

The background of the cover is split horizontally into two colors: a gold upper half and a dark blue lower half. Overlaid on this background are several thin, white-outlined circles of varying sizes that overlap each other, creating a geometric pattern.

**2007**

# ANNUAL REPORT

**THE AMERICAN OCCUPATIONAL THERAPY FOUNDATION**

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### **of Occupation and**

### **Health**

Jeffrey S. Reznick

\* deceased

# American Occupational Therapy Foundation (AOTF) President's Letter to Our Stakeholders

Stewardship can be viewed as the assumption of responsibility for the welfare of society and the careful and responsible management of something entrusted to one's care. Stewardship has been the guiding principle of the AOTF since its inception.

This report accounts for the gifts of time, resources, money, and talent given to us by our stakeholders to advance the profession of occupational therapy and enhance its ability to serve society. The report covers the fiscal year October 1, 2006 to September 30, 2007; a year of significant transition and accomplishment.

During this period, in anticipation of the retirement of three senior staff who represented an extraordinary eighty combined years of service to the AOTF, four Board members who otherwise would have retired agreed to extend their terms by one year in order to assure continuity of Board governance. During that time, Mary Binderman, Nedra Gillette, and Martha Kirkland thoroughly oriented and mentored Mindy A. Hecker, MBA, MLS, the new Director of Information Resources and the Wilma L. West Library and Jeffrey S. Reznick, PhD, the new Director of the Institute for the Study of Occupation and Health. In June of 2007, Ms. Hecker and Dr. Reznick became interim Co-Executive Directors while the AOTF Board undertook its search for a new Executive Director to lead AOTF into the future.



## **AOTF Mission**

*Through the use of its fiscal and human resources, AOTF expands and refines the body of knowledge of occupational therapy and promotes understanding of the value of occupation in the interests of the public good.*

Adopted November 2004.

Much was accomplished in relation to the mission of the AOTF during this period of transition. New possibilities from the best of the past were used to create programs and initiatives for the future. Collaboration and partnerships were powerful ways of accomplishing multiple goals. Through collaboration with our professional partners the American Occupational Therapy Association (AOTA) and National Board for Certification in Occupational Therapy (NBCOT), we shared the effort to position the profession for the greater benefit of society in the years ahead as articulated in the AOTA Centennial Vision.

The financial assets increased by \$650,000 as a result of increases in returns from investments and donations, including the 2% of AOTA membership dues that supports the operations of the Foundation enabling an increase in programming and scholarships given during this time period. The report that follows highlights the accomplishments of the year.

On behalf of the Board and the staff of AOTF we thank you, our stakeholders, for your generosity and your partnership in our shared commitment to the profession and society. We value your trust in our stewardship and we promise to uphold the values that underpin our profession as we work together for the benefit of current and future generations.

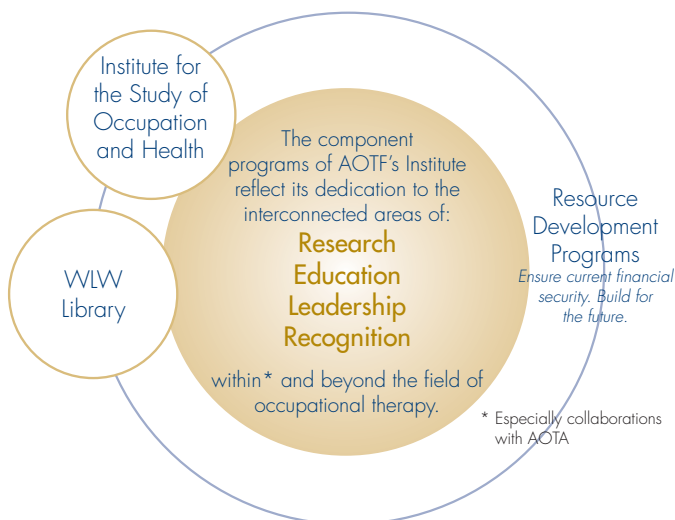
Gratefully,



Ruth Ann Watkins  
President

# Program Report

The educational and scientific programs of the Foundation – organized chiefly under the Institute for the Study of Occupation and Health – reflect our dedication to the interconnected areas of **advancing research, enhancing leadership, and fostering excellence in education and practice**. To these ends, the accomplishments of the AOTF Institute in fiscal year 2007 were many.



