

Annual Report 2008



MISSION

To advance knowledge, science, and innovation in occupational therapy in the interest of the public good.

VISION

The American Occupational Therapy Foundation will be a leader in transforming the occupational therapy profession to be science driven, outcome focused, and responsive to the needs of society, including healthcare.

President's Letter to our Stakeholders *Flourishing in an Era of Challenge and Uncertainty*

Foundations resolve to be bedrocks of support, to be unwavering in their commitment to enable progress despite challenging times, and to be guided by values and principles. This past year has been a test of that resolve for all non-profit organizations, including the American Occupational Therapy Foundation.

During this time of economic challenge and uncertainty, the AOTF Board of Directors has worked closely with staff to examine our mission and programs and to ensure that our stewardship of precious resources is consistent with honoring occupational therapy's distinguished past, serving the compelling needs of the present, and moving ahead to secure the profession's future.

While the past year has been challenging, it has also been marked by progress and promise. Several new board directors, including occupational therapy

leaders Dr. Bette Bonder and Mary Foto, Patricia Booth, and Dr. Adam Drobot have joined the Board. In March 2008, AOTF recruited a new executive director, Dr. Charles Christiansen, and later, Jeanne Cooper became our new scholarship coordinator. Systems and technology have been upgraded for better effectiveness and efficiency of operation and service.

Because of the rapid changes in the economy, the financial information provided in our audited report for 2008 does not fully reflect the nature of the challenges we are experiencing. Like all foundations with investment portfolios, our net assets have declined significantly. We hope for a speedy rebound, but we have planned for multiple contingencies.

The year 2008 marked our scheduled revision of the AOTF Strategic Plan. This is timely, since it enables us to hold a vision for the future while adjusting our programmatic initiatives

reflect fiscal uncertainties and changing needs in the profession.

AOTF values its many partnerships and in particular takes pride in its joint projects with the American Occupational Therapy Association. AOTF is committed to the realization of the profession's Centennial Vision through our scholarships, grants, recognitions, publications, and programs supporting leadership and research development. In the months ahead, we are dedicated to continuing to focus our efforts toward finding resources for supporting students, scientists and emerging leaders. These are activities that serve the practitioners of occupational therapy and provide enduring value toward assuring the future. We believe that occupational therapy will best flourish as a 21st century profession

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“You will make the difference”

President’s Letter *continued*

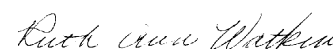
through the advancement of knowledge, science and innovations in practice. These will serve vital needs that recognize full participation in life as the ultimate goal of health care.

You will make the difference as we mount our various fundraising

campaigns to invest in the future of the profession. On behalf of the board and staff, we thank you for your continued generosity and your shared belief in the future of occupational therapy. We welcome your ideas and we resolve to continue earning your

trust through wise stewardship and an unwavering commitment to the values of the profession.

Sincerely,



Ruth Ann Watkins
President

The Foundation continues to advance research

Programmatic Highlights of the Foundation

Despite the distractions of an economic meltdown and the assumption of duties by a new Executive Director, the Foundation was able to continue with its vital work in advancing research, enhancing leadership, and fostering excellence in education and practice.

Advancing Research

AOTF offered several research-focused programs at the AOTA annual Conference and Exhibition in Long Beach, California, including an AOTF-AOTA jointly-sponsored pre-conference institute entitled “Academic Writing in Occupational Therapy.” In addition, the Foundation hosted its annual AOTF Research Colloquium and Tea, entitled “Charting the Past, Present, and Future

of Research in Occupational Therapy” and the AOTF Qualitative Research Exchange (QRE), entitled “New Frontiers in Qualitative Research.” Additionally, following discussion at the fall 2008 Occupational Therapy Program Director’s Meeting, AOTF agreed to take the lead in planning a special forum – entitled *Developing a Research Enterprise: Dialogue for the Future of the Profession* – to be held at the 2009 AOTA annual Conference and Exhibition in Houston.

Research Advisory Panel

Established during the spring of 2007, the AOTF/AOTA Research Advisory Panel made great strides in reviewing the research priorities of the profession and

aligning them with national research priorities and emerging social and technology issues. The panels also offered valuable guidance on topics related to the translation of research to education and practice, delivery of services, evolution of theories, and the assessments of the overall body of knowledge relevant to occupational therapy.

