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Evolution of Occupational Therapy Practice: Life History of Karen Jacobs, EdD, OTR/L, CPE,

FAOTA

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Abstract

The purpose of the study is 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. This is done through the life history stories of occupational therapists who have held leadership roles at the national level and beyond. The participant, Dr. Karen Jacobs, was selected from a participant list compiled through purposive sampling by the project directors. The data was gathered by a semi-structured interview with the use of an interview schedule created by the project directors. The data was analyzed through document review, a verbatim transcription of the interview, and coding of the data that was gathered. Through data analysis four categories emerged which included: career path, personal and professional growth, lifestyle, and impact of evolution of practice. From those categories themes emerged and then collapsed into a final assertion. The results of the study found that Dr. Jacobs provided insight on how occupational therapy has evolved throughout history and her career. Dr. Jacob's lifestyle, career path, evolution of practice, and her ability to grow personally and professionally have influenced her passion to make a difference and provide opportunities in occupational therapy

Introduction

This life history is one of 30 life history interviews which are part of a larger project, *Histories of Individuals Who Have Been Influential in Developing Occupational Therapy (OT) at the National Level and Beyond*. The purpose of study is 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 through the life history stories of occupational therapists who have held leadership roles at the national level and beyond. It is anticipated that the life history process will be a powerful way to gather this information. This was a qualitative study that used a life history approach. The participant was selected from a participant list compiled through purposive sampling by the project directors. No specific gatekeeper issues were established as initial contact was made by project directors. Informed consent was obtained prior to the interview and the project was reviewed by the UND Institutional Review Board and due to the study design the formal IRB process was waived. 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 student researchers were allowed to modify or add interview questions as needed for each specific interview. The data was gathered through a Zoom interview on the computer that lasted one hour. The setting that the interview took place was in the interviewer's home and the participant's home. The participant's Curriculum Vitae was provided before the interview and was used, as well as her blog and other published work in order to collect background information on the participant. The interview was audio recorded and then later transcribed.

Dr. Karen Jacobs is an accomplished occupational therapist, educator, and leader who has an extensive number of achievements in the field of OT. She has worked in areas such as ergonomics, the school system, and has been teaching at the collegiate level for over 30 years. Her achievements include writing books, chapters, articles, publishing children's books, giving presentations on a variety of topics, and continuously conducting research. Some of the notable employment positions that she has held include AOTA Vice President, AOTA President, clinical professor, Editor-in-Chief of *WORK: A Journal of Prevention, Assessment, & Rehabilitation*, and Associate Dean of digital learning and innovation of the College of Health and Rehabilitation Sciences at Boston University. She has had a great influence in the field of occupational therapy such as developing the School Backpack Awareness Day and being apart of many other state and national organizations. In addition to her extensive amount of experience in occupational therapy, she also involves herself in the community volunteering in order to give back to her community and society as a whole.

Timeline Literature Review

There were many different events that occurred in occupational therapy throughout the time that Dr. Karen Jacobs was in school to present time. This timeline was chosen due to the relevance that it held with Dr. Jacobs and the major events that she experienced with a focus on the early years that she was an occupational therapist. In 1979, the American Occupational Therapy Association (AOTA) created uniform terminology for occupational therapy and established research on the effectiveness of evidence-based practice (AOTA, 2017, p 1). This was later described by Karen as a big step for the profession of occupational therapy due to the limited terminology used throughout her schooling along with the growth of terminology throughout her career. In 1993, the AOTA standards of Ethics Commission published the “Core

Values of Occupational Therapy” (AOTA, 2017). The growth of AOTA creating and publishing work was expanding greatly and contributed to practicing occupational therapists at the time. In 1996, the American Occupational Therapy Certification Board (AOTCB) became the National Board for Certification in Occupational Therapy (NBCOT) (AOTA, 2017). This change was proven to be a large event in the history of occupational therapy due to future controversy that arose. In 1998, AOTA adopted the vision statement, “AOTA advances occupational therapy as the preeminent profession in promoting the health, productivity, and quality of life of individuals and society through the therapeutic application of occupation” (AOTA, 2017). During this time Karen Jacobs was the current AOTA president and was involved in a lot of the events and decisions that were made. In 1999, NBCOT and AOTA were in a legal dispute over NBCOT trademarking of OTR and COTA ends being the R and the A. This event was proven to be a major event as it affected future occupational therapists. Karen Jacobs being the AOTA President at the time was directly involved in this issue and stated that it was a major disappointment to her to lose that fight. Overall, these events were major during the early years that Karen Jacobs was an occupational therapist and eventually AOTA president.

