



# **The American Occupational Therapy Foundation**

## ***Creating Opportunities Through Research and Education***

### **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](http://www.aotf.org) to learn more about the services and programs the Foundation offers on behalf of the profession.

## President's Message



Like many non-profit organizations, the American Occupational Therapy Foundation was challenged in 2002 to exercise effective stewardship over its assets, both human and fiscal. Despite this challenge, 2002 was a dynamic and productive year for the Foundation. To alleviate the effects of a lagging investment environment, AOTF employed cost-containment strategies and technological innovations that enabled us to move forward with an impressive stream of programs to advance occupational therapy education and research.

In 2002, AOTF continued to fund the Center for Outcomes Research and Education at the University of Illinois at Chicago. CORE staff and research fellows leveraged the Foundation's investment to acquire \$16 million in external grants for outcomes research in occupational therapy. These studies will yield scientific evidence upon which to base practice of the highest quality.

Working with the Accreditation Council for Occupational Therapy Education, AOTF promoted the development of faculty to fulfill the profession's mandate for professional entry at the post-baccalaureate level. To accomplish this goal, AOTF offered consultation in graduate curriculum design to integrate creative models for fieldwork education and innovative teaching methods.

The Foundation's Task Force on Occupation in Societal Crises broadened its focus in 2002 to collaborate in writing a concept paper with the American Occupational Therapy Association's Commission on Practice. This paper will

document the role occupational therapy practitioners play in planning for, and responding to, emergencies within their communities.

The Foundation attributes its progress to the more than 40,000 donors, including the membership of AOTA, who contributed to AOTF in 2002. The contributions of our colleagues affirm the Foundation's achievements and activities on behalf of the profession.

The AOTF Board of Directors joins me in thanking each of you for your generosity in helping AOTF promote a bright future for the profession. With your continued support, the Foundation will realize its vision of a society in which individuals, regardless of age or ability, may participate in occupations of their choice. Thank you for your part in helping to make 2002 another banner year for AOTF.

With great appreciation,

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

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



# The AOTF Institute for the Study of Occupation and Health

## ***Exploring the Relationship between Occupation and Health***

The Institute for the Study of Occupation and Health continues 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 . . .**

***OTJR: Occupation, Participation and Health***, in its second year with its new focus on human occupation, reflects the Foundation's commitment to excellence in scholarship in the profession. Under the stewardship of editor, Carolyn Baum, the journal attracts manuscripts from international scholars within the profession as well as other disciplines.

**The Wilma L. West Library** is the primary repository for literature and other resources concerning the education, theory, and practice of occupational therapy. The library staff acquires, organizes, and preserves the collection and provides services to support the occupational therapy community, other health care professionals, and consumers. During 2002, staff filled over 2,100 requests and shared its collection through interlibrary loans with over ninety libraries across the United States, Canada, and the United Kingdom.

**OT SEARCH** is the profession's largest and most comprehensive on-line database. It is jointly sponsored by AOTF and AOTA. Educators, researchers, students, and practitioners who subscribe to OT Search have access to over

34,000 citations including contemporary publications, dissertations and theses, and archival resources.

**AOTF Resource Notes** emphasize and interpret the role occupation and occupational therapy play in understanding and coping with the impact of contemporary issues and problems. Distributed biweekly to over 1,100 email subscribers, the AOTF Resource Notes are drawn from up-to-date print and electronic sources. Subscribers also receive “This ‘n That,” a discussion of one resource in depth, such as a specific article, book, or website. AOTF Resource Notes are provided by AOTF as a service to the profession and may be found on the Foundation’s website: [www.aotf.org](http://www.aotf.org).

## Advancing Practice . . .

**The Task Force on Occupation in Societal Crises** was created by AOTF after September 11, 2001 to foster the inclusion of occupational therapy practitioners as providers of interventions during societal crises. In 2002, the Task Force worked to create a network of occupational therapy practitioners positioned to respond to emergencies in their communities. AOTF is collaborating with AOTA in establishing this network and creating a spectrum of resources that document occupational therapy’s role in societal crises.