## Advancing Research

*Develop knowledge and build an interdisciplinary network of scientists*

### Habits, Health, and Society

AOTF convened its third interdisciplinary research conference to foster dialogue, research, and theory development about habits. Entitled *Habit and Rehabilitation: Promoting Participation*, this conference was funded in part through a grant from the National Center for Medical Rehabilitation Research of the National Institutes of Health. The proceedings of this conference were published as a supplement to the fall 2007 issue of the Foundation's scientific journal *OTJR: Occupation, Participation and Health*.

## **Research Programs at the AOTA Conference and Exposition**

AOTF offered several research-focused programs at the AOTA annual conference in St. Louis, including an AOTF-AOTA jointly-sponsored pre-conference institute entitled "Building an Academic Career With a Research Training Award." In addition, the Foundation hosted its annual *AOTF Research Colloquium and Tea*, entitled "The Significance of Population Research for Occupational Therapy," and the *AOTF Qualitative Research Exchange (QRE)*, entitled "'Emergence' in a Structured World."

## **Research Advisory Panel**

Established during the spring of 2007, the AOTA/AOTF Research Advisory Panel will advise the AOTA and AOTF boards of directors in several matters, including the translation of research to education and practice, and the review of the research agenda of the profession and its alignment with national research priorities and emerging social and technology issues. The panel will also foster critical analyses of issues related to the delivery of services, evolution of theories, and the overall body of knowledge relevant to occupational therapy.

Appointed by the AOTA and AOTF presidents, members of the panel include:

Joan Rogers, PhD, OTR/L, FAOTA – Chair

M. Carolyn Baum, PhD, OTR/L, FAOTA

Wendy Coster, PhD, OTR/L, FAOTA

Joyce Engel, PhD, OTR/L, FAOTA

Joy M. Hammel, PhD, OTR/L, FAOTA

Mary Law, PhD, OT(C)

Mary C. Lawlor, ScD, OTR/L

Trudy R. Mallinson, PhD, OTR/L, NZROT

William Charles Mann, PhD, OTR, FAOTA

Kenneth J. Ottenbacher, PhD, OTR, FAOTA

Mary Lynn Schneider, PhD, OTR

## **Dissertation Research Grant Program**

The Dissertation Research Grant Program represents one of AOTF's chief investments in building the careers of academic scientists. This program specifically promotes the development of qualified faculty members whose careers focus on contributing to science in occupational therapy. Grants are awarded to occupational therapists whose dissertation research directly contributes to one of the profession's Research Priorities and the Parameters for Practice and where a strong program of mentoring is available to the candidate. Recipients in 2007 included:

Jessica Kramer, MS, OTR/L, University of Illinois at Chicago  
*Understanding Disabled Children's Competence and Value for Everyday Activities*

Marie-Christine Potvin, MHS, OTR/L, McGill University  
*Intensity, Variety and Type of Recreational Activities in School Age Children with High Functioning Autism*

Shirley Ann Wells, MPH, OTR, University of Texas Health Sciences Center at Houston, School of Public Health  
*Occupational Performance Among Mexican Americans Living on Hemodialysis in the Rio Grande Valley of Texas*

## **Enhancing Leadership**

*Build capacity to expand science in occupational therapy*

## **Academy of Research**

Established by AOTF in 1983, the Academy of Research in occupational therapy recognizes individuals who have made exemplary and distinguished contributions to the science of occupational therapy. By vote of the Academy in 2007, three distinguished researchers joined this prestigious body:

Daniel Bourbonnais, PhD, OT(C)  
Université de Montréal

Joyce Engel, PhD, OTR/L, FAOTA  
University of Washington

Catherine Lysack, PhD, OT(C)  
Wayne State University

## Leadership Mentoring Fellowships

AOTA and AOTF jointly granted leadership mentoring fellowships to 18 committed occupational therapy faculty, enabling them to participate in a nine-month “mentoring circle.” During this period, participants shared stories about the experiences in leadership, gained new insights into their leadership development, and received tools to become more successful leaders in both their academic and professional lives. All participants developed an individual plan for their future development as academic leaders.

## Awards

AOTF was pleased to bestow the following awards in 2007 to individuals who made significant and sustained contributions to the mission of AOTF.

### *Certificate of Appreciation*

- Christine Peters, PhD, OTR

### *Virginia Scardina Award of Excellence*

- Joan Dostal, OTR/L

### *Pi Theta Epsilon Mary J. Bridle First Research Award*

- Lauren R. Franklin, MS, OTR/L

### *Leadership Service Commendation*

- Helen L. Hopkins, EdD, OTR/L, FAOTA (Posthumous)
- Nancy L. Beck, MA, OTR/L
- Elizabeth Tiffany Mather, MEd, OTR, FAOTA
- Carole Simon, MS, OTR/L

## Doctoral Network

Under the leadership of Penny Kyler, MA, OTR, FAOTA, the Doctoral Network (DocNet) continued to facilitate development of doctoral education among occupational therapy practitioners by providing networking opportunities and collaborative engagement among emerging and established scholars.

## Pi Theta Epsilon

AOTF continued its support of PTE and its mission to recognize and encourage superior scholarship among students enrolled in professional entry-level programs at accredited schools across the United States. At AOTA annual conference, PTE offered a workshop entitled “Yesterday to Today: Occupational Therapy and the U.S. Army.”



## **Fostering Excellence in Education and Practice**

*Develop faculty and disseminate knowledge to enhance practice of occupational therapy*

### **Wilma L. West Library**

The cornerstone of the Institute for the Study of Occupation and Health is the Wilma L. West Library, which serves as the national repository for the literature of the occupational therapy profession, including journals, newsletters, monographs, proceedings, reports, doctoral dissertations, and master's theses that address the education, theory, and practice of occupational therapy and the study of occupational science. In cooperation with AOTA, the Wilma L. West Library supports *OT SEARCH*, the profession's largest and most comprehensive online bibliographic database encompassing the literature of occupational therapy and related subject areas. During 2007, 1,500 new items were added to *OT SEARCH* and the Wilma L. West Library.

### **Program for the Scholarship of Teaching and Learning**

Through a pre-conference institute at the AOTA annual conference, AOTF launched its Program for the Scholarship of Teaching and Learning (SoTL), a mentoring-focused initiative aimed to enhance occupational therapy education and faculty development through study and implementation of the SoTL inquiry process.

### **Scholarships**

During 2007, AOTF is proud to have awarded scholarships to 39 deserving occupational therapy students around the country. These scholarships were funded through the generosity of corporate partners, individual memorials and endowments, and the scholarships of 20 state associations.

### **Professional Master's Degree in Occupational Therapy**

#### **North Coast Medical Scholarship - \$5,000 each**

Amber DeGraff, Midwestern University

Mary Coyne, Colorado State University

**Kappa Delta Phi Scholarship – \$2,000 each**

Laura Tomlinson, Saint Louis University  
Maya Fok, Dominican University of California

**Willard & Spackman Memorial Scholarship - \$2,000**

Jessica Ogden, Elizabethtown College

**Carolyn Kohn Memorial Scholarship - \$2,000**

Karen Grefe, Stony Brook University

**Ethel Beard Burstein Scholarship – \$1,200**

Megan Angerson, Temple University

**Progressus Therapy Scholarship - \$1,000 each**

Theresa Bowen, University of Florida  
Amy King, University of North Carolina at Chapel Hill  
Anne Kiraly, University of Illinois at Chicago