Appointed by the AOTF and AOTA 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

Representing 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 research priorities of the profession and where a strong program of mentoring is available to the candidate. Recipients in FY 2008 included: **Mary Lou Liebold**, MS, OTR/L, University of Pittsburgh, *Applying Selective Optimization with Compensation to Older Adults Recovering from Depression*; **Pai-Chuan Huang**, MS, OT, Tufts University, *Facial Expressiveness and Social Quality of Life in Parkinson's Disease: A Rapport Mediated Model*;

Anne Leslie Vaughan, MS, University of North Carolina at Chapel Hill, *Executive function in daily life: Age-related influences of executive processes on instrumental activities of daily living*;

Jeanine Martin Blanchard, MA, University of Southern California, *A Mixed-Methods Study of Older Adults in a Lifestyle Redesign® Program*;
Elizabeth Ann Pyatak, MA, University of Southern California, *Diabetes Management in the Everyday Lives of Emerging Adults*; **Gwen Weinstock-Zlotnick**, MA, OTR/L, CHT, New York University, *How Occupational Therapists Specializing in Hand Therapy Consider Participation During Initial Evaluation: A Look at Diagnostic Reasoning*;
Scott Anthony Trudeau, MA, OTR/L, Tufts University, *Elder perceptions of Higher Education and Successful Aging*; **Sue Elizabeth Berger**, MS, OTR/L, BCG, Boston University, *Leisure Time Participation Among Older Adults with Low Vision*; and **Meryl Marger Picard**, MSW, OTR, Seton Hall University; *The Effects of Tai Chi on Cancer-Related Fatigue, Grip Strength, and Quality of Life in Breast Cancer Survivors*.

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.

Enhancing Leadership

Academy of Research

Established 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 2008, three distinguished researchers joined this prestigious body:

Grace T. Baranek, PhD, OTR/L, FAOTA, University of North Carolina at Chapel Hill

Shula Parush, PhD, OTR, Hebrew University, Jerusalem

Janet Poole, PhD, OTR/L, FAOTA, University of New Mexico

The Foundation invests in the future of occupational therapy.

Martha Kirkland Leadership Legacy Fund

The Foundation began plans to raise one half million dollars for the Martha Kirkland Leadership Legacy Fund in order to recognize future leaders of occupational therapy through scholarships and leadership development.

Leadership Mentoring Fellowships- The Mentoring Circle

The Foundation continued its efforts to foster leadership development. A second class of Leadership Fellows completed their Mentoring Circle experience. This group consisted of directors from accredited programs in occupational therapy at both graduate and associate levels and was so successful that a decision was made to recruit a third group of fellows following the same model for 2009.

Pi Theta Epsilon

The Foundation completed the process of integrating occupational therapy's only nationally accredited honor society, Pi Theta Epsilon fully into its organizational structure. With this change, the president of PTE becomes a voting member of the board.

Awards

Once again, AOTF was pleased to recognize the following individuals for

significant and sustained contributions to the development of excellence in occupational therapy education, research and practice:

Virginia Scardina Award of Excellence

Zoe Mailloux, MA, OTR, FAOTA, Pediatric Therapy Network

A. Jean Ayres Award

Beatriz Abreu, PhD, OTR, FAOTA, Transitional Learning Center

Roseann. C. Schaaf, PhD, OTR/L FAOTA, Thomas Jefferson University

AOTF Leadership Service Commendation

Virginia Dickie, PhD, OTR/L, FAOTA, University of North Carolina at Chapel Hill

Perri Stern, EdD, OTR/L, FAOTA, educational consultant

Gretchen Stone, PhD, OTR, FAOTA, University of Texas Medical Branch

Elizabeth Crepeau, PhD, OTR, FAOTA, University of New Hampshire

AOTF Certificate of Appreciation

Wendy Coster, PhD, OTR/L, FAOTA, Sargent College of Rehabilitation Sciences, Boston University

Helene Polatajko, PhD, OT (C), OT Reg. (Ont.), FCAOT, University of Toronto

Janet Craik, OT(C), MSc, Fredericton, New Brunswick

Honorary Life Membership

Ann P. Grady, PhD, OTR, FAOTA, Denver, Colorado

Jane Davis Rourk, OTR/L, BCP, FAOTA, Durham, North Carolina

Donald Lang, Chicago, Illinois

AOTF Meritorious Service Award

Jean Deitz, PhD, OTR, FAOTA, University of Washington

Reatha Clark King, PhD, Minneapolis, Minnesota

Fostering Excellence in Education and Practice*OTJR: Occupation, Participation and Health*

During 2008, AOTF expanded its publication of this scientific journal serving occupational therapy and occupational science by increasing the number of articles published each year from 16-20. The journal continues to be available electronically and in print form at www.otjronline.com.