**The Center for Outcomes Research and Education at the University of Illinois at Chicago** continues its documentation of the effectiveness of occupational therapy intervention. Growing the initial investment of AOTA and AOTF, CORE fellows have acquired \$16 million in external funding to finance over 30 new studies. These studies document the contribution of occupational therapy in areas such as: promoting participation for individuals with Chronic Fatigue Syndrome, assessing barriers to work for persons with AIDS, and assessing environmental modifications and assistive technologies in enabling community living.

## Supporting Education . . .

**The Regional Education Workshop Series**, administered by AOTF, concluded in 2002. The workshops were designed by AOTF, AOTA, and ACOTE to facilitate the transition to post-baccalaureate entry to the profession. Twenty-three schools, assisted by eight facilitators, participated in this valuable training process designed to enhance the strengths of the individual educational program.

**The Doctoral Network** has grown to 665 occupational therapy practitioners, all of whom are currently pursuing, or have already completed their doctoral education. In addition to maintaining a web-based membership directory, AOTF sponsors educational and networking opportunities for Doctoral Network members during the AOTA annual conference.

**AOTF scholarships** awarded in 2002

### Master's Degree Study

- Carolyn Kohn Memorial Scholarship—\$2000  
Uri Lahav-Goldshmid, New York University
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- Kappa Delta Phi Scholarships—\$2000  
Sunayna Agrawal, University of Southern California
- Kappa Delta Phi Scholarships—\$1000 each  
Kimberly Hannon, Washington University School of Medicine  
Jennifer Kluge, Florida International University  
Susanna Samuel, Rockhurst University
- AOTF General Scholarship—\$1000  
Kimberly Reed, University of Puget Sound
- Janice McGraw Scholarship—\$1000  
Lauren Ashurst, University of North Carolina

## Baccalaureate Degree Study

- Assembly of Student Delegates Scholarship, formerly ASCOTA—\$450  
Lori Mutti, American International College

## Associate Degree Study

- Carlotta Welles Scholarship—\$500  
Annie Makinson, Greenville Technical College

## State Occupational Therapy Association Scholarships Administered by AOTF

- DISTRICT OF COLUMBIA Occupational Therapy Association—\$500  
Farah Antoine, Howard University
- KENTUCKY Occupational Therapy Association  
Jean Steffan Smith Memorial Scholarship—\$500  
Julia Rust, Eastern Kentucky University
- NEW MEXICO Occupational Therapy Association  
Julia D. Sweeney Scholarship—\$500  
Rebecca Starrett, University of New Mexico
- NORTH CAROLINA Occupational Therapy Association—\$300  
Rebecca Iverson, East Carolina University
- OHIO Occupational Therapy Association—\$850 each  
Alysun Brown, Medical College of Ohio  
Anna Maust, University of Findlay
- SOUTH CAROLINA Occupational Therapy Association  
Chris Ebbers Scholarship—\$500  
Valerie Presley, Greenville Technical College



- TEXAS Occupational Therapy Association—\$1,000 each  
Christa Adams, Texas Woman's University  
Laura Perez, University of Texas at El Paso
- UTAH Occupational Therapy Association—\$250  
Kristina Ward, Salt Lake Community College
- WEST VIRGINIA Occupational Therapy Association  
The Charlotte Prudich Scholarship—\$600.00  
Jo-Clair Michael, West Virginia University



# Securing the Future . . .

The Board of Directors and staff express sincere appreciation to those who supported the Foundation during the 2002 fiscal year, including the 40,000 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](http://www.aotf.org). Or, you may contact AOTF directly at 301 652-6611, Extension 2556.

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|                     |                    |                   |
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*It is our intention to recognize all fiscal year 2002 donors in this listing. If we have inadvertently omitted your name or placed you in an incorrect giving category, please call AOTF at 301-652-6611, Extension 2556.*



# Stewardship and Accountability

## Fiscal Year 2002

AOTF closed the fiscal year on September 30, 2002. Net assets at the close of FY 2001-2002 were \$9,910,104 as compared with \$10,820,400 at the close of the prior year. The decline in net assets is attributable 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 \$805,959 including \$108,235 from AOTA 2% transfers representing AOTA members' contributions. Programmatic and operating expenses were \$919,734. Total losses on marketable securities were \$796,521 resulting in net assets for FY 2001-2002 of \$910,296.

