Entry-Level Occupational Therapy Student Perceptions of Occupational Balance in Graduate School: A Qualitative Study

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Abstract

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Keywords

Occupational balance, graduate school, occupational therapy student

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Entry-Level Occupational Therapy Student Perceptions
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ABSTRACT

The objective of this study was to explore occupational therapy (OT) students' occupational balance and to examine how OT students' experiences in a graduate program promoted or inhibited occupational balance. Grounded theory methodology was used to develop a theory of the occupational balance of entry-level OT students. Twenty-six students were recruited using convenience and maximum variation sampling. Data analysis through constant comparison of transcripts, field notes, and memos consisted of open, axial, process, and selective coding. A storyline narrative with diagrams displayed relationships among concepts and supporting evidence for inductively derived theoretical propositional statements. Students in OT programs progressed through three phases of occupational balance during graduate school. The presented Theory of Occupational Balance indicated students developed a meaning of occupational balance based on past experiences and personal values. Occupational balance is influenced by different contexts and situations. This study revealed several strategies OT students implemented, including adapting methods to effectively and efficiently learn, using support systems, participating in multiple occupational roles, making time for self-care, and knowing when to seek professional assistance. This article presented a new Theory of Occupational Balance for OT Students. Results can inform administrators and faculty about the implications of curriculum design for the occupational balance of OT students. Understanding student occupational balance and circumstances that can cause disruptions may help prevent disruptions from creating unmanageable stress. Understanding strategies students can implement to return to occupational balance may help faculty suggest options for students who cannot self-manage an occupational balance disruption.

Background/Literature Review

The transition from undergraduate to graduate school presents new challenges for students pursuing careers in the health professions (Govender et al., 2015). These challenges require exploration and integration of coping strategies while developing profession-specific practice skills (Govender et al., 2015). Entry-level graduate programs typically are year-round and require completion of up to 15 credit hours a semester in addition to mandatory fieldwork or clinical experiences ("How Much Time Per Week," 2017). Multiple studies included reports from students about heightened stress levels while earning a graduate degree as the result of time spent in academic-related activities combined with ongoing personal and financial obligations (Grab et al., 2021; Myers et al., 2012; Sirgy & Lee, 2018). The documented increase in occupational therapy (OT) student stress (Govender et al., 2015; Laposha & Smallfield, 2022) may in turn decrease their occupational balance (Henton et al., 2021).

Wilcock et al. (1997) introduced the term occupational balance and described the association between occupational balance and health. Wagman and colleagues (2012) completed a concept analysis of occupational balance that resulted in a definition of occupational balance being "the individual's subjective experience of having the 'right mix' (amount and variation of occupations in his/her occupational pattern)" (p. 325). The authors went on to explain that occupational balance is instrumental to mental and physical health and feelings of well-being and life satisfaction (Wagman et al., 2012). In contrast, authors stated occupational imbalance causes fatigue, feelings of stress, and negative thought patterns (Christiansen, 2007; Yazdani et al., 2018). Occupational therapists typically refer to occupational balance as a healthy mix of activities in the self-care, work, and leisure categories of occupation (American Occupational Therapy Association, 2020).

Breen-Franklin and Atler (2022) completed a study that investigated entry-level OT student awareness of the connection between occupation, self, and the profession of OT. Breen-Franklin and Atler (2022) reported the results of their study showed improved student awareness of their preferred occupations and connections between occupation and other areas of life. In a mixed-methods study, Henton and colleagues (2021) investigated the effect of entry-level OT student stress levels, mindfulness, and occupational engagement on their perceived occupational balance. Students in the study indicated that occupational engagement had a positive impact on life by improving occupational balance and occupational disengagement could contribute to occupational imbalance (p. 13). No strategies to assist students in avoiding an occupational imbalance or regaining occupational balance were discussed as part of this study (Henton et al., 2021).

Malek-Ismail and Krajnik (2018) examined entry-level OT student occupational balance but did not identify any strategies for avoiding or managing a disruption. Grab and colleagues (2021) discovered 48% of OT students reported their "occupational involvement was not very balanced" (p. 11) and most students interviewed reported they did not feel their lives were balanced; however, the study did not specifically discuss occupational balance. Professors in the same study indicated feeling students'

life balance decreased when stress increased (Grab et al., 2021). The researchers included student employed coping strategies for stress but did not relate the strategies back to improving life balance (Grab et al., 2021). Results of multiple studies from the profession of OT included strategies students employ to manage stress, but researchers did not discern the effect of these strategies on the achievement of occupational balance (Govender et al., 2015; Laposha & Smallfield, 2022; Lewis-Kipkulei et al., 2021; McCombie et al., 2016).

Problem Statement
Graduate students may experience a lack of occupational balance in daily activities due to high academic demands in entry-level professional programs (Porath & Rosenblum, 2019). Students often reported spending more time in educational activities than in self-care, work, or leisure pursuits (Porath & Rosenblum, 2019). Researchers discovered that entry-level OT graduate students (referred to as OT students from this point forward) struggled with balancing academics, family life, and employment (Grab et al., 2021; Henton et al., 2021). Malek-Ismail and Krajnik (2018) found that when OT students took time for leisure activities or socialization, they perceived feelings of guilt and reported fear of falling behind.

A dearth of research exists about the occupational balance of OT students. Within OT literature, the terms occupational balance and life balance have been used interchangeably (Malek-Ismail & Krajnik, 2018; Matuska & Christiansen, 2008), which is consistent with current trends in literature outside of the OT profession as well (Enns et al., 2018; Myers et al., 2012; Rummell, 2015). Given this lack of distinction between occupational balance and life balance, there are currently no specific theories that address or explain phenomena related to occupational balance. Similarly, a specific gap that the present authors noted is that currently there are no theories of occupational balance that apply to OT students throughout their professional program. A theory to explain the occupational balance of OT students may assist students and faculty in preventing a balance disruption and returning to occupational balance following a disruption. Providing OT students with tools to manage occupational balance disruptions may contribute to their mental health and prevention of burnout as students and future practitioners.