Wilma West Library

The Foundation continued its partnership with AOTA in providing support for OT SEARCH, the profession's largest and most comprehensive online bibliographic database. During 2008, over 1,300 new items were added to OT SEARCH and the Wilma L. West Library.

The Foundation prepares the leaders of tomorrow.

Program for the Scholarship of Teaching and Learning

Through a pre-conference institute at the AOTA Annual Conference and Exhibition in Long Beach, California, AOTF continued its successful Program for the Scholarship of Teaching and Learning in Occupational Therapy, a mentoring-focused initiative aimed to enhance occupational therapy education and faculty development through study and implementation of the teaching and learning process.

Scholarships

The Foundation completed work on an online application and review system for its scholarships to be fully implemented in 2009. Planning has begun for a major scholarship initiative designed to increase the number and amount of scholarships available to occupational therapy students.

In 2008, the following scholarships were awarded:

PROFESSIONAL MASTER'S DEGREE IN OCCUPATIONAL THERAPY

North Coast Medical Scholarship - \$5,000 each
Amy Atterholt, Ohio State University
Jennifer Ellis, Eastern Michigan University

Kappa Delta Phi Scholarship - \$2,000 each
Carli Minich, University of Toledo
Eugenia Rodriguez, University of Florida

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

Justine Rehak, Rush University
Lawrence Stevenson, Temple University

Ethel Beard Burstein Scholarship - \$1,200 each

Lorie Lengyel, University of Pittsburgh
Brie Weisman, University of Southern Maine

Progressus Therapy Scholarship - \$1,000 each

Maria Balsimo, University of Southern California
Meredith Forbes, University of Southern California
Ina Ramirez, University of Illinois at Chicago

Renee Achter Memorial Scholarship - \$1,000

Kathryn Henneman, Boston University

Naida Ackley Memorial Scholarship - \$1,000

Erika Reed, Virginia Commonwealth University

Diane Blicksilver Aja Memorial Scholarship - \$1,000

Kimberly Martell, Tufts University

Susan Lang Memorial Scholarship - \$1,000

Juleen Rodakowski, University of Illinois at Chicago

Janice McGraw Memorial Scholarship - \$1,000

Rachel Watrous, University of North Carolina

Mary Minglen Memorial Scholarship - \$1,000

Tiffany Kennard, University of Puget Sound

Frank Oppenheimer Memorial Scholarship - \$1,000

Karen Smith, Colorado State University

Frank Oppenheimer Memorial Scholarship - \$1,000

Karen Smith, Colorado State University

Edith Weingarten Memorial Scholarship - \$1,000

Rebecca Tucker, Colorado State University

Assembly of Student Delegates Scholarship - \$600

Jess Salyers, Indiana University-Purdue University

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

Nikki Dahlstrom, University of North Dakota

ASSOCIATE DEGREE IN OCCUPATIONAL THERAPY

Assembly of Student Delegates Scholarship - \$600

Ariel Richards, Dominican University of California

Carlotta Welles Scholarship - \$500 each

Virginia Kelley, Eastern New Mexico University - Roswell

Doug Thomas, Allegany College of Maryland

2008 AOTF / STATE ASSOCIATION SCHOLARSHIPS

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

Sheena Leavell, University of Central Arkansas

The OTAC Scholarship of the Occupational Therapy Association of Colorado - \$500

Janine Angello, Colorado State University

The District of Columbia Occupational Therapy Association Scholarship - \$500 each

Senewa Moyo, Howard University
Sandra Ossio, Howard University

The Kansas Occupational Therapy Association Scholarship - \$500

Logan Blackburn, University of Kansas Medical Center

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

Jeffrey Clift, Louisiana State University

The Henrietta Price Scholarship of the Maryland Occupational Therapy Association - \$500 each

Dana Burns, Towson University
Agnieszka Mikolajczyk, Community College of Baltimore County-Catonsville

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

Bayla Fischer, Boston University

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

Devon Edwards, University of New Mexico

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

Professional Master's Degree in Occupational Therapy
Yefim Khaydatov, Long Island University, Brooklyn

Kathleen Murphy, Stony Brook University
Rebecca Toth, Mercy College

Associate Degree in Occupational Therapy - \$150
Johanna Campo, Stony Brook University