In FY 2001-2002, the Foundation incurred expenses in the following programmatic categories.

|                            | <b>2002</b>       |
|----------------------------|-------------------|
| <b>PROGRAM EXPENSES</b>    |                   |
| Research                   | \$ 184,766        |
| Education                  | 255,443           |
| Scholarships               | 24,100            |
|                            | <b>464,309</b>    |
| <b>SUPPORT SERVICES</b>    |                   |
| Administration and general | 261,069           |
| Marketing and development  | 194,356           |
|                            | <b>455,425</b>    |
|                            | <b>\$ 919,734</b> |

The following Balance Sheet is an excerpt from the unqualified, external audit of the AOTF Financial Statements for FY2001-2002 performed by Bond Beebe Certified Public Accountants. AOTF is in full compliance with accounting methods and standards for non-profit 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.

| <b>ASSETS</b>                                                                                       |                      |                      |
|-----------------------------------------------------------------------------------------------------|----------------------|----------------------|
|                                                                                                     | <b>2002</b>          | <b>2001</b>          |
| <b>CURRENT ASSETS</b>                                                                               |                      |                      |
| Cash and cash equivalents                                                                           | \$ 360,188           | \$ 304,282           |
| Contributions receivable                                                                            | 48,230               | 49,975               |
| Pamphlets and pins                                                                                  | 4,133                | 172                  |
| Other receivables and prepaid expenses                                                              | 7,368                | 2,178                |
|                                                                                                     | <b>419,919</b>       | <b>356,607</b>       |
| <b>MARKETABLE SECURITIES</b>                                                                        |                      |                      |
| U.S. government securities                                                                          | -                    | 51,625               |
| Corporate bonds                                                                                     | 429,434              | 409,753              |
| Common stocks                                                                                       | 853,482              | 1,134,720            |
|                                                                                                     | <b>1,282,916</b>     | <b>1,596,098</b>     |
| <b>SPLIT-INTEREST GIFTS</b>                                                                         |                      |                      |
| Pooled income fund                                                                                  | 102,527              | 101,798              |
| Charitable remainder unitrust                                                                       | 647,609              | 835,114              |
| Charitable remainder trusts                                                                         | 7,966,018            | 8,441,089            |
|                                                                                                     | <b>8,716,154</b>     | <b>9,378,001</b>     |
| <b>FIXED ASSETS</b>                                                                                 |                      |                      |
| Net of accumulated depreciation<br>of \$69,626 and \$63,134                                         | <b>16,423</b>        | <b>23,829</b>        |
| <b>OTHER ASSETS</b>                                                                                 |                      |                      |
| Contributions receivable                                                                            | 21,306               | 73,779               |
| Cash surrender value of life insurance (net of<br>related policy loans of \$239,106 and \$ 219,640) | 29,567               | 45,612               |
|                                                                                                     | <b>50,873</b>        | <b>119,391</b>       |
| <b>TOTAL ASSETS</b>                                                                                 | <b>\$ 10,486,285</b> | <b>\$11,473,926</b>  |
| <b>LIABILITIES AND NET ASSETS</b>                                                                   |                      |                      |
| <b>LIABILITIES</b>                                                                                  |                      |                      |
| Accounts payable and accrued expenses                                                               | \$ 30,477            | \$ 40,876            |
| Due to affiliate                                                                                    | 101,451              | 139,935              |
| Liability under unitrust agreement                                                                  | 297,236              | 317,256              |
| Liability for future interest in pooled income fund                                                 | 29,465               | 30,567               |
| Deferred compensation                                                                               | 117,552              | 113,030              |
| Other                                                                                               | -                    | 11,862               |
|                                                                                                     | <b>576,181</b>       | <b>653,526</b>       |
| <b>NET ASSETS</b>                                                                                   |                      |                      |
| Unrestricted                                                                                        | (465,767)            | (147,666)            |
| Temporarily restricted                                                                              | 1,112,467            | 1,229,591            |
| Permanently restricted                                                                              | 9,263,404            | 9,738,475            |
|                                                                                                     | <b>9,910,104</b>     | <b>10,820,400</b>    |
| <b>TOTAL LIABILITIES AND NET ASSETS</b>                                                             | <b>\$ 10,486,285</b> | <b>\$ 11,473,926</b> |



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