Current Model of Occupational Balance
Jonsson and Persson (2006) developed "a tentative model of occupational balance" (p. 69) using flow theory. The authors used secondary data analysis from four previous studies of individuals of varying ages and diagnoses within the United States (US), Italy, and Sweden to develop the model. Because of the variability in the sample, the authors did not identify a specific population who could benefit from the model. The authors described three dimensions that relate to each other within the context of everyday occupations: exacting, flowing, and calming experiences and hypothesized that if one of the three dimensions is too consuming, it may create an imbalance that could negatively impact the health of the person. They did not provide any strategies for improving occupational balance if an imbalance arises or any suggestions that could be applied to teaching and mentoring OT students.

The researchers conducted the present study to explore OT students' occupational balance and to examine how OT students' experiences in a graduate program promoted or inhibited occupational balance. A theory of occupational balance was inductively derived to explain how some students find occupational balance, even under challenging circumstances, but others experience difficulty achieving occupational balance when encountering similar challenges. Lastly, this study addressed a gap in knowledge about strategies students in OT programs use to achieve occupational balance. Developing a theory specific to OT student occupational balance can help identify potential disruptions before they occur, equip OT students with methods to return to occupational balance following a disruption, improve academic success and retention, minimize mental health disturbances, and prepare students for maintaining occupational balance to avoid burnout once assimilated into the profession. Identifying methods to achieve occupational balance may equip OT students with the ability to continue using the strategies as entry-level practitioners and decrease the chance of burnout as an OT.

Method

Study Design

The researchers of this study used a grounded theory approach to address the lack of evidence regarding how OT students define and achieve occupational balance amid challenges encountered in graduate school. According to Corbin and Strauss (2015), information obtained through a grounded theory study can describe experiences that can help people develop a deeper understanding of a situation and effective methods to respond to it. Grounded theory is a methodology researchers employ to examine a problem from a new viewpoint and to understand how different people approach a similar circumstance in different ways (Corbin & Strauss, 2015).

The researchers did not find a theory in the literature to explain how some OT students find occupational balance but others experience difficulty, even when encountering similar circumstances. Given the utility of the grounded theory approach in providing a theoretical explanation of everyday phenomena (Corbin & Strauss, 2015), it was an appropriate methodology for studying occupational balance in OT students. Students were sampled from various types of entry-level programs and at different points in their education purposefully, to ascertain what happens to OT student occupational balance as progression occurs through the curriculum. Before initiating the study procedures, the researchers obtained Institutional Review Board (IRB) approval from the two universities affiliated with the researchers.

Participants

The researchers sampled participants in two phases. The researchers recruited participants through purposeful sampling to obtain a preliminary sample of OT students (Creswell & Poth, 2018). The initial sample was one of convenience and included students in their second year of the full-time Master of Occupational Therapy (MOT) program at one of the researcher's institutions.

Since the goal of grounded theory research is to gain information about developing concepts, once initial categories of data were developed, the researchers purposefully sought a more heterogeneous sample, using maximum variation sampling (Corbin & Strauss, 2015). Participants were sought who could "demonstrate different properties of concepts and show variation" (Corbin & Strauss, 2015, p. 135). The goal of sampling is to ensure participants are representative of the developing concepts (Corbin & Strauss, 2015), therefore maximum variation sampling consisted of OT students from other universities in any year of study in their program. The researchers recruited students from entry-level master and doctoral OT programs for the second sampling because the curriculum for both is demanding and contains much of the same content (Accreditation Council for Occupational Therapy Education [ACOTE], 2022). Both degrees also graduate students who will take the same certification exam and become OTs. The researchers secured additional participants until no new concepts resulted from data analysis, and no established categories could be further developed (Corbin & Strauss, 2015).

The researchers included only English-speaking participants currently enrolled full time in OT programs at various points in their academic journey. Sampling included OT students from universities in the Midwest. The researchers initially recruited participants for this study via an email sent to students in the second year of the MOT program. SurveyMonkey® (https://www.surveymonkey.com) was utilized for informed consent. For the second phase of sampling, the researchers reached out to other program directors asking them to forward the request for participation to their OT students. The same informed consent process was followed.

Data Collection
Data collection was completed in the fall of 2020 with students already enrolled in their respective OT programs when in-person class formats changed to remote due to the COVID-19 pandemic. The primary researcher collected data through one-on-one videoconference interviews with each participant. The researcher recorded video interviews through Zoom© computer software that encrypted recordings with password protection (Zoom© Security Guide, 2019). The researcher incorporated a guide to facilitate the initial participant interview (Creswell & Poth, 2018); however, the initial interview was unstructured, using open-ended questions to provide participants an opportunity to speak openly about their experiences. Interviews continued until conceptual saturation was achieved (Corbin & Strauss, 2015), interviewing each participant at least once.

Through theoretical sampling (Corbin & Strauss, 2015), the researchers identified five participants from the convenience sample for additional interviews and four agreed to participate. Participants who expressed views that varied from other participants were chosen for additional interviews to add variation to the data, gather information about repeated patterns in the data. and expand categories that appeared crucial to the developing theory (Corbin & Strauss, 2015). Interviews were conducted through Zoom© computer software and the same recording and transcription methods were used as with the initial interviews. The researcher did not utilize an interview guide for the

additional interviews; rather, used open-ended questions required to obtain theoretical saturation (Corbin & Strauss, 2015). Questions were derived from ongoing analysis of the data. The researcher documented in a reflective journal throughout data collection and data analysis. The journal included thoughts used to guide further interview questions and served as an audit trail to document the process of decision-making throughout data analysis (Creswell & Poth, 2018).

Data Management and Analysis
The researchers of this study included a Doctor of Health Science graduate student with a background as an OT, a qualitative methods expert, a grounded theory expert, and an OT academic content expert. The primary researcher uploaded audio recordings from Zoom© to the researcher's password-protected computer following each interview. The researcher used multiple features of Zoom© to ensure information security, including encryption requiring a session key so only the researcher could access the audio files (Zoom© Security Guide, 2019). The primary researcher transcribed all interviews from the Zoom© audio files within one week of conducting the interviews to create a verbatim transcription and assigned each participant a code to de-identify the transcript (Creswell & Poth, 2018). The primary researcher deleted Zoom© recordings per IRB protocols.

