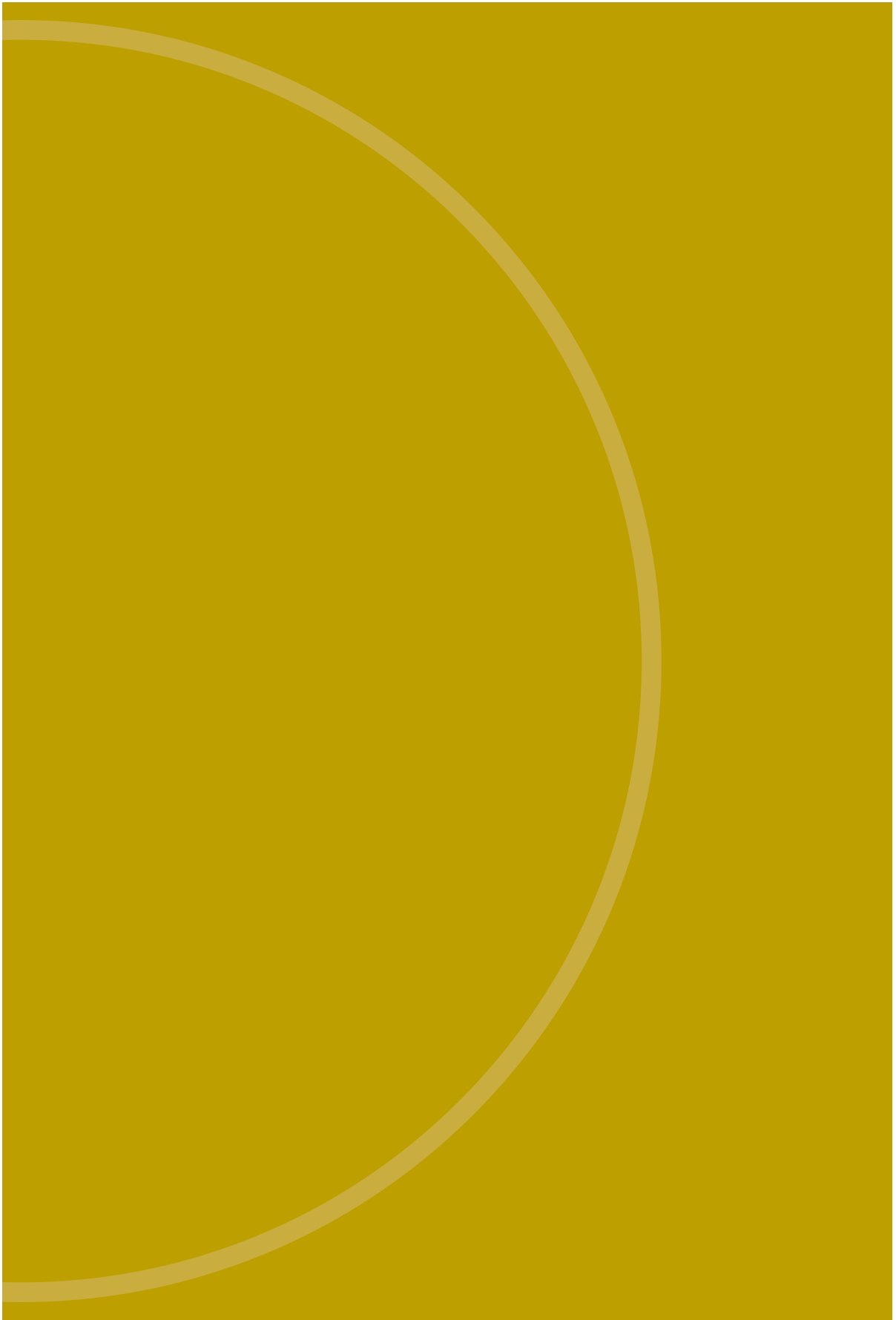




2001
Annual Report

THE AMERICAN OCCUPATIONAL THERAPY FOUNDATION







The American Occupational Therapy Foundation

Exploring the Relationship between Occupation and Health

The Foundation's Mission

Through the use of its fiscal and human resources, the American Occupational Therapy Foundation works to expand and refine the body of knowledge of occupational therapy and promote understanding of the value of occupation in the interest of the public good.