Theory

The Kawa model was used to guide the research of the life history study. The Kawa model uses a metaphor of a river to represent life energy or life flow (Turpin & Iwama, 2011). This is relevant to the study due to the model evaluating the life history of an individual and the elements that represent different life circumstances (Turpin & Iwama, 2011). The model is shown through the study by creating a timeline of Dr. Jacob’s life with the interview schedule. The semi-structured interview considered the accomplishments and barriers that balance the life history of Dr. Karen Jacobs and created a timeline of her life. The use of the Kawa model is

evident with the questions and answers that were given throughout the interview and looked at the importance of content that shapes a person's life. Overall, the Kawa model was used to organize the contents represented by the river that showed the life flow of Dr. Karen Jacobs (Turpin & Iwama, 2011).

Description of the Participant

Introduction to Occupational Therapy

Dr. Karen Jacobs described having a late introduction to occupational therapy as evidence of the information gained from the interview. She was first introduced to the profession at a craft fair when she set up a stand for her leather crafts that she did as a hobby. Dr. Karen Jacobs stated that the booth was set up next to a woman who was studying out of an anatomy book and Dr. Jacobs asked her what she was studying in school. The woman told her that she was going to school for occupational therapy and described the profession to Dr. Jacobs. The woman then asked Dr. Jacobs to come with her to work on a cadaver that she was dissecting for class. Dr. Jacobs stated that she was very interested in occupational therapy because of that. She did some research about the profession and from that point on she decided that she wanted to go back to school and was determined to become an occupational therapist. Dr. Jacobs described that she became instant friends with the woman she met at the craft fair and they still keep in contact to this day which she is thankful for.

Educational Experiences

Dr. Jacobs earned her bachelor's in psychology at Washington University in St. Louis; as well as her master's in occupational therapy at Boston University. She had a class of about 20 students while receiving her master's degree and enjoyed the experiences that she had while in school. Dr. Jacobs did two Level II fieldwork placements, the first with veterans and the second

with cardiac rehab which both posed as an interest to her for her future as an occupational therapist.

Accomplishments and Involvement

Dr. Jacob's accomplishments were driven by her passion and dedication to the occupational therapy profession to help identify areas that needed more development and research. She stated, "We all need to make a commitment to advance the body of knowledge and to be an advocate for occupational therapy". Dr. Karen Jacobs set three goals for herself at the beginning of her schooling and one of those goals was to become the AOTA president. Dr. Jacobs achieved this through a mentorship and being involved with the organization prior to becoming the president. She stated, "I've learned so much from people along the way and I'm the kind of person that likes to be visionary and our profession and maybe the roles I've been in has allowed me to be visionary and try things". Dr. Jacobs also started the School Backpack Awareness day to prevent pain and injury that can occur from heavy backpacks and bags (AOTA, 2019). Dr. Jacobs collaborated with L.L. Bean for national backpack day creating one of the longest running national health initiatives in occupational therapy. Dr. Jacobs is also involved in presenting her research and insight at the national level through presentations, articles, and books.

Occupational Therapy Over Time

Dr. Jacobs has watched and experienced many changes in the OT profession. Some of these changes include the creation and expansion of the occupational therapy practice framework and evidence-based research and practice. One change that held a great impact was the trademarked R that NBCOT eventually won in a legal dispute involving AOTA. This was

disappointing to Dr. Jacobs as she was AOTA president at the time and was directly involved in this issue. Dr. Jacobs has contributed to the expanding research and encourages other therapists and students to add to the profession through the use of research as well.

Methodology

Study Design

This study was completed using a qualitative study design with a life history approach to gather the meaning and experiences of occupational therapists regarding the changes of occupational therapy practice throughout their careers this far. This approach allowed the focus to be on the participant's involvement in the evolution of occupational therapy practice. The semi-structured interview was guided by an interview schedule provided to the researchers by the project directors. The questions included in the interview schedule were designed to be used with each of the 30 individuals interviewed as a part of the larger project. The student researchers were allowed to modify or add interview questions as needed for their specific interviewee. The project was reviewed by the UND Institutional Review Board and because of the study design the formal IRB process was waived.

