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Evolution of Occupational Therapy Practice: Life History of Sue Morrison

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### **Abstract**

This qualitative study gathered information regarding the evolution of occupational therapy in North Dakota and Wyoming. Its purpose was to provide a view of what practice looked like from the beginning of Sue Morrison's occupational therapy career until now by uncovering her life history. She has played an influential role in pediatric occupational therapy in Wyoming. The goal of this study was to provide more knowledge for current occupational therapists about the history of occupational therapy and how it has changed over time. This was done by interviewing individuals who have impacted the occupational therapy profession in the states of Wyoming and North Dakota. The participant for this study was selected through purposive sampling methods and used a one-hour interview conducted via the video-chat program Zoom. The interview was transcribed and analyzed by the researchers to uncover Sue Morrison's life history in order to learn more about the profession of occupational therapy. Essential aspects of Sue Morrison's career as an occupational therapist include her passion for education, her work as a pediatric occupational therapist and her desire to advocate for others and herself.

### **Introduction**

The purpose of this study was to look at Sue Morrison, MSOT, OTR/L, and the impact she had in practice within the state of Wyoming. The life history of Sue Morrison was one of 30 life history interviews conducted as a part of a larger project of *Life Histories of Individuals Who Have Been Influential in Developing Occupational Therapy (OT) in North Dakota and Wyoming*. The purpose of this project is to gather information about the history and evolution of OT practice from individuals like Sue Morrison who have been influential in developing OT in these two states. This study is intended to provide current and future generations of occupational therapists a view of the history and how occupational therapy practice has evolved from its inception to current practice in North Dakota and Wyoming. Data for the life history study was collected through an interview that lasted approximately one hour. The interview was conducted using a video-chat program called Zoom. The researchers were located in a small study room in the Student Union at Casper College in Wyoming. The life history of Sue Morrison is a case study guided by the Kawa model that examined her life as an OT practitioner and an educator.

### **Literature Review**

The literature review was conducted on relevant changes in regulations and laws that were occurring in the profession that affected Sue as an occupational therapist. The Individuals with Disabilities Education Act (IDEA) was originally passed in 1975 (Individuals with Disabilities Education Act, 2004). The purpose of IDEA was to provide free appropriate education for children with disabilities. The school district is expected to locate and evaluate all children with disabilities and educate them in the least restrictive environment (Individuals with Disabilities Education Act, 2004). IDEA ensures that children with disabilities are able to receive free appropriate public education and have available special education or related services that

will assist in their learning (Individuals with Disabilities Education Act, 2004). IDEA also provides parents and educators with the necessary tools to aid their children's educational abilities through supportive systems and coordinated research (Individuals with Disabilities Education Act, 2004).

In 1997 the Balanced Budget Act (BBA) was implemented which resulted in significant changes to Medicare reimbursement for home health, long-term care, and other treatment settings. The BBA placed a cap on payments per beneficiary, replacing cost-based reimbursement with a prospective payment system (PPS) (Komisar, 1997). PPS is a reimbursement method based on a predetermined, fixed amount from which Medicare payment is made (U.S. Centers for Medicare & Medicaid Services, 2018). Payment amounts can vary based upon the services being rendered. The changes in payments were put into effect in an effort to slow home health spending, which had previously been experiencing a rapid increase (Komisar, 1997). Other factors that may have contributed to the BBA being implemented were changing medical practices and the need for payment incentives that encouraged agencies to provide more consistent and effective care (Komisar, 1997).

AOTA moved for occupational therapy to be a post-baccalaureate level of education in April of 1999 during the Annual Conference & Expo (AOTA, 2014). The Accreditation Council for Occupational Therapy Education (ACOTE) voted to allow until 2007 for occupational therapy programs to offer the updated degree during their August meeting of 1999 after a lengthy debate on the short and long-term impacts of the decision (AOTA, 2014). This change in the required degree level also affected anyone in an educator position, as they would now be required to hold a master's degree to continue teaching.

### **Theory**

The Kawa model was used to guide this study and the interview process. This occupation-based model was developed from an eastern perspective and uses the metaphor of a river to represent one's flow of life and the challenges they experience (Turpin & Iwama, 2011). The river can be looked at as a whole which can be divided into cross-sections to represent specific points in one's life (Turpin & Iwama, 2011). These cross-sections consist of the river water, driftwood, rocks, the open space between the objects, as well as the walls and the floor of the river (Turpin & Iwama, 2011). In this model, the driftwood in the river is the personal attributes or resources that can be either good or bad in a person's life (Turpin & Iwama, 2011). One personal attribute that Sue Morrison has kept throughout most of her life is the desire to advocate for others who cannot do so for themselves. Rocks represent circumstances and conditions that pose problems to the flow of one's life (Turpin & Iwama, 2011). The lack of available jobs in Casper, WY after her graduation is an example of a rock that hindered the flow of Sue's life and caused it to change course as a result. The river walls and floor serve as the physical and social environment that surrounds the individual (Turpin & Iwama, 2011). Sue has taken part in many different environments throughout her professional career such as working within the school district, owning a private practice, and teaching for the University of North Dakota Occupational Therapy Program in Casper, Wyoming. Within these different environments, Sue has experienced many different social interactions whether it is with students, colleagues, families, or insurance companies. Lastly, the open spaces between the objects are where the river, or life, continues to flow despite the challenges encountered (Turpin & Iwama, 2011). In Sue's case, she believes that she is currently starting to find a better work/life balance, which has made her life flow more smoothly.