The Foundation's Vision

AOTF promotes a society in which individuals, regardless of age or ability, may participate in occupations of their choice that give meaning to their lives and foster health and well-being. Through its dedication to scientific inquiry, education and leadership development, the Foundation pays tribute to the significance of everyday activities in enabling those who face personal challenges to realize their full potential.



Chartered in 1965 as a 501 (c)(3) charitable, nonprofit organization, the American Occupational Therapy Foundation (AOTF) actively solicits tax-deductible contributions to support a broad range of initiatives that promote education and research to advance excellence in occupational therapy. Visit the AOTF website at www.aotf.org to learn more about the services and programs the Foundation offers on behalf of the profession.

President's Message



On behalf of the Board of Directors of the American Occupational Therapy Foundation, I would like to thank our many friends and colleagues whose generosity was invaluable in helping us achieve our goals on behalf of the profession. Working together, we create rich opportunities for occupational therapy through education and research.

Our lives were forever changed in September 2001. The power of occupation may never have been more apparent than when we were challenged to move forward in the wake of September 11th. The Foundation reacted quickly with a new initiative launched by its Institute for the Study of Occupation and Health. This initiative is only one of the Foundation's many contributions to promote relevance of occupation to the health of individuals, families, and communities.

The progress of the past year would not have been possible without the continuing support of the over 42,000 donors including the membership of the American Occupational Therapy Association. Thank you for making 2001 another banner year for the programs and initiatives of the Foundation.

With great appreciation,

A handwritten signature in blue ink that reads "Jane Davis Rourk". The signature is written in a cursive, flowing style.

Jane Davis Rourk, OTR/L, BCP, FAOTA
President



The AOTF Institute for the Study of Occupation and Health

During the past year, AOTF launched its Institute for the Study of Occupation and Health to serve as the umbrella for the Foundation's programs and services that support occupational therapy research and education. The Institute offers dynamic means through which the Foundation disseminates information, documents the effectiveness of occupational therapy practice, and supports graduate education.

Disseminating Information . . .

AOTF Task Force on Occupation in Societal Crises helps people deal with the cumulative and pervasive effects of fear and loss associated with stressful events such as September 11th. Articles written for both the popular and professional press seek to increase understanding of how participation in occupations can restore and maintain a healthy balance in life and reduce the devastating effects of post-traumatic stress.

OTJR: Occupation, Participation and Health, the Foundation's completely redesigned research journal, focuses on the role occupation plays in promoting or restoring health and in fostering full participation in family, work, and the community. This quarterly journal will provide a forum for the growing cadre of occupational scientists from multiple disciplines to discuss and share their research results.

The Wilma L. West Library houses an extensive collection on the study of occupation and the practice of occupational therapy. Its resources include publications from the early 1900's to the present, unpublished materials,

doctoral dissertations, and master's theses. Patrons can browse the catalog or search the occupational therapy literature using OTSEARCH, the profession's on-line database of 33,400 records. In 2001, library staff provided reference services and literature searches for over 2,700 individuals and filled 350 interlibrary loan requests.

AOTF Resource Notes offer insights into occupation as it relates to current societal issues. The Notes draw from a broad spectrum of contemporary sources and include citations, abstracts, and links to related websites. Interested parties may use the Resource Notes to further their exploration of the featured topics. The Resource Note is posted to the AOTF website, www.aotf.org, and distributed by email.

Advancing Practice . . .

The Center for Outcomes Research and Education at the University of Illinois at Chicago (CORE) has achieved an impressive return on the investment of AOTA, AOTF, and its corporate partner, Smith & Nephew—Rehabilitation Division to document the effectiveness of occupational therapy. Two years into its three-year contract, 19 CORE fellows received over \$8.7 million in external funding to conduct 28 occupational therapy outcome studies. The topics range from universal design to domestic violence. CORE fellows serve as role models and mentors in advancing occupational therapy practice through outcomes research. Visit www.uic.edu/ahp/OT to learn more about CORE.