**Renee Achter Memorial Scholarship - \$1,000**

Julie Werner, University of Southern California

**Diane Blicksilver Aja Memorial Scholarship - \$1,000**

Sarah Morken, University of Puget Sound

**Janice McGraw Memorial Scholarship - \$1,000**

Denise Griggs, Lenoir-Rhyne College

**Assembly of Student Delegates Scholarship - \$450**

Jamie Fracol, Rockhurst University

**Ruth Peterson Memorial Scholarship (Kappa Chapter of Pi Theta Epsilon)  
- \$375**

Christina Thompson, University of North Dakota

**ASSOCIATE DEGREE IN OCCUPATIONAL THERAPY**

**Carlotta Welles Scholarship - \$500 each**

Ashleigh Goar, Holmes Community College  
Cindy Godwin, Cabarrus College  
Amy Rose, College of Saint Catherine

## 2007 AOTF / STATE ASSOCIATION SCHOLARSHIPS

The Adelaide Ryerson Smith Memorial Award of the Arizona Occupational Therapy Association - \$1,000

Nicoletta Calorie, A.T. Still University

The Florence Wood Arkansas Occupational Therapy Association Scholarship - \$500

Megan Boeckman, University of Central Arkansas

The LOTA Scholarship of the Louisiana Occupational Therapy Association - \$500

Sunni Holden, Louisiana State University Health Sciences Center

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

Leah Bicknell, Tufts University

The Michigan Occupational Therapy Association Scholarship - \$500

Barbara Boenheim, Eastern Michigan University

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

Jennifer Strand, University of New Mexico

The New York State Occupational Therapy Association Scholarship - \$1,000 each

Professional Master's Degree in Occupational Therapy

Nora Presutti, Mercy College

Stefanie Michaelsen, Touro College

Brianne Pugliese, SUNY Buffalo

The North Carolina Occupational Therapy Association Scholarship- \$300  
Associate Degree in Occupational Therapy

Michelle Beachum, Cabarrus College of Health Sciences

The Ohio Occupational Therapy Association Scholarship - \$1,000  
Professional Master's Degree in Occupational Therapy