### **Description of Participant**

Sue Morrison first learned about the career of occupational therapy after meeting an occupational therapist who was working with her grandparents. Sue had been asked by her mother to help take care of her grandparents who had both been diagnosed with Alzheimer's disease (S. Morrison, personal communication, October 9, 2018). The occupational therapist assisted Sue's grandparents in safety and ADL training in the home, while providing Sue with valuable information about the career. Sue mentioned that the occupational therapist made a huge difference in her families lives as well as her own and made her interested in the career of occupational therapy (S. Morrison, personal communication, October 9, 2018). Being attached to her home in Casper, WY and not wanting to move, Sue did not immediately pursue her interest in the career as she was unaware of any nearby programs. A year later, Sue became aware of the occupational therapy program that was offered at Casper College through the University of North Dakota and immediately applied to attend. Sue began her career in occupational therapy after graduating with her bachelor's degree from the University of North Dakota at the satellite campus in Casper, Wyoming in 1998 (S. Morrison, personal communication, October 9, 2018).

She first began working in the public-school system in Cody, Wyoming after her graduation due to a lack of positions available in her hometown of Casper, Wyoming. Sue felt the lack of occupational therapist positions available was due to the BBA, which had just been passed the year before her graduation (S. Morrison, personal communication, October 9, 2018). She then transitioned into the role of an educator and taught from 2000-2002 as an adjunct professor for the Casper College Occupational Therapy Assistant Program. Sue then went on to receive her Master of Science in occupational therapy through a hybrid program from San Jose State. She was required to attend classes on location for two weeks each semester and completed the remainder online. The program was developed for occupational therapists who were

interested in being an educator (S. Morrison, personal communication, October 9, 2018). Sue was able to complete her master's degree in 2004. She was able to teach biology as an adjunct professor from 2005-2010 at Northwest Community College in Powell, Wyoming; While simultaneously working at her private practice which focused on pediatrics from 2006-2010. Sue then returned to Casper College to act as the Occupational Therapy Assistant Program Coordinator from 2010-2012. In 2012, Sue transitioned into acting as the professional site coordinator and an assistant professor for the University of North Dakota Occupational Therapy Program at the Casper, Wyoming site (S. Morrison, personal communication, October 9, 2018). During her time as a professor for the University of North Dakota, she started the Student Organization for Accessibility and Resources (SOAR) program at the Casper location. The SOAR program was designed to assist students attending Casper College with disabilities in learning more about the campus as well as the resources available to them. The program also focused on teaching the participants to advocate for themselves. Sue left her position as a professor in 2017 and returned to practice as a school-based pediatric therapist in Rawlins, Wyoming (S. Morrison, personal communication, October 9, 2018).

### **Methodology**

This study used the qualitative approach of a life history. This approach allowed the researchers to examine the evolution of the occupational therapy profession from the perspective of individuals in the field. Participants were assigned to students by the project directors from a compiled list of individuals obtained through purposive sampling methods. Informed consent was obtained by the project directors prior to conducting the interview. No gatekeeper issues were experienced, as the project directors contacted the participants directly. The semi-structured interview was guided by an interview schedule prepared by the project directors; the questions



on the interview schedule were designed to be used with all the individuals interviewed as part of the larger project. The researchers were allowed to modify or add interview questions as needed for each specific interview. The data was collected from a one-hour interview with Sue Morrison through Zoom, an online video-chat program that allowed the researchers to record the session. Before the interview was conducted, Sue provided the researchers with her curriculum vitae which cataloged her career as an occupational therapist, her role as an instructor, and the certifications she has obtained.

After the completion of the one-hour interview, the researchers spent approximately 7 hours transcribing the conversation verbatim. The researchers were able to download an audio file of the interview to refer to during the transcription process. Additionally, the researchers conducted a literature review on specific topics that Sue had referenced; PubMed, CINAHL Complete, and Google Scholar were the search engines used to find information on those topics.