“Understanding Habits in Context” was the second research conference sponsored by AOTF with funding from the RGK Foundation and the National Center for Medical Rehabilitation Research at the National Institutes of Health. More than 70 scholars from twelve disciplines debated the meaning and implications of habits for health and the social policies that support or detract from the effectiveness of habits. Proceedings of this conference were published as a supplement to the Winter 2002 issue of *OTJR: Occupation, Participation and Health*.

Supporting Education . . .

Regional Education Workshop Series was designed by AOTF in collaboration with AOTA and the Accreditation Council for Occupational Therapy Education to assist occupational therapy educators in their transition to post-baccalaureate professional entry. The workshops include concepts of graduate education, strategies for faculty development and methods for integrating research, evidence-based practice, and non-traditional fieldwork experiences. To date, 145 academic and clinical faculty members from 21 occupational therapy programs have participated in revising and adapting their curriculum designs.

Research Across the Curriculum: A Guide for Occupational Therapy Educators, a recently released monograph edited by Elizabeth Crepeau, describes how faculty can incorporate research-related topics into occupational therapy curricula. This is a valuable resource for educators as they prepare to meet the profession's revised accreditation standards. This publication may be purchased on-line via the Foundation website, www.aotf.org.

Mentoring in Curriculum Development, a pilot study sponsored by the Foundation, examines the effects of a mentoring process in changing curriculum structure and developing scholarly communities. Five schools, selected for their potential to produce the next generation of educators and scholars, are working with curriculum mentors to explore innovative and flexible strategies that support graduate education.

Doctoral Network proudly stands at 631 members. Through the Foundation's web site, members may locate colleagues in the directory, access the list of doctoral dissertations in the library's collection, and receive the Foundation's weekly Resource Note.

AOTF Scholarships awarded in 2001.

Post Professional Graduate Study in Occupational Therapy

- Willard and Spackman Memorial Scholarship—\$2000
Chiung-ju Lui, University of Kansas

Post Professional Graduate Study in a Related Field

- Mary Minglin Memorial Scholarship—\$2000
Janet Brooks, University of Massachusetts at Lowell
- Mary Fiorentino Memorial Scholarship—\$2000
Wendy Hildebrand, University of Kansas

Professional Master's Degree Study

- Kappa Delta Phi Scholarships—\$1000 each
Oscar Vallejo, University of Southern California
Gina Tinsley, Samuel Merritt College
- Kappa Delta Phi Scholarships—\$500 each
Bethanie Grimard, Springfield College
Lisa Massey, Nova Southeastern University
- AOTF Endowment Scholarships—\$500 each
Carla Hamilton, University of Oklahoma Health Sciences Center
Michelle Tannenbaum, Towson University



Baccalaureate Degree Study

- Kappa Delta Phi Scholarships—\$1000 each
Meghan Henry, University of Southern California
Ann Hutchison, University of Puget Sound
- Tom Cole Memorial Scholarship—\$500
Melanie Hughet, Indiana University
- ASCOTA Scholarship—\$450
Tanya Spinner, University of North Dakota
- Ruth Peterson Memorial Scholarship of the Pi Theta Epsilon Kappa Chapter —\$375
Kristi Krull, University of North Dakota

Associate Degree Study

- Carlotta Welles Scholarship—\$500
Julie Gallegos, Pueblo Community College

State Occupational Therapy Association Scholarships Administered by AOTF

- ARIZONA Occupational Therapy Association
The Adelaide Ryerson Smith Memorial Scholarships—\$350 ea
Christine Everaert, Arizona School of Health Sciences
Stephanie Schumacher, Arizona School of Health Sciences
- ARKANSAS Occupational Therapy Association
The Florence Wood Scholarship—\$500
Anna Schulte, University of Central Arkansas
- MASSACHUSETTS Occupational Therapy Association
The Karen Jacobs Scholarship—\$500
Vivian Duprey, Tufts University

- NEW YORK Occupational Therapy Association Scholarships—\$1000 each
Catherine Hutchinson, Dominican College
Amanda Lynch, Ithaca College
- NORTH CAROLINA Occupational Therapy Association Scholarship—\$750
Marsha Mendenhall, Winston-Salem State University
- OHIO Occupational Therapy Association Scholarship—\$850
Amber Kotz, University of Findley
- PENNSYLVANIA Occupational Therapy Association Scholarship—\$500
Lindsey Wilkes, Duquesne University
- SOUTH CAROLINA Occupational Therapy Association Chris Ebbers Scholarship—\$250
Courtney Schuler, University of South Carolina
- TEXAS Occupational Therapy Association Scholarships—\$1000 each
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Tamara Renaud, University of Texas Medical Branch
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John Ehlers, University of Puget Sound
- WEST VIRGINIA Occupational Therapy Association The Charlotte Prudich Scholarship—\$600
Darrick Blankenship, West Virginia University
- WISCONSIN Occupational Therapy Association Scholarship—\$1000
Jenny Allard, Concordia University, Wisconsin



Securing the Future . . .