The primary researcher reviewed each transcript within a week and sent a copy through e-mail to each respective participant to review for accuracy. After verifying each transcript, the primary researcher completed open coding defined by Scott and Medaugh (2017) as describing the data by examining it to identify initial concepts using codes. The researchers organized common codes together to shape the initial categories of data. After the researchers established preliminary categories, they used theoretical data sampling to identify the five participants for subsequent interviews, four of which agreed to participate (Corbin & Strauss, 2015; Volstedt & Rezat, 2019). Only the primary researcher had access to participant identifying information.

The researchers used the axial coding paradigm of Corbin and Strauss (2015), which involved additional constant comparative analysis, comparing data among transcripts to identify conceptual similarities. Data identified as similar in open coding was regrouped into more conceptual categories during axial coding (Scott & Medaugh, 2017). In axial coding, the researchers also discovered additional information being identified about the concepts and added evidence to support the groupings, resulting in a deeper understanding of occupational balance (Corbin & Strauss, 2015; Scott & Medaugh, 2017). By organizing similar codes, connections became evident, and the researchers discovered new associations essential for theory development (Scott & Medaugh, 2017; Volstedt & Rezat, 2019). During axial coding, conditional and consequential traits of contexts used to manage occupational balance were identified as well as the outcomes of the actions taken by participants (Scott & Medaugh, 2017).

A storyline developed based on the evolving categories using definitional and propositional statements (Birks et al., 2009). Storyline is a strategy used in grounded theory research to explain the core category and assist in theory development (Birks et al., 2009). Definitional statements explained the categories of data, and propositional

statements explained relationships among categories and the storyline as it evolved (Birks et al., 2009). The propositional statements served as an outline of the storyline and were verified through constant comparison to the data (Birks et al., 2009). The researchers continued to return to the storyline as more data was collected to ensure the evidence from the data supported the propositional statements and concepts within the storyline to further develop the theory.

The storyline was adjusted accordingly when data were not supportive. The categories originally developed and analyzed were revised during the selective coding process to shape the evolving theory. The researchers noted outliers in the data that the emerging theory had not addressed and expanded categories to integrate them into the emerging theory, thereby improving the validity of the theory (Corbin & Strauss, 2015; Volstedt & Rezat, 2019). Although the data analysis process appears linear in its description, the process is dynamic and repetitious in nature (Scott & Medaugh, 2017).

The researchers collaborated with a data analysis expert to review the open, axial, and selective coding processes during data collection. At the point of analysis where the researchers believed adequate codes and categories existed to finalize a theory, the data analysis expert was consulted to determine the thoroughness of the analysis and identify any gaps or problems with integration (Corbin & Strauss, 2015). Once the data analysis expert was satisfied with the internal consistency and logic of the completed processes, the researchers used the guidelines of Corbin and Strauss (2015) to begin theory finalization. First, the researchers analyzed the theory for any discrepancy in the logic or problems with how the concepts fit. The researchers examined the data categories to ensure they were thoroughly defined and consisted of variability to ensure saturation. Next, the researchers reviewed portions of the theory deemed to be lacking solid support and integrated additional data supporting the categories to strengthen the theory. Finally, the researchers disclosed factors that may limit the theory's applicability and disclosed areas for future study.

Study Rigor
The researchers established credibility through maximum variation sampling, triangulation of data sources, member checking, using a reflective journal, and explaining outliers in the data (Corbin & Strauss, 2015; Creswell & Poth, 2018; Krefting, 1991; Letts et al., 2007). To address transferability, the researchers provided information about the context of the study in detail (Krefting, 1991; Letts et al., 2007). The researchers implemented an audit trail to increase the dependability of the study (Creswell & Poth, 2018; Krefting, 1991; Letts et al., 2007) and addressed confirmability using reflective journaling to identify and fully account for researcher bias (Letts et al., 2007). Triangulation of data across participants and interviews confirmed the conclusions (Krefting, 1991). A data analysis expert from a university audited the coding and theory development process to ensure the researchers used proper procedures and clearly defined steps (Krefting, 1991; Letts et al., 2007).

Results

Sample characteristics of the 26 participants are described in aggregate to maintain participant confidentiality. Twenty-four females and two males comprised the sample. Twenty-three students were in an entry-level master program and three in an entry-level doctoral program. Five students were in the first year of graduate school, and one student was in the middle of the program. Eighteen students were in the last semester of didactic classwork before Level II fieldwork, and two were in the final year of doctoral work.

Theory Constructs

Nine propositional statements emerged during the data analysis process. Propositional statements and supporting quotes are summarized in Table 1.

Table 1

Propositional Statements That Emerged During Data Analysis and Link to Developed Theory

Propositional Statement	Link to Developed Theory (see Figure 1)	Supporting Quotes
The Meaning of Occupational Balance is Expressed Through Personal Values and Past Life Experience	Occupational Balance	I played volleyball, so my time management skills are impeccable. [If] I have 15 minutes, I finish this assignment and submit it [not] … just like sit on my phone or something (Interview 9). It was just me pushing myself, and I freaked out. … I did average. And I don't do average (Interview 10).
Occupational Balance Disruptions Can be Identified	Balance Disruptions ->Awareness	My dad was like, you need to do something other than studying. You're going to be miserable (Interview 6). I had some very serious conversations with my mom about how you can't fill someone else's glass up when your glass is empty (Interview 3).
Students Implement Strategies to Return to Occupational Balance	Balance Disruptions -> Desire to Change Return to Occupational Balance ->	Even if I knew a topic, I was spending all the time reading every single word of every single chapter. … I was spending a lot of time looking at the same information and … so I got into better methods of highlighting less, writing down only like new information, things I didn't know, more important information (Interview 10).

