

AOTF

connection

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THE AMERICAN OCCUPATIONAL THERAPY FOUNDATION ■ Vol. 11, No. 2 Special Edition

annual report 2003

Message from the President

On behalf of the Board of Directors of the American Occupational Therapy Foundation, I am immensely proud to share with you highlights of the Foundation's activities during the past year. Your generous financial support is integral to the success of AOTF's initiatives towards furthering our vision of a society in which individuals, regardless of age or ability, may participate in occupations of their choice.

A strong spirit of collaboration guided much of our work this year. One example of this is our upcoming Evidence-Based Practice Conference planned and implemented in conjunction with AOTA.

In 2003, the Foundation launched a yearlong Strategic Planning Process. During the coming year, the Foundation will seek the opinions of our donors and AOTA members about the future work of AOTF on behalf of the profession. We will collaborate with our professional partners to explore our common interests and ways in which we can work in concert to advance the profession.

Also in 2003, AOTF formed a new Corporate Leadership Committee comprised of senior executives from the retail, product development, insurance, and service industries to assist in creating corporate allies. Our goal is to attract additional funding for education and research and broaden awareness of occupational therapy within the business community.

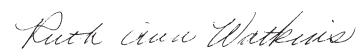
AOTF relies exclusively on financial support from AOTA members, grants, and donations from individuals and corporations. Leveraging resources to aim high keeps our commitment strong and impels AOTF to produce measurable and relevant results.

The strengths, talents, knowledge, and experience of volunteers and the AOTF staff allow us to gain the maxi-

mum benefit from every dollar. We are extremely fortunate to have 35,000 donors, including AOTA members, as our supporters. We consider every donor a partner in meeting the challenges of the Foundation, particularly as we face the lingering effects of a depressed economy.

We hope that you share our sense of pride in the American Occupational Therapy Foundation's accomplishments in 2003. Thank you for your role in making them possible.

With great appreciation,



Ruth Ann Watkins, *President*



Leveraging Dollars to Benefit Society . . .

Chartered in 1965 as an independent 501(c)(3) non-profit organization, the American Occupational Therapy Foundation actively solicits tax-deductible contributions to advance occupational therapy education and research. AOTF invests in programs of national and international significance that amass intellectual capital to promote excellence in occupational therapy and ensure that people, regardless of their age or ability, may participate in the occupations that bring meaning to their lives and foster health and well-being.

Occupational therapy affords cost-effective means for mitigating significant societal issues such as aging in place, the effects of chronic disabling conditions on children and adults, and the effects of serious mental illness on families and communities.

AOTF connection

Published by the
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AOTF Program Investments

The Institute for the Study of Occupation and Health is the umbrella through which the Foundation documents the effectiveness of occupational therapy practice, supports education and disseminates information about the relationship between occupation and health.

Advancing Occupational Therapy Practice . . .

The International Conference on Evidence-Based Practice, the first of its kind for occupational therapy, is the result of a grant initiated by AOTF and AOTA and funded by the Agency for Healthcare Research and Quality. This Conference marks the beginning of an international collaboration to unify and strengthen practice in occupational therapy. Occupational therapists from 12 countries have been invited to address the challenge of organizing and sharing evidence that supports occupational therapy of the highest quality. They will design a model for reviewing the relevant literature and propose ways to make evidence readily accessible. They will also recommend content and procedures for educational materials to promote the use of evidence in delivering quality practice.

The Center for Outcomes Research and Education at the University of Illinois at Chicago leveraged a seed grant of \$300,000 into more than \$18 million in external funding to stimulate research. The 28 studies currently underway contribute to the understanding of the effectiveness of occupational therapy across the spectra of disability and age. This investment provides knowledge about barriers to social participation and the role occupational therapy plays in promoting participation at school, home, work, and within recreational environments.

Habits and their Connection to Health is an investment in innovation that may reduce health risks such as obesity, smoking, substance abuse and cultural and societal patterns that disenfranchise the elderly and people with disabilities. Habits may either promote and sustain, or be detrimental to, one's health and participation in society. The third in this series of interdisciplinary conferences is being planned for 2005 and will stimulate research about habits and learning across the life span.

The Task Force on Occupation in Societal Crises aims to establish a network of occupational therapy practitioners who are qualified as early responders in times of natural and man-made crises for persons with disabilities and the elderly. AOTF is collaborating with the AOTA Commission on Practice to finalize a concept paper for occupational therapy practitioners regarding issues and opportunities for crisis intervention in their communities.

Disseminating Information . . .

OTJR: Occupation, Participation and Health is an internationally recognized journal highly regarded as a medium for interdisciplinary dialogue. Under the stewardship of Editor, Carolyn Baum, the Journal was refocused to disseminate knowledge about the role occupation plays in fostering participation and enhancing the health of individuals and society.