The Board of Directors and staff express sincere appreciation to those who supported the Foundation during the 2001 fiscal year, including the 41,000 AOTA members who contribute to AOTF through their annual AOTA membership dues. Tax-deductible donations and in-kind gifts enable AOTF to expand its efforts to create new opportunities for research and education.

We invite you to join the Foundation's family of donors. You may make a donation using the secure contribution form available through the AOTF website at: www.aotf.org. Or, you may contact AOTF directly at 301.652.6611, Extension 2556.

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Stewardship and Accountability Fiscal Year 2001

AOTF closed the fiscal year on September 30, 2001 amid financial turbulence. Net assets at the close of FY 2000–2001 were \$10,820,400 as compared with \$11,945,535 at the close of the prior year. The tragic events of September 11th had a significant impact on the value of the Foundation's investments at the close of the fiscal year. The decline in net assets is attributable in large measure to realized and unrealized losses on marketable securities held in the Foundation's investment portfolio, as well as in split interest/irrevocable trusts managed by other institutions on behalf of AOTF.

Revenue for the year was \$715,620, including \$111,320 from AOTA 2% transfers. Programmatic and operating expenses were \$1,159,583. Total losses on marketable securities were \$681,172 resulting in a decline in net assets for FY 2000-2001 of \$1,125,135.

In FY 2000–2001 the Foundation incurred expenses in the following programmatic categories:

PROGRAM EXPENSES

Research	\$ 293,776
Education	344,797
Scholarships	32,690
	671,263

SUPPORT SERVICES

Administration and general	313,358
Marketing and development	174,962
	488,320
	\$ 1,159,583

The following Balance Sheet is an excerpt from the unqualified, external audit of the AOTF Financial Statements for FY 2000-2001 performed by Bond Beebe Certified Public Accountants. AOTF is in full compliance with accounting methods and standards for nonprofit organizations. Copies of the complete audit report may be obtained by writing to AOTF at 4720 Montgomery Lane, P.O. Box 31220, Bethesda, Maryland 20824-1220.

ASSETS		
	2001	2000
CURRENT ASSETS		
Cash and cash equivalents	\$ 304,282	\$ 138,034
Contributions receivable	49,975	171,551
Pamphlets and pins	172	2,710
Other receivables and prepaid expenses	2,178	443
	356,607	312,738
MARKETABLE SECURITIES		
U.S. government securities	51,625	50,250
Corporate bonds	409,753	428,319
Common stocks	1,134,720	1,871,017
Unit investment trusts	-	5,416
	1,596,098	2,355,002
SPLIT-INTEREST GIFTS		
Pooled income fund	101,798	99,341
Charitable remainder unitrust	835,114	1,067,537
Charitable remainder trusts	8,441,089	8,622,494
	9,378,001	9,789,372
FIXED ASSETS		
Net of accumulated depreciation of \$63,134 and \$55,612	23,829	16,002
OTHER ASSETS		
Contributions receivable	73,779	187,869
Cash surrender value of life insurance (net of related policy loans of \$219,640 and \$210,139)	45,612	36,836
Due from affiliate—research contract	-	23,471
	119,391	248,176
TOTAL ASSETS	\$ 11,473,926	\$ 12,721,290
LIABILITIES AND NET ASSETS		
LIABILITIES		
Accounts payable and accrued expenses	\$ 40,876	\$ 38,903
Due to affiliate	139,935	185,227
Liability under unitrust agreement	317,256	343,434
Liability for future interest in pooled income fund	30,567	30,563
Line of credit	-	58,400
Deferred compensation	113,030	98,875
Other	11,862	20,353
	653,526	775,755
NET ASSETS		
Unrestricted	(147,666)	682,245
Temporarily restricted	1,229,591	1,343,410
Permanently restricted	9,738,475	9,919,880
	10,820,400	11,945,535
TOTAL LIABILITIES AND NET ASSETS	\$ 11,473,926	\$ 12,721,290