Participant selection

The project directors used a purposive sampling method to compile a list of influential people within the field of occupational therapy. The inclusion and exclusion criteria were all outlined by the project directors. The participant was selected from that participant list and was initially contacted by the project directors resulting in no specific gatekeeper issues. The participant was contacted through email in order for the interviewers to introduce themselves and thank the participant for her willingness to participate in the study as well as schedule a time to

complete the interview. The participant then committed over email to an hour long interview within the following month.

Data collection

Data was gathered through a one-hour semi-structured interview as well as document review. The participants Curriculum Vitae was provided before the interview and was used to collect background information before the interview was completed. The researchers also collected information about the participant from her blog and other published work. Informed consent was obtained prior to the interview. The interview was done over Zoom on the computer and lasted one hour. The interview took place at one of the researcher's apartments while the participant was in her home. The interview was audio recorded and then later transcribed verbatim by the researchers. The researchers spent a total of 30 hours gathering data.

Trustworthiness

The researchers used reflexive journals to document the process before, during and after the interview process. This allowed the researchers to look back at the information and confirm validity and reliability. In order to assure reliability and validity there were two researchers along with two project directors to help guide the life history study. The researchers also used member checking by sending the transcription to Karen Jacobs to confirm that the information was an accurate reflection of her history. Overall, the use of triangulation with reflexive journals, researchers, project directors, and member checking assured trustworthiness throughout the process.

Data Analysis

The researchers started the data analysis process by transcribing the interview verbatim. Each of the researchers read the transcription used memoing as another step in the data analysis

process. Together the researchers divided the data from the transcript into codes. When separating the information into codes, categories, and themes, the researchers used the Kawa Model as a guide. The researchers looked for major challenges and accomplishments throughout the participant's career as well as major events and obstacles in other aspects of her life (Teoh & Iwama, 2015) Through this process the researchers developed 25 codes. These codes were developed using specific words mentioned by Dr. Karen Jacobs during the interview. Once a code had been developed the researchers added quotes from the transcript that supported that same code or topic. No data from the interview was discarded as the researchers found all of the information pertinent to the life history and experiences of Dr. Karen Jacobs.

The researchers identified commonalities between the 25 codes which then collapsed into four categories that the researchers felt reflected all of the information that was gathered from the participant. Based on these four categories the codes were placed into one of them following a discussion between the researchers regarding the category of best fit for each code. The four categories that emerged included career path, personal and professional growth, lifestyle, and impact of evolution of practice. From the four categories that were developed the researchers generated 11 themes that captured the essence of the categories. As a final step in the data analysis process the researchers used the codes, categories, and themes developed in order to create a final assertion statement. The assertion statement summarizes all the data the researchers gathered from Dr. Karen Jacobs responses during the interview (see appendix).

Findings/Results

The Kawa model was used to guide the data analysis by determining common codes that represent the elements in the river that is used by the model. After the codes emerged the researchers were able to conclude which categories could represent the common codes or

elements that related to the timeline of Dr. Jacob's life history. Each of the categories are supported by themes that include quotes as evidence.

Career Path

Multiple codes arose that related to a common category of Dr. Jacob's career path. With the category of career path, the researchers concluded that there were two themes that related most to the codes in that category. The first theme that emerged from the category of career path was: Dr. Jacobs believes that lifelong learning and education are necessary for improvement in any health care profession.

“I think interprofessional education is critical and it is so important as we're seeing our changing healthcare system being valued best.”

“As healthcare teams we need to make sure that we know how to explain artistic values and work together on healthcare teams.”

The second theme that arose from the category of career path was: Karen understands that to be an effective occupational therapist and provide clients with the best care she needs to develop strong partnerships with others.

“I think it is really wonderful to be able to work with people in this type of organization that includes everybody.”

“As a profession I see us looking to collaborate more and making sure that we use knowledge translation to take maybe some of the complicated research we are doing and putting it forth so people understand it.”