The Wilma L. West Library has global reach and influence. The library houses a comprehensive collection of professional literature and documents. It is the premier source of information about the effects of occupation and occupational therapy on health. During 2003, staff filled over 1,500 requests and shared its collection through interlibrary loans with over

70 libraries across the United States, Canada, and the United Kingdom.

OT SEARCH is the profession's largest and most comprehensive online database and is jointly sponsored by AOTF and AOTA. Educators, researchers, students, and practitioners who subscribe to OT SEARCH have access to over 38,000 citations including contemporary publications, dissertations and theses, and archival resources.

AOTF Resource Notes are available on the AOTF website and distributed biweekly to over 1,300 email subscribers. The Notes address contemporary issues and social problems drawn from the popular media and are excellent resources for education and practice. They include an extensive bibliography and an interpretation of the mitigating influence of occupation and occupational therapy towards health and well-being.

Supporting Education . . .

Tools for Practice, Education and Research offered by AOTF include Colloquia, Poster Sessions, Workshops, and Institutes at the AOTA annual conference. These programs showcase current research, provide mentoring, and offer opportunities for continuing education.

Faculty Development, a high-priority for AOTF, provides consultation and tutorials in curriculum design, academic leadership, teaching evidence-based practice, and offering innovative fieldwork design.

The Doctoral Network supports over 700 occupational therapy practitioners who are currently pursuing, or have completed their doctoral education. AOTF maintains a web-based membership directory and sponsors a speaker and networking opportunities for Doctoral Network members at the AOTA annual conference.

Scholarships are awarded each year to students in accredited occupational therapy programs in the United States.

Funds from the AOTF Endowment, corporate gifts, the Association of Student Delegates, state occupational therapy associations, and Kappa Delta Phi Sorority make these scholarships possible. AOTF congratulates the following recipients of scholarships awarded in 2003.

2003 Scholarship Recipients

DOCTORAL DEGREE IN OCCUPATIONAL THERAPY

North Coast Medical Scholarship—\$5,000

- Marcella McGee
Creighton University

MASTER'S DEGREE IN OCCUPATIONAL THERAPY

North Coast Medical Scholarship—\$5,000

- Joanna Spangenberg
San Jose State University

Carolyn Kohn Memorial Scholarship—\$2,000

- Stacey Markham
New York University

Willard and Spackman Memorial Scholarship—\$2,000

- Mary Overman
Virginia Commonwealth
University

Kappa Delta Phi Scholarships—\$2,000 each

- Erica Ahlgren
St. Ambrose University
- Julie Bezold
University of Tennessee

Janice McGraw Memorial Scholarship—\$1,000

- Beth Martin
Belmont University

Assembly of Student Delegates Scholarship, formerly ASCOTA—\$450

- Briana Rusiski
University of Pittsburgh

ASSOCIATE DEGREE IN OCCUPATIONAL THERAPY

Carlotta Welles Scholarship—\$500

- Emily Simpson
Cabarrus College of Health
Sciences

Kappa Delta Phi Scholarships—\$500 each

- Cynthia Griffith
Lake Michigan College
- Luz Rodriguez
LaGuardia Community College

STATE OCCUPATIONAL THERAPY ASSOCIATION SCHOLARSHIPS

Arizona Occupational Therapy Association—\$1,000

Master's Degree in Occupational Therapy

- Sara Treanor
Midwestern University

The Florence Wood Scholarship of the Arkansas Occupational Therapy Association—\$500

Master's Degree in Occupational Therapy

- Kelley Lewis
University of Central Arkansas

Kansas Occupational Therapy Association—\$500 each

Master's Degree in Occupational Therapy

- Alyson Pleviak
University of Kansas Medical
Center

*Baccalaureate Degree in Occupational
Therapy*

- Sarah Johnston
Newman University

The Jean Steffan Smith Memorial Scholarship of the Kentucky Occupational Therapy Association—\$500

Baccalaureate Degree in Occupational Therapy

- Julia Rust-Jones
Eastern Kentucky University

The Karen Jacobs Scholarship of the Massachusetts Occupational Therapy Association—\$500

Master's Degree in Occupational Therapy

- Gabrielle Gaudreau
The Boston School of Occupational Therapy—Tufts University

Michigan Occupational Therapy Association—\$500

Baccalaureate Degree in Occupational Therapy

- Megan Anderson
Western Michigan University

The Mary Eileen Dixie Scholarship of the New Hampshire Occupational Therapy Association—\$2,000

Master's Degree in Occupational Therapy

- Meaghan Reilly
University of New Hampshire

The Julia D. Sweeney Scholarship of the New Mexico Occupational Therapy Association—\$500