|	Balance Strategies	See Table 2.
Developing and Maintaining Peer Relationships Assist Students in Managing Disruptions to Occupational Balance	Balance Disruptions –> Micro Balance Influences ->Peer Relationships	My group of friends, like we typically share grades with each other. So it really makes you feel better if someone else did poorly too. … Knowing other people did bad as well, like makes you feel better about it (Interview 18). One of my best friends was in speech path. So I'd like call her, and she would get like the grad school aspect of it. … No one gets it unless you're in grad school (Interview 5).
Changes in Life Roles During the Graduate Program Influence Occupational Balance	Balance Disruptions –> Micro Balance Influences ->Changes to Life Roles	Because of the extended [work] hours, I had to kind of push my school assignments back… I ended up having to do a lot of assignments and schoolwork over the weekend, which impacted my ability to engage in the activities I wanted to with my friends (Interview 1). My grandma just broke her leg and my grandpa has severe dementia, so my dad is caring for them… So I've stepped it up, helping in the kitchen and cleaning and making sure everything's okay around here so he can worry about everything over there and not worry about anything at home (Interview 9).
Experiencing the COVID-19 Pandemic Created Traumatic Disruptions That Significantly Challenged Occupational Balance and Required Altered Strategies to Manage	Balance Disruptions –> Macro Balance Influences ->COVID-19	I feel like lately, especially with being in this wonky format and trying to figure things out, it's been a lot more difficult and a lot more unbalanced. I feel a lot more stressed and a lot more exhausted, mentally and physically (Interview 3). It's hard to work at home because there's like a couch and a TV, and my grandma's there, and it's easily distractible at the house (Interview 7). [Professors] just kind of went about things business as usual, just over a screen. I found myself waking up at like 6 a.m. and being on my computer until after midnight just trying to get everything done (Interview 19).

		I think the more challenging thing has just been the fact that … our cohort hasn't really gotten to know each other personally and do a lot of like social things that normally the first years do (Interview 21).
Reflecting on Past Graduate Program Experiences Helped Students Manage Disruptions to Occupational Balance	Balance Disruptions –> Micro Balance Influences-> Mindset Shift	There were times I felt anxious, and it was unnecessary to have those expectations for grades because when you get out of OT school, they're not going to be like, so what was your GPA in OT school (Interview 20)? When I got here [graduate school] all I did was study. I barely was making time for eating and socializing. And I realized how mentally exhausted I was. I just realized like, how important it is to not let one aspect of life consume your life (Interview 6). Overcoming that first semester when I … didn't know if I was going to pass anatomy. I was like, okay, if you got through a class that was this hard, you can get through your other classes (Interview 12).
Occupational Balance Fluctuates Within the Graduate Program Experience	Balance Disruptions –> Macro Balance Influences-> Different Semesters and Different Points in a Semester	Our first semester is stressful, and you just cannot find time to fit all the readings and all the assignments in. You don't know what's going on half the time, and you're just scared that you're going to fail out of the program (Interview 7). Every semester you kind of start out a little bit unorganized and then learn how to organize and fit in the balance. I … reassess every single semester. …It was definitely harder before I knew every professor, because there are definitely differences in how you're going to do assignments and … the expectations (Interview 11). I wasn't as nervous to start this [third] semester as I was like even spring [second]. I'm definitely more comfortable. I know what to expect (Interview 5).

Theory of Occupational Balance
The researchers of the present study created a new Theory of Occupational Balance for OT students using a grounded theory approach (see Figure 1). The meaning of occupational balance is unique to each OT student based on personal values and life experiences. Results from the data analysis demonstrated that students progressed through three phases of occupational balance. The three phases are depicted in Figure 1 and include: occupational balance, balance disruptions, and return to occupational balance. Once a student experienced a disruption to occupational balance, the student needed to become aware of it. Some students self-identified disruptions, but others received input to help them recognize changes in their occupational balance. Students then had to desire a return to balance to be motivated to implement a strategy to achieve balance based upon the magnitude of the disruption and whether the students experienced something similar in the past. Examples of strategies students integrated included developing an individualized plan for organizing schoolwork, sharing experiences with cohort peers, and scheduling time for self-care. Finally, the students remain in a state of occupational balance until another disruption occurs as long as they continue implementing their chosen strategies. When another occupational balance disruption occurs that challenges the effectiveness of current strategies, the process of identifying the disruption, implementing new or modified strategies, and returning to occupational balance begins again.
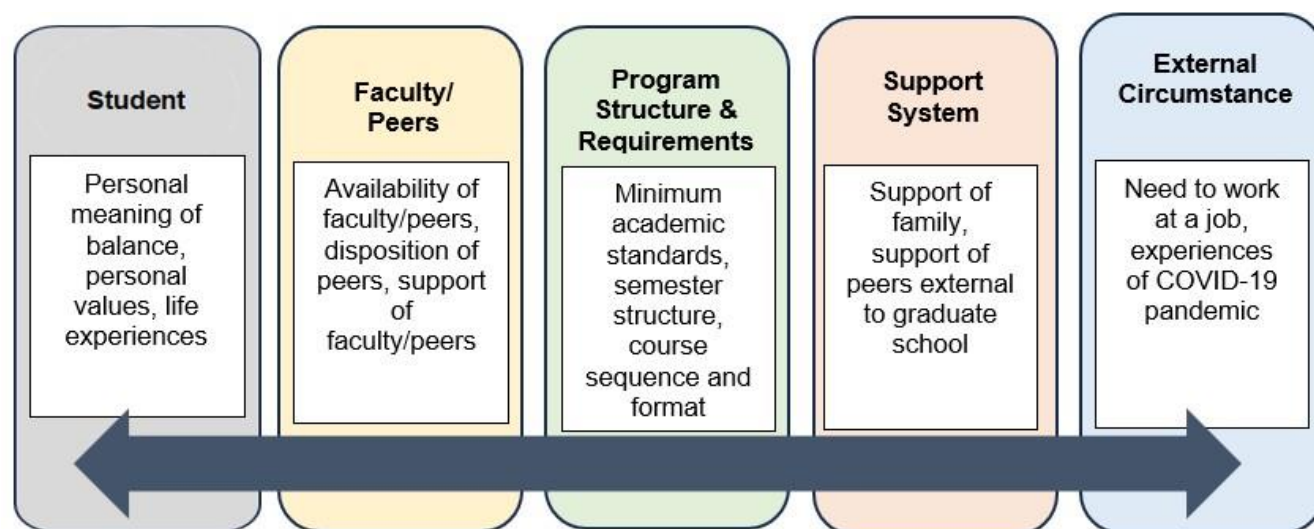
Figure 1

