multifactorial role in the field of OT in North Dakota and Northwest Minnesota that encompasses academia, professional practice, and administrative duties. He continually strives for best practice by taking advantage of opportunities, and guiding the next generation of therapists to help the profession grow and develop.
Discussion

This life history study contributes to the overall understanding of the history and evolution of OT practice in the state of North Dakota. Events in history, such as laws, advancements in associations, or overall economic issues, influence not only the profession as a whole, but the path in which a health professional’s career may go. Through the data analysis, researchers were able to concluded that Lance’s career timeline, along with his overall life history, aligns with the evolutionary changes in OT.

Lance’s ‘life energy’, or water flowing in the river, encompasses every aspect of his career. He was chosen for this particular study due to the context of his career being in North Dakota, which can otherwise be considered his river’s walls and floor. Lance reveals rocks that have been found throughout his career. For instance, when creating a protocol for hand therapists in the clinic, he faced problems that challenged his thoroughness. Lance reports the importance of using resources throughout his career, which attests to his personal attribute of providing quality care to clients, which reflects OT values and beliefs. Utilizing resources and his personal characteristics are represented by driftwood in the Kawa model (Turpin & Iwama, 2011).

Overall, Lance’s career has been formed by maintaining a strong focus on the space between the objects of his river to continuously advance his career.

In other words, Lance displays the elements of the Kawa Model through his personal attributes toward the field of OT, utilizing resources throughout his professional life, overcoming barriers, and making shifts throughout the course of his career in order to impact OT services within the state of North Dakota.

This life history study contributes to the overall understanding of the history and evolution of OT practice in the state of North Dakota. There is a lack of research in regards to
North Dakota’s influence in the field of OT, and further studies should explore this vital process in order to develop and expand OT as a profession.
References
Appendix

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Jade Clement, OTS & Miranda Hosking, OTS

Categories derived from codes:

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<thead>
<tr>
<th>Academics</th>
<th>Professional Practice</th>
<th>Administration</th>
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<tbody>
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<td>Resources</td>
<td>Best practice</td>
<td>Administration decisions</td>
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<td>Personal skills</td>
<td>Riverview</td>
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<td>Journey</td>
<td>Challenges</td>
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<td>Models</td>
<td>Leadership</td>
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<td>Prof. development</td>
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<td>Patient care</td>
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<tr>
<td></td>
<td>Opportunities</td>
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Themes derived from categories:

Administration
1. Cultivate a positive culture within the workplace
2. Network with other therapists
3. Stay current to remain competitive against other facilities
4. Strive to develop satisfying relationships between therapist and client

Academics
1. Importance of gaining a skill set to critique research articles
2. Competency is more valuable than the level of your degree
3. Education is a life-long learning process

Professional Practice
1. Staying current with best practice by using evidence based research.
2. Take advantage of resources.
3. Mentors are an essential aspect to your professional development.
4. Be aware of all the opportunities in the field of occupational therapy.

Assertion:

Lance has a multifactorial role in the field of occupational therapy in North Dakota and Northwest Minnesota that encompasses academia, professional practice, and administrative duties. He continually strives for best practice by taking advantage of opportunities, and guiding the next generation of therapists to help the profession grow and develop.