Master's Degree in Occupational Therapy

- Nancy Rawcliffe
University of New Mexico

New York Occupational Therapy Association—\$1,000 each

Master's Degree in Occupational Therapy

- Judith Lapidus
Columbia University
- Rozi Weinberg
Touro College

Baccalaureate Degree in Occupational Therapy

- Leslie Meistrich
Keuka College

North Carolina Occupational Therapy Association—\$300

Master's Degree in Occupational Therapy

- Rebecca Iverson,
University of North Carolina at Chapel Hill

Ohio Occupational Therapy Association—\$1,000

Master's Degree in Occupational Therapy

- Lori Dallacheisa
University of Findlay

Oklahoma Occupational Therapy Association—\$500

Master's Degree in Occupational Therapy

- Callie Acree
University of Oklahoma Health Sciences Center

Oregon Occupational Therapy Association \$500

Associate Degree in Occupational Therapy

- Donna Remmick
Mount Hood Community College

The Reba M. Sebelist Scholarship of the Pennsylvania Occupational Therapy Association—\$500

Baccalaureate Degree in Occupational Therapy

- Alisha Kowalecki
Duquesne University

Rhode Island Occupational Therapy Association—\$1,000

Associate Degree in Occupational Therapy

- Courtney Crone
New England Institute of Technology

Texas Occupational Therapy Association—\$1,000

Master's Degree in Occupational Therapy

- Leyla Hedayati
Texas Woman's University

Utah Occupational Therapy Association—\$350

Master's Degree in Occupational Therapy

- Amy Nielsen
University of Utah

The Charlotte Prudich Scholarship of the West Virginia Occupational Therapy Association—\$600

Master's Degree in Occupational Therapy

- Diana Carter
West Virginia University

Securing the Future

The Board of Directors and staff thank those who generously supported AOTF during the 2003 fiscal year, including the 35,000 members of AOTA who contributed to the Foundation through their annual membership dues. Tax-deductible donations and in-kind gifts enable AOTF to advance practice, support education and disseminate information about the relationship between occupation and health.

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Joanne Milou	Ann Sacks	Tracy Young	Gina Capone	Foster	Robert Henderson	Yevgeniya Lev	Gayle Pinshaw
Margaret Mitani	Kazuko Saruwatari	Maxine Zinder	Joyce Carmouche	Sena Felt	Anne Henne	Gloria Levin	Diane Levitus
Douglas Mitchell	Elizabeth Adamitis		Sharon Carter	Jennifer Ferguson	Marion Henry	Eugenia Lew	Gail Liberg
Tamako Miyamae	Gretchen Schmalz		Christine Cayo	Helen Fitts	Susan Hepler	David Livingston	Nancy Lockenour
Cheryl Model	DeAnne Schmunk		Sharon Cermak	Francine Fleishman	Jim Hermeling	Gayle Hersch	Ingrid Loney
Kathleen Monahan	Jessica Alden		Jacquelyn Chamberlin	Paul Fontana	Sarah Hertzberg-Spiller	Sarah Hertzberg-Spiller	Peggy Lounsbury
Monahan	Susan Alexander		Patrice Chambers	Ingrid Franc	Mary Herzog	Virginia Hoagland	Susan Lowrey-Flaherty
Galen Moore	Rosalyn Aligada		Christine Chen	Elizabeth Francis-Connolly	Gail Hills	Constance Holderman	Kathleen Maginn
Arlyne Moran	Eleanor Alperston		Denise Chisholm	Miriam Freeling	Virginia Hoagland	Karen Macdonald	
Carol Morgan	Alice Seidel		Maria Chiulli		Constance Holderman	Amy Mach	
Roderick Morgan	Kathleen Self		Lorna Christenson		Karen Holliman	Kathleen Maginn	
Jane Murphy	Rekha Shah						
	Shirley Shaw						
		\$25-\$49					
		Elizabeth					
		Adamitis					
		Elizabeth Adrian					
		Patricia Alagna					
		Jessica Alden					
		Susan Alexander					
		Rosalyn Aligada					
		Eleanor Alperston					
		Alice Seidel					
		Robinette Amaker					
		Sabrina Ambtman					
		Lori Andersen					
		Lauren Argento					