The last theme that emerged from the category of career path was: a fundamental belief of Dr. Jacobs is that knowledge is power and occupational therapy needs inspiring leaders to enhance the field and provide future opportunities.

“Look at opportunities that you can help to just have even one more person know what occupational therapy is, you know, share your narratives and listen to your clients and be client-centered and evidence-based.”

“So, making sure legislators know how important occupational therapy is, making sure we’re around the table when there’s discussions, and making sure that we’re written into any legislation as well.”

Personal and Professional Growth

For the category of personal and professional growth the researchers saw it fitting to create themes that represented Dr. Jacob’s experiences personally and professionally. The researchers came up with multiple codes that represented the growth that Dr. Jacobs experienced throughout her career and life. The first theme created was: Dr. Jacobs is convinced that exposure to opportunities plays a role and influences individuals passions, goals, and their skill development.

“National School Backpack Awareness Day is the largest running Public Health Initiative in occupational therapy, globally, ever. I’m very proud of that and that all started with you know, my two, two of my younger kids having heavy backpacks and I took that as an issue and said we have got to do something and I did it.”

“I always feel that I learn more from my mistakes, the lessons learned then when I’m successful.”

The second theme that arose from the category of personal and professional growth was: Karen Jacobs is ambitious in advocating, researching, and setting goals for herself by sharing information about occupational therapy.

“I decided that one of my passions is promoting occupational therapy and so I did a participatory action research project in preparation for my Slagle lecture.”

“It’s incredible self-actualization you work hard and you make a difference in the world because every single person that you touch can be changed from that interaction.”

The last theme for the category of personal and professional growth was: Karen has confidence in continuously improving yourself and working towards goals even after hardships is the only way to learn, grow, and achieve.

“My name got out there not just the work I did at AOTA, but from writing, and presenting, volunteering, of course, then I decided to run for vice president.”

If Karen was AOTA president now “I would have much more knowledge and skills for conflict resolution and negotiation skills. That’s really evolved over time. I don’t think I was the best negotiator before.”

Lifestyle

The category lifestyle was created by the researchers due to the importance and value that Dr. Jacobs holds for her family, hobbies, environment, and community involvement in her life. The first theme that emerged for this category was: Karen’s family and relationship dynamics impacted the decisions she made in her life.

“So, my family has really helped me, my mom and dad were great, great supporters until they passed away and they used to come to the AOTA conference with me every year.”

“So, 15 years ago, I made a life decision. I had remarried and then, got divorced again and had two more children in the second marriage and when my youngest child went off to BU I decided to become a faculty residence.”

The second theme that arose from the category of lifestyle was: Dr. Jacobs understands that completely immersing into an environment or culture impacts her decision making and the relationships that she builds.

“So, I live in a dorm at BU so I am surrounded by students right now. I’m looking out at a beautiful view of Boston. I’m on the 23rd floor and I interact with students on an absolute daily basis.”

“Boston is a city that has enormous opportunities and I think resource-rich... So, I think that’s, you know, being able to be mobile makes a big difference in where I can work and things that I can do, the culture.”

The last theme that emerged from the category of lifestyle was: giving back to the community is important to Karen Jacobs, it has helped her to develop strong relationships and has created many opportunities.

“So, all of that has influenced what I do and it’s not only giving back to society, it’s mentoring people, it’s teaching, doing volunteering, teaching.”

“Well one of the things that was very important to me when I was a student and when I graduated was to give back to society...I give back as a volunteer on a regular basis.”

Impact of Evolution of Practice

The category of impact of evolution of practice was created because it had a large affect during the early start of Dr. Jacob's career leading up to where she is at currently. There were many changes that were made to the profession of occupational therapy and Dr. Jacobs had the privilege to see those changes through. The codes that were created matched the category of the impact of evolution of practice. The first theme that emerged from the category was: Dr. Jacobs is certain that being involved at state and national levels can provide opportunities and influence an individual's career choices.

“You start at a local level and then you know, you keep your ears and eyes open to opportunities that you learn about.”

“I think it would have been more fun to be AOTA president now because there's so many opportunities that are before us and we have never had this large number of members at AOTA and this larger cadre of people in the profession and this global connection.”

The last theme that arose from the category of impact of evolution of practice was: Karen Jacobs accepts that changes in policies, organizations, and the world will impact professionals and influence their lives in different aspects.