Theory of Occupational Balance
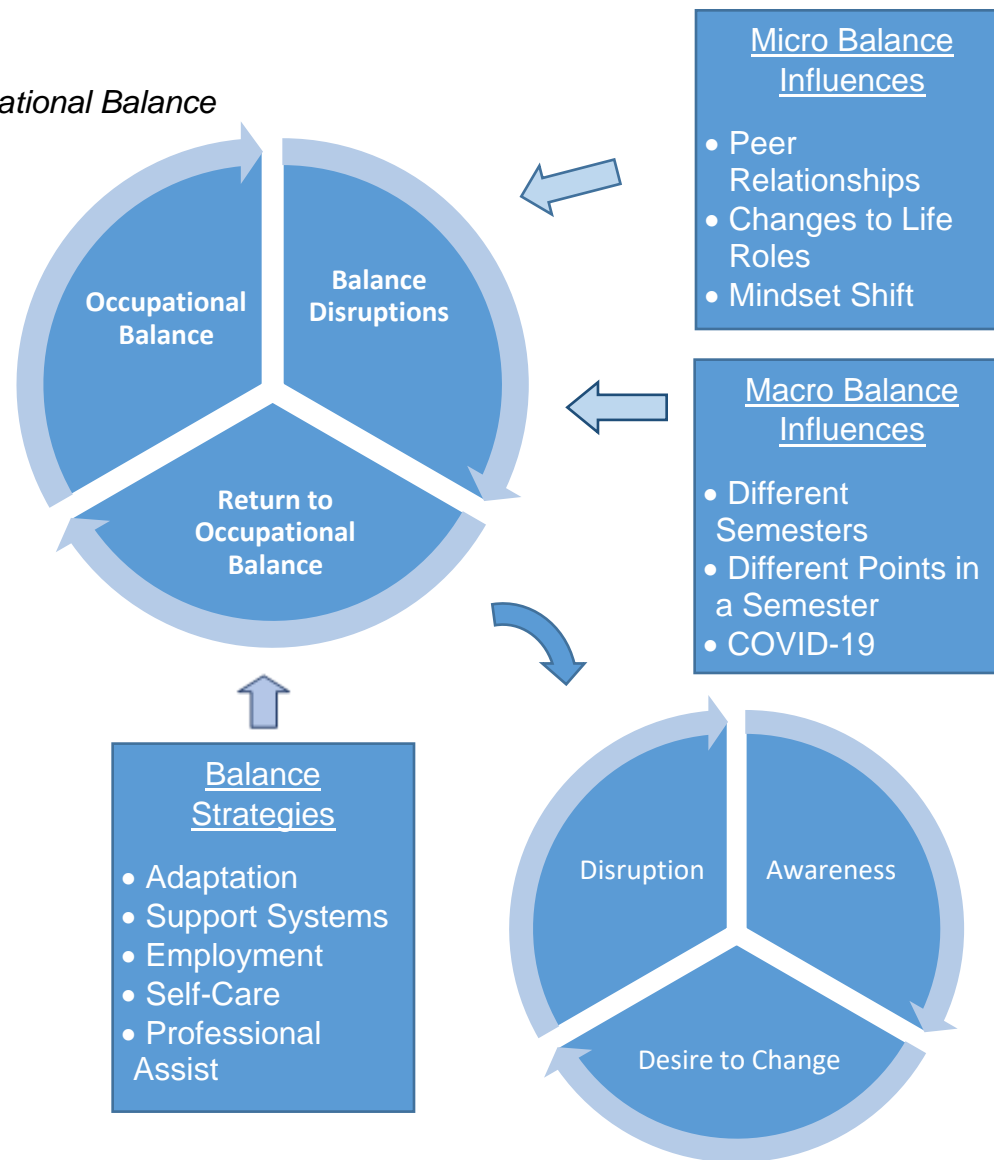
Data analysis indicated that at different points throughout the OT program, students encountered people, policies, changes in roles and expectations, or events that led to a disruption in occupational balance. Occupational therapy students experienced micro and macro influences to occupational balance throughout their time in a graduate program, depicted in Figure 1. Whether a disruption occurs from these influences depends on the combination of various contextual factors the students may experience at the time of the occurrence. Figure 2 displays the various internal and external contexts that influenced student occupational balance. These contexts interact in dynamic ways, depicted by the arrows on the diagram (Corbin & Strauss, 2015). Each context influences the others in an ever-changing sequence of actions and interactions.

Figure 2

Conditional/Consequential Matrix of Graduate Student Occupational Balance

Student	Faculty/ Peers	Program Structure & Requirements	Support System	External Circumstance
Personal meaning of balance, personal values, life experiences	Availability of faculty/peers, disposition of peers, support of faculty/peers	Minimum academic standards, semester structure, course sequence and format	Support of family, support of peers external to graduate school	Need to work at a job, experiences of COVID-19 pandemic

As described in Figure 2, student values and previous life experiences influenced how they viewed a situation and formulated a reaction (Figure 2, Column 1). Internal to their academic program, faculty and program peer interactions influenced whether an OT student remained in a state of occupational balance when faced with challenges or whether a student experienced a disruption to occupational balance (Figure 2, Column 2). Program policies, such as professional and academic standards, and university structure, such as semester length, also contributed to a student's occupational balance (Figure 2, Column 3). The availability of external support systems, such as family members and peers external to graduate school, also influenced students' reaction to stressors and their ability to return to occupational balance after a disruption (Figure 2, Column 4). Lastly, external circumstances, such as the COVID-19 pandemic, led to disruptions in occupational balance (Figure 2, Column 5).

By incorporating previous successful strategies, students could move back into occupational balance quicker than they did in the first semester. An exception was the changes experienced from the COVID-19 pandemic, which created a disruption to occupational balance that students did not recover from quickly. Students equated the changes to the student role experienced during the COVID-19 pandemic, such as courses moving to an online format, to changes the students experienced during the initial transition to entry-level OT graduate school. The disruption that ensued required students to reexamine their strategies to return to occupational balance and, in some instances, to develop new strategies for this novel situation.

Study participants reported feeling they were occupationally balanced by the time they completed the OT program. They learned how to integrate strategies, such as sharing experiences with cohort peers, developing methods of organizing schoolwork, and making time for self-care. Rather than wait for a disruption to occur, as at the beginning of the OT program, students were proactive in employing strategies to improve occupational balance and, therefore, experienced fewer disruptions.