To establish trustworthiness the researchers used reflexive journaling, debriefed with each other and fellow students as well as the project directors regarding the data findings. Two researchers coded the data thus increasing the reliability of both the transcription and coding processes. The researchers were able to use these qualitative study techniques to achieve more objective results which reflected the authentic experiences of Sue Morrison. Additionally, the researchers performed memoing on the transcript and used member checking to validate ideas and concepts. Project directors were also used to review the data throughout.

### **Data Analysis**

The interview was audio-recorded using the video chat program Zoom. The interview was transcribed and divided into 17 codes. The codes were formed through the process of memoing and reviewing the transcript. The codes were reviewed and assessed to confirm that

they were an accurate representation of what was said by Sue. If the codes did not show up multiple times within the coding process, they were reevaluated to see if they fit within any of the other codes that were chosen. From the codes, multiple categories and themes were formed.

The three categories that emerged from the codes were those of education, job/work, and advocacy. These categories were formed through the use of reflexive journaling and transcription while collaborating between the two researchers. Categories were further analyzed in order to create themes that represented each of these concepts. Six themes were created, two per category, to provide a representation of how these codes and categories reflected Sue and her career as an occupational therapist so far. The project directors provided frequent feedback and consultation throughout the data analysis process. To further explore the codes, categories, and themes see Appendix A.

The Kawa Model was used to help guide the data analysis process to examine Sue Morrison's life history from the point she learned about the profession to her current status as a practitioner. This was done in a chronological order. This model also aided the researchers in identifying barriers Sue has experienced throughout her career as an occupational therapist.

### **Findings**

Throughout the process of data analysis, the following categories and themes emerged: Education, Job/Work and Advocacy. Two themes were formed for each category based upon key concepts that were identified through the coding process of the interview.

#### **Education themes:**

**Sue greatly values the educational experiences she has had, both in and out of school.** Sue noted the importance of pursuing more education by stating "more education just isn't about more money. It's about more knowledge" (S. Morrison, personal communication,

October 9, 2018). She also states that it is not just what you learn from school, but the knowledge one gains in the field from practice as well as from other professionals. She believes that one needs to be humble when it comes to what they know and not think they are an expert. This may cause them to be a mediocre therapist because one needs to hold the notion that, “they do not know everything and need to strive to learn more” (S. Morrison, personal communication, October 9, 2018).

**Education has improved her occupational therapy practice.** Sue has found that her educational experiences as both a student and a teacher have been beneficial in increasing the efficacy of her occupational therapy practice. Throughout her educational experiences she has found a new love for theory, specifically the Person-Environment-Occupation Model, which she believes has made her interventions more client-centered. She also tries to attend continuing education courses that are relevant to a rural community as she wants to keep as up to date as possible:

"I believe in the power of education...of knowing how things work, knowing how the systems work, knowing where to go, knowing what you don't know..."

**Job/Work Themes:**

**Sue feels that an occupational therapist needs to be a "jack of all trades" when working in a rural setting.** Sue identifies that being an occupational therapist in a rural setting requires one to be a generalist, as they will experience a wide variety of diagnoses and conditions. She identifies that since she feels there is a need to be a generalist, she does not actively seek out specializations as she used to:

I think that part of why we don't have better membership for the Wyoming OT association is because we're rural, because you have to be a jack of all trades. You're not going to go to conference where it's two days on one particular topic.

**Sue's goal is to be a great therapist by "keeping up with the times and through evidence-based practice."** Being able to continually learn about new evidence-based treatments and interventions has allowed Sue to become a more efficacious practitioner:

"I had to really dig back into research which I learned to love and evidence-based considerations. And I did it so that I would be a good educator and a good role model. I had no idea how it was going to impact me when I went back into practice."

#### **Advocacy Themes:**

**Sue believes there is a need to advocate for yourself to create a healthy work-life balance.** Creating a work-life balance for Sue has been a challenge throughout the course of her practice. This is an area she believes she has finally been able spend more time one, as she is starting to have more time for herself after stepping down from teaching:

People who go into the profession of OT, most of them are workaholics. That is the biggest challenge, and when I first started working, I wanted to work everything, do everything, see everything, be everything. I never took a summer off. I always worked full time in the summers and um, that's been the biggest challenge. So, when I had the opportunity to take this past summer off, I took it off, it was the first time in my entire career, and I'm going to do it again. It was heavenly, but it's really finding that balance because we are nurturing people. That's what I would go into this profession, and it's hard for us to say no when we can help. So, we're always taking on. I really don't know an OT

that hasn't gotten into that pit where you're just working, working, working, working, working. So, finding that balance, that's the most challenging.

She enjoys using this new-found freedom to spend time camping with her family and to write and play music.