“How important evidence literature is to guide you and how important every single one of us needs to be an ambassador for occupational therapy and to make a commitment to advance the body of knowledge.”

“I started with no or little evidence in supporting what we do, to evidence being that evidence-based practice is extremely important.”

Overall, the evidence found between the four categories summarizes multiple events and experiences that have helped shape the life history of Dr. Karen Jacobs. Dr. Jacob's lifestyle, career path, evolution of practice, and her ability to grow personally and professionally have influenced her passion to make a difference and provide opportunities in occupational therapy.

Discussion/Conclusion

During Dr. Karen Jacobs' start in the occupational therapy profession in 1979, AOTA had started to create more terminology for the profession. This was just the beginning of major growth for the profession of occupational therapy and with Dr. Jacobs as a new therapist (AOTA, 2017). During the time that Karen Jacobs was AOTA president in 1998, she was a part of many changes that were occurring including the NBCOT trademark of the R in 1999 (AOTA, 2017). Dr. Jacobs stated that AOTA and NBCOT went into a legal dispute over the R and in the end AOTA lost the fight. Dr. Jacobs described, "we had a civil war between people who were friends with each other". Dr. Jacobs described events that happened during the time that she was president and that it involved a lot of negotiating.

The data analysis showed that there were multiple major events that had barriers but also opportunity that occurred through Dr. Jacob's lifetime. Throughout the process of the study and piecing together the life history of Dr. Karen Jacobs the Kawa model was used as a guide and can be seen in the data. The researchers looked at life circumstances, challenges, accomplishments, and major events that happened throughout Dr. Jacob's life history and how those things affected the flow of her decisions and her life. For example, Dr. Jacobs had to make decisions on what was best for her family at the time that she was a student and a practicing OT. Dr. Jacob's has lived through major changes that have occurred in the OT profession, which also influenced her decisions. The information gained from the research study provided information

on how Dr. Karen Jacobs saw occupational therapy evolving from its inception to the current profession today. This was proven by the categories, themes, and evidence provided by the data analysis of the information gained from the interview. In conclusion, Dr. Karen Jacobs contributed to the knowledge of past, current, and future occupational therapists.

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Appendix

**Life History: Karen Jacobs, EdD, OTR/L, CPE, FAOTA
Katelyn Jennings, MOTS & Abby Wendel, MOTS**

Category: Career Path	Category: Personal and Professional Growth	Category: Lifestyle	Category: Impact of Evolution of Practice
Codes: collaboration, leadership, clients, employers, student, occupational therapy, professional opinion	Codes: goals, advocating, conflict resolution, research, passion, challenges, accomplishments	Codes: hobbies, family, housing, community, relationships, volunteering	Codes: advancements, policy change, world events, model/theory, organizations
Theme: Karen Jacobs believes that lifelong learning and education are necessary for improvement in any health care profession.	Theme: Dr. Jacobs is convinced that exposure to opportunities plays a role and influences individuals passions, goals, and their skill development.	Theme: Karen’s family and relationship dynamics impacted the decisions she made in her life.	Theme: Dr. Jacobs is certain that being involved at state and national levels can provide opportunities and influence an individual's career choices.
Theme: Karen understands that to be an effective occupational therapist and provide clients with the best care she needs to develop strong partnerships with others.	Theme: Karen Jacobs is ambitious in advocating, researching, and setting goals for herself by sharing information about occupational therapy.	Theme: Dr. Jacobs understands that completely immersing into an environment or culture impacts her decision making and the relationships that she builds.	Theme: Karen Jacobs accepts that changes in policies, organizations, and the world will impact professionals and influence their lives in different aspects.
Theme: A fundamental belief of Dr. Jacobs is that knowledge is power and occupational therapy needs inspiring leaders to enhance the field and provide future opportunities.	Theme: Karen has confidence in continuously improving yourself and working towards goals even after hardships is the only way to learn, grow, and achieve.	Theme: Giving back to the community is important to Karen Jacobs, it has helped her to develop strong relationships and has created many opportunities.	
Assertion Statement: Dr. Jacob’s lifestyle, career path, evolution of practice, and her ability to grow personally and professionally have influenced her passion to make a difference and provide opportunities in occupational therapy.			