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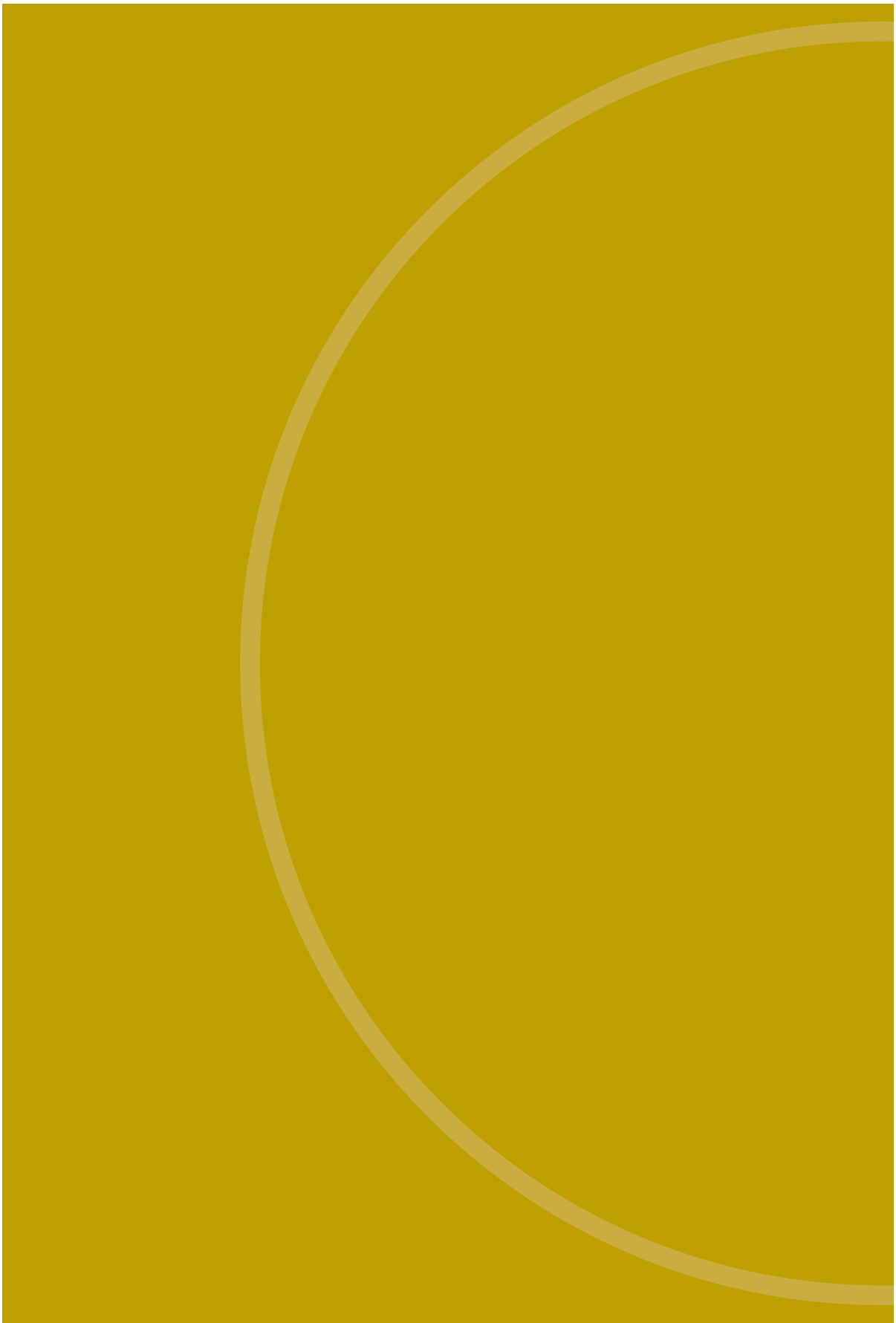
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