The researchers did not find any other grounded theories in the literature of occupational balance in OT students. Results of the present study advance the information from Malek-Ismail and Krajnik (2018) with the researchers able to identify specific strategies OT students used to regain occupational balance. Furthermore, some students in the present study were unable to independently identify the need to make a change to return to occupational balance, a unique finding of this study. Another distinctive finding is that students who experienced a disruption to occupational balance may reflect on strategies used in the past to help them regain occupational balance. Lastly, the COVID-19 pandemic created an unexpected disruption such that students described the resulting occupational balance disruption as difficult to manage. The information gleaned from students regarding the strategies to return to balance after a major disruptive event is also an original finding of this study.

Discussion

The purpose of this study was to explore OT students' occupational balance and to examine how OT students' experiences in a graduate program promoted or inhibited occupational balance. This study also addressed a gap in knowledge about strategies students in OT programs use to achieve occupational balance. Data analysis resulted in nine propositional statements that are used to organize the discussion below. Literature related to the propositional statements is compared to the results of the current study. Following the discussion is an explanation of the theory of occupational balance that was inductively derived to explain how some students find occupational balance, even under challenging circumstances, but others experience difficulty achieving occupational balance when encountering similar challenges.

The Meaning of Occupational Balance is Expressed Through Personal Values and Past Life Experience

Study participants all indicated they had, at a minimum, a rudimentary understanding of occupational balance from their foundational occupational therapy courses. The primary researcher asked each participant what occupational balance meant to them as part of the interview process. The *Occupational Balance* section of Figure 1 depicts how study participants' past life experiences and personal values contributed to their view of occupational balance. Matuska and Christiansen's (2008) model of lifestyle balance supports the findings in this study that past events influence current views of occupational balance. Although the authors did not discuss occupational balance specifically, they suggested lifestyle balance exists as a range of occupations a person engages in throughout life.

Similarly, participants expressed their personal values contributed to maintaining a state of occupational balance. Participants who had the value of balance instilled in them during the formative years demonstrated a desire to remain occupationally balanced. Eklund et al. (2017) provided evidence of the connection among a person's inherent personal values, choice of occupations, and sense of occupational balance. Wagman et al. (2021) added that occupational balance can vary significantly among people depending on the personal meanings a person ascribes to the term.

All participants interviewed described a disruption to occupational balance during the program, represented by the *Balance Disruptions* section of Figure 1. Several participants expressed an understanding that the situation was temporary and was an expected part of the graduate program experience. They expressed the belief that the short-term disruption was tolerable. Matuska and Christiansen (2008) suggested that people who are satisfied with how they use their time and are working toward important personal goals may perceive they are balanced even when devoting a disproportionate amount of time to one occupation. Students may perceive they are occupationally balanced even when managing rigorous academic workloads because they expect to spend most of their time on schoolwork at this stage of life.

Occupational Balance Disruptions Can be Identified

Twenty-two participants (85%) stated they recognized when they were experiencing a disruption to occupational balance, shown in Figure 1 by the *Awareness* portion of the diagram. This recognition enabled participants to implement one or more strategies to overcome the disruption and return to a state of occupational balance, shown by the *Desire to Change* section of Figure 1. Similarly, Van Veld et al. (2018) conducted a study with students in the first year of a Doctor of Physical Therapy (DPT) program. The authors discovered that students who were conscious of negative feelings about the graduate program could think intentionally about the positive aspects of their experience, thereby helping the students to modify their current circumstances to promote a positive outlook. A unique finding of the present study was that occasionally a participant could not identify a disruption to occupational balance and required input from family, friends, or faculty to realize a change was necessary.

Students Implement Strategies to Return to Occupational Balance
When asked specifically about their occupational balance, 18 participants (69%) indicated disruptions to occupational balance occurred during the first-semester transition to graduate school, but all participants reported fluctuations in occupational balance across the entire graduate program experience. Participants were asked what they did to improve their occupational balance once they recognized a disruption. They identified adaptation strategies, experiences, new thought processes, and support systems that helped them regain a sense of occupational balance throughout their time in graduate school (see Table 2). The methods participants employed to regain occupational balance are depicted in Figure 1 by the *Balance Strategies,* and *Return to Occupational Balance* sections. Similarly, Breen-Franklin and colleagues (2022) designed an occupational balance course assignment that prompted students to identify a component of one of their occupations in need of modification to improve occupational balance. Through discussion with peers, and as part of the assignment, students developed strategies to modify the component of occupation. Unique to the present study, students identified the strategies without instructor prompting to improve occupational balance or prevent an occupational balance disruption.

Table 2

Strategies OT Students Use to Manage Occupational Balance in Graduate School

Strategy	Supporting Quotes
Students Adapt Methods for Learning	
Develop different or more effective study habits	I had to retrain myself on different study habits [to] make sure I was focusing on things long term so I could understand and be able to apply them (Interview 3).
Organize schoolwork	I know people in the class who color code and I know people who don't write anything down. So just finding that medium of tracking information [that works for me] (Interview 1).
Utilize free time effectively	Fridays we don't have class. So I do some of the assignments that are due during the week so I can prepare and not have to spend all weekend on something (Interview 4).
Students Use Support Systems to Assist with Managing Disruptions to Occupational Balance	
Parental Support – financial	I don't have to worry about rent or anything. [Parents] help take care of that (Interview 4).
Parental support – emotional	If I'm really stressed out, I always call my mom. She'll calm me down (Interview 5).
Faculty accessibility	I knew that I could knock on anyone's door, ask them a million questions, and they would all get answered (Interview 3).

Strategy	Supporting Quotes
Peer relationships	Having that close knit relationship with people who understand what you're going through is very beneficial. I could not have made it out without my friends in the program (Interview 3).
Participating in Multiple Occupational Roles Contributes to Occupational Balance	
Paid employment	I decided to get a job. Just because like I wanted to work and I wanted to do something out[side of school] (Interview 8).
Activities outside of academics	You can't let one facet of your life overrule everything else, because then you're just not going to be happy, and you're not going to be somebody others want to be around (Interview 6).
Making Time for Self-Care Helps Minimize Disruptions to Occupational Balance	
Engage in gratitude and spiritual reflection	I thanked God every day that I was in the program because it was a rigorous application process. I was thankful to be there, and even though some days were more difficult than others, I knew that this was the profession that I wanted to pursue and I knew why I wanted to do it (Interview 11).
Listen to your body	At the beginning of the week if I know I'm just completely exhausted like I'll kind of, call it quits for the night. And I'll just say, "I'll get it done tomorrow (Interview 8).
Schedule self-care	I have a planner. So, I write everything in, and then I try to put in during the week when I will plan in my workouts (Interview 11).
Make small changes	I made small changes … to like incorporate more time for myself. I started going to a TV show watch party every Monday night. And that was my break from studying (Interview 6).
Knowing When to Seek Professional Assistance Helps Manage Disruptions to Occupational Balance	
Pharmacological therapy	I've been put on medicine and I'm a lot more mellow (Interview 3). I went to the doctor, I told them I struggled with anxiety … and went about finding a good mixture of … medications that worked well for me (Interview 13). I saw a doctor to get on medication because … talking to other students in the program, a lot of people have medication … [I realized] this [anxiety] is an actual thing and nobody's going to that I'm lesser than because of it (Interview 26).