Anne Rings, The Ohio State University

The Occupational Therapy Association of Oregon Scholarship - \$1,100

Christine Van Osdol, Pacific University

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

Professional Master's Degree in Occupational Therapy

Danielle Shuttleworth, University of Pittsburgh

Amalie Andrew, University of Pittsburgh

The Texas Occupational Therapy Association Scholarship - \$2,000 each

Professional Master's Degree in Occupational Therapy

Cory Grandinetti, Texas Woman's University

Jennifer Matsu, Texas Woman's University

The Utah Occupational Therapy Association Scholarship - \$350

Karissa Ballner, University of Utah

The West Virginia Occupational Therapy Association

The Charlotte Prudich Scholarship - \$600

Alexis Lilly, West Virginia University

The Elizabeth B. Devereaux Scholarship - \$150

Rebecca Frame, Mountain State University

The Wisconsin Occupational Therapy Association Scholarship

- \$1,000 each

Professional Master's Degree in Occupational Therapy

Anna Roth, University of Wisconsin, Madison

Elyse Anderson, University of Wisconsin, Madison

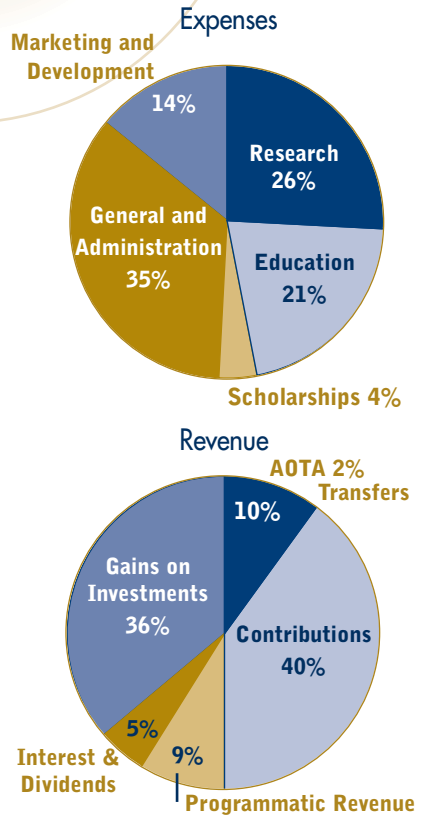
# Stewardship and Accountability

## Fiscal Year 2007

AOTF closed the fiscal year on September 30, 2007. Net assets at the close of FY 2006-2007 were \$10,927,577 as compared with \$10,270,118 the prior year. The increase in net assets is attributable to realized and unrealized gains 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 \$1,478,763 including \$144,406 from AOTA 2% transfers representing AOTA members' contributions. Programmatic and operating expenses were \$1,147,287. Total gains on marketable securities were \$385,644 resulting in an increase in net assets for FY 2006-2007 of \$661,183.

In FY 2006-2007, the Foundation incurred expenses in the following programmatic categories.



	2007
<b>PROGRAM EXPENSES</b>	
Research	\$ 294,718
Education	245,015
Scholarships	48,621
	<b>588,354</b>
<b>SUPPORT SERVICES</b>	
Administration and general	399,133
Marketing and development	159,800
	<b>558,933</b>
	<b>\$ 1,147,287</b>

## ASSETS

	<b>2007</b>	<b>2006</b>
<b>CURRENT ASSETS</b>		
Cash and cash equivalents	\$ 429,403	\$ 227,209
Contributions receivable	1,500	5,000
Pamphlets and pins	2,805	931
Other receivables and prepaid expenses	89,630	68,973
	<b>523,338</b>	<b>302,113</b>
<b>MARKETABLE SECURITIES</b>		
Corporate bonds	157,535	212,312
Common stocks	1,737,022	1,572,662
	<b>1,894,557</b>	<b>1,784,974</b>
<b>SPLIT-INTEREST GIFTS</b>		
Pooled income fund	76,544	77,653
Charitable remainder unitrust	1,098,948	1,005,835
Charitable remainder trusts	7,125,941	6,908,588
	<b>8,301,433</b>	<b>7,992,076</b>
<b>FIXED ASSETS</b>		
Net of accumulated depreciation of \$106,950 and \$88,845	<b>18,105</b>	<b>3,169</b>
<b>OTHER ASSETS</b>		
Contributions receivable	—	1,308
Certificate of deposit—collateral on loan	174,713	168,236
Cash surrender value of life insurance ("net of related policy loans of \$178,667 and \$155,787")	15,431	18,242
	<b>190,144</b>	<b>22,911</b>
<b>TOTAL ASSETS</b>	<b>\$ 10,927,577</b>	<b>\$ 10,270,118</b>

## LIABILITIES AND NET ASSETS

<b>LIABILITIES</b>		
Accounts payable and accrued expenses	\$ 84,488	\$ 33,995
Due to affiliate	97,683	372
Liability under unitrust agreement	249,825	235,256
Liability for future interest in pooled income fund	17,518	17,543
Deferred compensation	204,876	196,996
Line of Credit	226,222	70,467
	<b>880,620</b>	<b>554,629</b>
<b>NET ASSETS</b>		
Temporarily restricted	1,618,727	1,504,807
Permanently restricted	8,660,678	8,430,914
Unrestricted	(232,440)	(220,232)
	<b>10,050,681</b>	<b>9,715,489</b>
<b>TOTAL LIABILITIES AND NET ASSETS</b>	<b>\$ 10,927,577</b>	<b>\$ 10,270,118</b>

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.

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Jeffrey S. Reznick

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