Stephanie Proctor-Tollison	Crystal Seals	Leslie Turner
Sandra Purvis	Dalida Shabsigh	Yvonne Turner
Cordelia Puttkammer	Brooke Sherman	Heeyeon Ui
Joan Quinn	Patricia Shiokari	A. Umbarger
Marie Quirion	Darlene Shively	Anjali Upadhye
Marcea Raffel	Linda Silver	Nancy Van Slyke
Mary Raley	Madelyn Silverman	Ellyn Varela-Burstein
Katherine Rammel	Joan Simmons	Paula Vargo-Naudziunas
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Michele Riak	Dawn Skiles	Margarita Vileno Sosa
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Jayne Rich	Nancy Smith	June Villeco
Judith Riekert	Theresa Smith	Mirna Villeda
Linda Rifkin	Yda Smith	Thelma Wakefield
Susan Rittenberg	Susanne Smith-Roley	Jahneen Wallen
Frances Rizzo	Patricia Spear	Amy Walsh
Mary Robinson	Kathryn Splinter-Watkins	James Watson
Virginia Rodner	Darlene St.	Janet Watts
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Julia Rossi	Tanya Steen	Jaclyn West-Frasier
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Joyce Sabari	Allison Taylor	Cynthia Wise
Maryann Sacco-Peterson	Cheryl Taylor	Carol Wohlers
Marcelle Salamy	Cynthia Taylor	Ka Ngan Wong
Grace Sanchez	Maryann Taylor	Alma Woods
Bettie Sarrafian	Beverly Thorn	Ruthanne Worden
Deanna Sava	Joyce Titus	Cheryl Wynne Anderson
Linda Savino	Christina Torczon	Yuriko Yasuda
Vivien Sayre	Barbara Tourkellott	Susan Young
Carol Scheerer	Theresa Tovey	Lawrence Zachow
Felicia Schiller	Marian Townsend	Debra Ziegler
Erika Schnelle	Sally Townsend	Tracy Zinser-Bourne
Christina Schoder	The-Linh Tran	
Winifred Schultz-Krohn	Janet Tredwell	
Sharan Schwartzberg	Kelli Tretter	
	Willinda Truitt-Brown	

It is our intention to recognize all fiscal year 2003 donors of \$25 and over 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 2552.

■ *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, ext. 2552.*

Stewardship and Accountability Fiscal Year 2003

AOTF closed the fiscal year on September 30, 2003. Net assets at the close of FY 2002–2003 were \$9,853,273 as compared with \$10,486,285 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 \$188,007 including \$108,154 from AOTA 2% transfers representing AOTA members' contributions. Programmatic and operating expenses were \$651,136. Total losses on marketable securities were \$855,352 resulting in a decline in net assets for FY 2002–2003 of \$633,012.

In FY 2002–2003, the Foundation incurred expenses in the following programmatic categories.

Program Expenses

Research	\$ 81,403
Education	256,201
Scholarships	36,250
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	373,854

Support Services

Administration and General	306,182
Marketing and Development	210,883
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	517,065

TOTAL	\$ 890,919
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CORPORATE LEADERSHIP COMMITTEE

Chairman, Don Lang, AOTF Board Member

John Bardi, Director Neuroscience Advocacy and Policy Development Bristol-Myers Squibb	Mori MacKenzie, Executive Vice President CHICO'S
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Ed Eckenhoff, President and CEO National Rehabilitation Hospital	Pattie Moore, President Moore Design Associates
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Karen Jacobs, Associate Professor Boston University	Dan Ryan, President and CE BCS Financial Corporation
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Sharon Ryan, AOTF Board Member

ASSETS

	2003	2002
CURRENT ASSETS		
Cash and cash equivalents	\$ 282,982	\$ 360,188
Contributions receivable	246,299	48,230
Pamphlets and pins	2,725	4,133
Other receivables and prepaid expenses	29,643	7,368
	561,649	419,919
MARKETABLE SECURITIES		
Corporate bonds	396,374	429,434
Common stocks	1,023,974	853,482
	1,420,348	1,282,916
SPLIT-INTEREST GIFTS		
Pooled income fund	101,717	102,527
Charitable remainder unitrust	760,788	647,609
Charitable remainder trusts	6,975,515	7,966,018
	7,838,020	8,716,154
FIXED ASSETS		
“Net of accumulated depreciation of \$75,558 and \$69,626”	9,633	16,423
OTHER ASSETS		
Contributions receivable	1,500	21,306
Cash surrender value of life insurance (net of related policy loans” of \$239,106 and \$219,640)”	22,123	29,567
	23,623	50,873
TOTAL ASSETS	9,853,273	10,486,285

LIABILITIES AND NET ASSETS

LIABILITIES		
Accounts payable and accrued expenses	26,799	30,477
Due to affiliate	1,972	101,451
Liability under unitrust agreement	275,263	297,236
Liability for future interest in pooled income fund	28,795	29,465
Deferred compensation	122,250	117,552
Other	191,000	0
	646,079	576,181
NET ASSETS		
Unrestricted	(206,101)	(465,767)
Temporarily restricted	1,140,879	1,112,467
Permanently restricted	8,272,901	9,263,404
	9,207,192	9,910,104
TOTAL LIABILITIES AND NET ASSETS	\$ 9,853,273	\$ 10,486,285

Copies of the complete audit report prepared by Bond Beebe Certified Public Accountants may be obtained by writing to AOTF at 4720 Montgomery Lane, P.O. Box 31220, Bethesda, Maryland 20824-1220.