Developing and Maintaining Peer Relationships Assist Students in Managing Disruptions to Occupational Balance
In the present study, participants described peer relationships as crucial to success in the program, shown in Figure 1 under *Micro Balance Influences*. Peers understood the demands of the graduate program and could provide encouragement and suggestions relevant to the circumstances. Eklund et al. (2017) supported this finding that positive social networks can improve participation in occupations and contentment with occupational balance. Govender et al. (2015) reported one of the most common coping mechanisms OT students used to manage stress was social support.

In the present study, socialization with peers outside of the OT program was important because they provided a distraction from academics that helped participants engage in self-care practices. Tompkins et al. (2016) ascertained that graduate students perceived the support they received from cohort peers and those outside of their program as equally important in their success.

Changes in Life Roles During the Graduate Program Influence Occupational Balance
Study participants discussed several changes in their life roles that disrupted occupational balance, represented in Figure 1 under *Micro Balance Influences*. One of the changes was paid employment. Participants secured a job for various reasons, including the necessity to afford living expenses. Backman (2004) suggested that occupational imbalance occurs when necessary and desired occupations intersect. These occupations can impede each other when an OT student does not allot enough time to entirely engage in one or both of the occupations. If work interferes with the completion of academic work, a disruption to occupational balance may occur.

Study participants experienced other life roles that included planning for the birth of a child, caring for an ill family member, and assuming household responsibilities, all of which led to an occupational balance disruption. Yazdani et al. (2018) confirmed this finding by discussing potential causes of occupational balance disruptions, including "role imbalance, responsibilities, and priorities at present" (p. 293). These contextual factors diminish a person's control and may interfere with personal goals, thereby disrupting occupational balance.

Experiencing the COVID-19 Pandemic Created Traumatic Disruptions That Significantly Challenged Occupational Balance and Required Altered Strategies to Manage
Data collection for this study occurred during the COVID-19 pandemic and participants indicated the COVID-19 pandemic was one of the major disruptions to occupational balance they experienced in graduate school, portrayed in Figure 1 under *Macro Balance Influences*. When the COVID-19 pandemic began, participants reported feeling a sense of unbalance similar to when they first transitioned to graduate school. Identifying a disruption of equal or higher magnitude to the disruption that occurred during the initial transition to the graduate program was a unique finding of the present study. Previous authors did not discuss a major disruptive event like the COVID-19 pandemic for students in OT programs or in any other disciplines.

Study participants had to change their method of organization when the mode of delivery switched to virtual from in-person instruction. Participants reported they had to develop new study habits because their previous ones were no longer adequate. Mitschke et al. (2021) reported graduate students experienced challenges related to the COVID-19 pandemic, including "higher levels of stress, feeling overwhelmed with responsibilities, and having difficulty concentrating on their classwork" (p. 51). Kee (2021) noted that graduate students experienced heightened anxiety over the unpredictable nature of the move online. In addition, social isolation created a barrier to support systems, and many activities for self-care were no longer possible (Kee, 2021).

Several participants expressed beliefs that a boundary between their academic and personal lives was nonexistent because their home became their classroom. Kee (2021) found graduate students believed the COVID-19 pandemic disrupted their work-life balance as they were using their homes for their personal and academic lives. Similarly, Sharma and Tyszka (2023) discovered the COVID-19 pandemic negatively impacted students' mental health, in part because of the isolation that resulted.

Conversely, some participants reported improved occupational balance with the move to online learning. For example, several participants explained their commute was abolished. Participants perceived they had more time to get homework completed because they did not have to engage in self-care routines to attend class in person. Varadarajan et al. (2021) and Sharma and Tyszka (2023) also reported positive outcomes of the COVID-19 pandemic, including increased time for learning, self-care, time with family, and decreased time commuting to attend class.

Reflecting on Past Graduate Program Experiences Helped Students Manage Disruptions to Occupational Balance
Study participants expressed the importance of personal reflection to assist in returning to occupational balance following a disruption. A finding unique to the present study was that participants reflected on past experiences in the OT program to help formulate appropriate responses to occupational balance disruptions. They also discussed changing their perspective away from seeking perfection and toward integrating personalized approaches to improve performance in graduate school. These findings are illustrated in Figure 1 under *Micro Balance Influences, Mindset Shift*.

Occupational Balance Fluctuates Within the Graduate Program Experience
Fluctuations in occupational balance within the graduate school experience are shown in Figure 1 under *Macro Balance Influences*. Study participants overwhelmingly described the first semester of the program as the semester that caused the most occupational balance disruption. Participants experienced new academic requirements, unfamiliar course structures, and difficult assessments in the first semester. Malek-Ismail and Krajnik (2018) confirmed students reported a high level of life imbalance in the first semester of the OT program (p. 8). This finding contrasts with Govender et al. (2015), who discovered fourth-year OT students reported the most stressors.

Study participants in the first semester managed disruptions initially through trial and error of various strategies they developed or other people suggested. Participants in the first semester discussed spending increased time on academics, which translated to little time for self-care or leisure. They also perceived a lack of time to develop social connections, contributing to occupational balance disruptions. As study participants learned to navigate graduate courses and developed relationships with peers and professors in later semesters, occupational balance disruptions lessened.

Several study participants described the beginning of a semester as disruptive due to exposure to new course content and new instructors. However, participants became more comfortable with faculty and graduate program expectations as each semester progressed. Van Veld et al. (2018) discussed similar findings in their study, reporting increased confidence in DPT students' ability to respond to stressful situations as they progressed through three consecutive semesters (Van Veld et al., 2018). Current study participants perceived balanced lives by the end of the program or indicated an understanding that the imbalance they experienced was temporary. They reported increased time for socialization and self-care activities.