**Sue is passionate about engaging with others to help them maximize their potential.**

Sue is a passionate occupational therapist who desires to advocate for individuals who may be unable to for themselves. Sue identifies that advocacy is a part of her philosophical values which is one factor as to why she pursued occupational therapy. Her passion for advocacy still lives on at the University of North Dakota Occupational Therapy Program, Casper site through the SOAR program she helped to create. She stated that the program partially came about due to her experience with a relative who was diagnosed with autism. She saw the opportunity for occupational therapy students to provide assistance to individuals with disabilities attending Casper College.

**Assertion:**

Sue is a strong proponent of education, she is committed to being a generalist and having the knowledge and evidence to advocate for herself and the others to engage in meaningful occupations and create a healthy balance in their lives.

**Discussion/Conclusion**

Sue started practicing as an occupational therapist in 1998 and has been a strong proponent for education ever since. She is committed to being a generalist and having the knowledge and evidence to advocate for herself and others to engage in meaningful occupations and create a healthy balance in their lives. As Sue primarily practices in school-based pediatrics, her service provision was greatly influenced by IDEA, and being able to help all children achieve

their full potential. IDEA was originally passed in 1975 with the purpose of providing free appropriate education for children with disabilities (Individuals with Disabilities Education Act, 2004).

In particular, Sue felt that BBA of 1997 significantly affected her ability to find a job as an occupational therapist in specific locations after her graduation in 1998. She found that it was difficult to find a job as an occupational therapist in Casper, Wyoming for both herself and her classmates as a result of changes in reimbursement that were occurring regarding skilled services (Komisar, 1997). This resulted in Sue having to leave her family home of Casper, Wyoming to find a job and eventually ended up in Cody, Wyoming in the school district. Sue stated this ended up being "a blessing in disguise," as she loved every minute that she spent in Cody, Wyoming despite her initial reservations (S. Morrison, personal communication, October 9, 2018).

Sue's commitment to the profession of occupational therapy is evidenced by her tireless work as an advocate for those who are unable to do so for themselves, such as children and individuals with disabilities. Sue mentioned that her best memory as an occupational therapist occurred when a child with autism she had been working with finally made a breakthrough and said her name during a chance encounter in town, two years after she had moved away and stopped working with him (S. Morrison, personal communication, October 9, 2018). She also frequently performs self-composed music at charity functions such as the American Cancer Society, as well as suicide prevention and autism awareness events. This allows Sue to maintain a good work-life balance and prevent herself from burning out. She feels there is a need to advocate for oneself in order to maintain a healthy mental state and be able to handle the daily stressors that occur during work.

In order to pursue her goal of being an educator in the occupational therapy field, Sue had to return to school in order to obtain her master's degree from San Jose State as a result of the degree requirement changes that went into effect in 1999. Through teaching occupational therapy in a higher education setting, Sue has been able to discover a new love for theory and evidence-based practice. She feels that there is a great need to incorporate evidence-based research into practice to be able to provide the best care possible (S. Morrison, personal communication, October 9, 2018). Sue found that in order to be a good teacher, she needed to make sure she knew what she was teaching, as it was difficult to "get anything past a student" (S. Morrison, personal communication, October 9, 2018). After returning to practice, Sue found that she was more aware of the need for evidence-based research and had an increased ability to locate and understand the information she needed to improve treatments.

Sue Morrison's life history revealed her desire to advocate for herself and others to engage in meaningful occupations and create a healthy balance in their lives. She uses evidence-based research in her practice to stay current and provide the best treatment possible, which she feels she learned during her time as an educator for the University of North Dakota Occupational Therapy Program in Casper, Wyoming. Her life history adds to the profession of occupational therapy's knowledge by providing an example of a hardworking, and inspiring person that future therapists can look up to. It is essential for future therapists to understand how the profession and its practitioners evolve over time.

### Appendix

#### Visual Data Display - Life History of Sue Morrison, MSOT, OTR/L

Ashton Hudspeth, MOTS & Colton Peltier, MOTS

<b>Categories</b>	Education	Job/Work	Advocacy
<b>Codes</b>	Personal Education Teaching Experiences Continuing Education Doctorate Viewpoints FOR	Job Research Memberships Rural Inspiration Challenges	Advocacy Work/Life Balance Music Volunteering Peds
<b>Themes</b>	-Sue greatly values the educational experiences she has had, both in and out of school -Education has improved her occupational therapy practice	-An occupational therapist needs to be a “jack of all trades” when working in a rural setting -Sue's goal is to be a great therapist by "keeping up with the times and through evidence-based practice."	-Sue believes there is a need to advocate for yourself to create a healthy work-life balance -Sue is passionate about engaging with others to help them maximize their potential

**Assertion:** Sue is a strong proponent of education, she is committed to being a generalist and having the knowledge and evidence to advocate for herself and the others to engage in meaningful occupations and create a healthy balance in their lives.



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