Implications for Occupational Therapy Education

This study may benefit students in OT graduate programs, administrators, and faculty. Understanding student occupational balance and circumstances that can cause disruptions may help prevent disruptions from creating unmanageable stress. In addition, understanding strategies students can implement to return to occupational balance may help faculty suggest options for students who cannot self-manage an occupational disruption.

Students in graduate programs may benefit from using the strategies the participants described in this study to return to occupational balance following a disruption. The information presented in this paper may be beneficial especially to OT students transitioning to entry-level graduate school. Graduate programs present a new way of learning, yet many students are not equipped with study habits to transition without increased anxiety and stress. Additionally, many students relocate to a new city for their graduate program and do not have an easily accessible social network. Students in this study explained that time along with trial and error were necessary to figure out how to navigate the OT program. Retaining occupational balance involved determining a study plan and selecting methods of organizing course work to manage the rigor of the program. Integrating the strategies from this study can provide a starting point for figuring out an effective method.

The researchers found that some students are uncomfortable speaking with faculty about concerns, especially at the outset of the OT program. If students do not communicate concerns, faculty may not realize the anxiety and stress students experience in the OT program. Participants in this study remarked on the importance of early connection with a faculty advisor, especially if they did not know anyone else in their cohort. Student confidence in themselves improved with the knowledge faculty were available to talk to them and help them with coursework. These findings provide faculty with insight into students' viewpoints and encourage faculty to initiate

communication with more reserved students who do not contact faculty. In addition, faculty can provide OT students with strategies discussed in this study as suggestions for improving occupational balance after experiencing disruptions throughout the OT program. Finally, faculty can facilitate the relationship-building of students within the program. For example, faculty can assign peer mentors to assist new OT students in navigating some of the initial challenges of starting a new program (Mitschke et al., 2021). Another suggestion is to host networking sessions for new cohorts so students can meet peers and build relationships outside of the classroom (Mitschke et al., 2021).

Results of the present study can inform program administrators and faculty about the implications of curriculum design for the occupational balance of OT students. Accreditation standards require faculty in OT programs to include extensive content (ACOTE, 2022). Faculty in OT programs often are clinicians who transition to academics and do not possess extensive knowledge in curriculum design (Foy, 2017; Sparks-Keeney & Jirikowic, 2020). This lack of knowledge can lead to unevenly dispersed credit hours among semesters. Students may experience several courses with greater difficulty or courses with dense and complex information in the same semester, which may increase student stress. Faculty may not adequately discuss course content and requirements with other faculty in the program leading to content redundancies or lengthy assignments due at the same time. All of these curriculum scenarios may contribute to occupational balance disruptions for OT students.

To assist OT students' return to occupational balance or avoid a disruption, faculty can plan time in class to complete assignments. Faculty meetings should include discussions about student behaviors that may indicate occupational balance disruptions. Faculty can plan curriculum retreats to review course content and ensure it is scaffolded and reinforced, avoiding unnecessary redundancies (Krusen, 2020). Integrating a curricular thread of self-care to teach OT students mindfulness techniques and other strategies may improve the ability of students to manage stress (Cahill, 2021). These skills may improve job satisfaction and quality of life once students become occupational therapists (Bodenheimer & Sinsky, 2014; Sikka et al., 2015).

As noted throughout this study, other circumstances may arise in a student's career that may create a disruption of a similar or greater magnitude as the initial transition to graduate school. The COVID-19 pandemic was such a disruption, but conditions that surround experiences such as political or cultural unrest could potentially have a similar impact on the experience of OT students, regardless of program format. Although these disruptions are different than a worldwide pandemic, they could cause an unexpected disruption for a singular student or group of students. Understanding the causes of disruptions to occupational balance during these unexpected and disruptive situations should encourage faculty to automatically implement strategies to increase student retention and success.

Limitations and Future Research
In the present study, the sample of 26 participants included students from seven universities in the Midwest; therefore, the results may not apply to OT students in other parts of the country. Students were from master's and doctoral programs. Sampling

students from one type of program may produce results specific to the program that would not apply to other educational levels. Lastly, sampling of students occurred from various points in their graduate program from the first semester through the end of their program. Sampling students who are at the same place in their program may provide insights into how occupational balance varies across programs at specific points in the program. Although interview questions discussed occupational balance, it is possible students confused the ideas of stress and occupational balance which may have skewed the results.

Data collection and analysis was conducted predominantly by the primary researcher with input from the other researchers about methodology. Having more than one researcher collect and analyze data may provide more dependability in the results. All interview transcripts were sent to participants to check for accuracy, but only 72% of participants verified their transcript, which may have resulted in incorrect data being recorded in the remaining transcripts. Additionally, as data were analyzed, the primary researcher sent results to participants to check the developing theory matched participants' experiences of occupational balance. No participants replied with input which may have impacted the accuracy of the theory. Taking more time to follow up with participants and obtain input regarding theory finalization is important for future studies. Finally, occupational balance is not clearly defined in the literature, therefore each student ascribed their own meaning to the term. This variability in definition may have influenced how students discussed the concept. Providing future study participants with a pre-determined definition may assist with generalizability of results.

Data for this study were collected during the COVID-19 pandemic which may have impacted student experiences and responses. Students discussed the concept of occupational balance but confounding factors such as increased stress levels and isolation that resulted from the pandemic were not considered. Future studies that occur outside such a traumatic context can provide clarification about OT student occupational balance and the role faculty can have in identifying disruptions and helping students prevent them.

Conclusion
The presented Theory of OT Student Occupational Balance indicated students developed a meaning of occupational balance based on past experiences and personal values. Disruptions to occupational balance, affected by micro and macro influences, occurred throughout the graduate program and within individual semesters. Students needed to identify disruptions to occupational balance and desire to make a change before they could implement a strategy to return to occupational balance. This study reveals several strategies OT students implemented, including adapting methods to effectively and efficiently learn, using support systems, participating in multiple occupational roles, making time for self-care, and knowing when to seek professional assistance. Students remained in a state of occupational balance until faced with another disruption, beginning the cycle again of identifying the disruption, implementing a strategy, and returning to occupational balance.

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