The North Carolina Occupational Therapy Association Scholarship - \$750 each

Professional Degree in Occupational Therapy
Amy King, University of North Carolina at Chapel Hill

Associate Degree in Occupational Therapy

Brandon Scott, Cabarrus College of Health Sciences

The Ohio Occupational Therapy Association Scholarship - \$1,000 each

Professional Master's Degree in Occupational Therapy
Chelsea McAlpin, Xavier University
Stephanie Tedrick, Ohio State University

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

Holly Edwards, Pacific University

The Reba M. Sebelist Scholarship of the Pennsylvania Occupational Therapy Association - \$500 each
Professional Master's Degree in Occupational Therapy

Hannah Ritter, University of Pittsburgh
Laura Waterstram, University of Pittsburgh

The Chris Ebbers Scholarships of the South Carolina

State Occupational Therapy Association - \$500 each

Paisley Polk, Medical University of South Carolina
Tara Hassler, Medical University of South Carolina

Texas Occupational Therapy Association Scholarship - \$2,000 each
Professional Master's Degree in Occupational Therapy

Jessica Raub, University of Texas Medical Branch
Megan O'Neill, Texas Woman's University

Utah Occupational Therapy Association Scholarship - \$350

Alison Lord, Brigham Young University

The West Virginia Occupational Therapy Association

The Charlotte Prudich Scholarship - \$600
Cortney Logsdon, West Virginia University

The Elizabeth B. Devereaux Scholarship - \$150

Jodie Gantzer, West Virginia University

The Wisconsin Occupational Therapy Association Scholarship - \$1,000 each

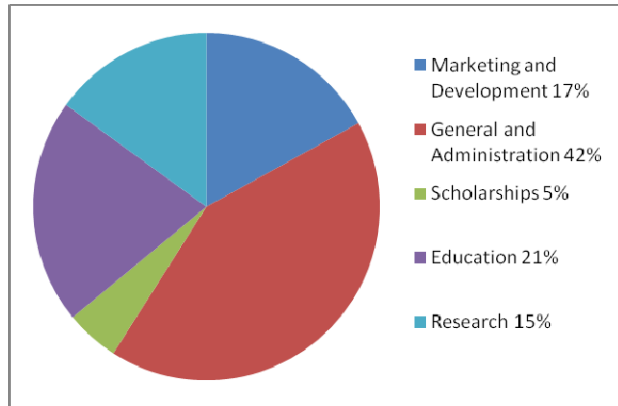
Professional Master's Degree in Occupational Therapy
Jessica Klatt, University of Wisconsin, Madison
Kelly Wolski, Mount Mary College

Post-Professional Doctoral Degree in Occupational Therapy or Related Field - \$1,500

Rochelle Mendonca, PhD in Health Sciences, University of Wisconsin-Milwaukee

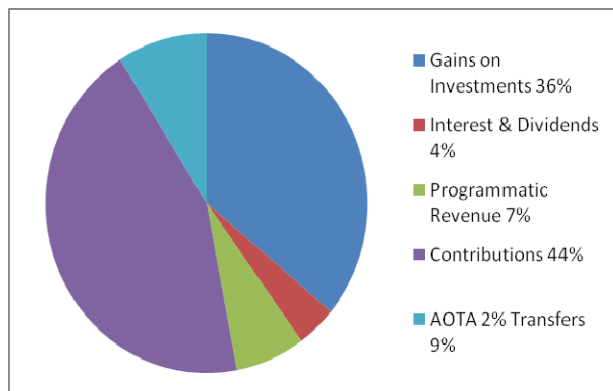
Stewardship and Accountability Fiscal Year 2008

Expenses



Largely as a result of the global economic crisis, Fiscal Year 2008 was difficult for all non-profit organizations, and AOTF was not spared. At the close of the fiscal year on September 30, the Foundation's net assets stood at \$7,484,326, representing a decline of 25.5%. Although overall operating expenses were reduced from the previous year, necessary investments in the information technology-operating infrastructure, including hardware, software, and Internet expenses, coupled with increases in the cost for personnel and the loss of investment revenue, created a net operating loss for the year. Given these challenges, the board and staff commenced a significant reduction of the proposed budget and began implementing highly conservative cash management strategies for operations.

Revenue



In FY 2008, The Foundation incurred expenses in the following programmatic categories:

Program Expenses

Research	\$171,892
Education	244,615
Scholarships	56,975
Total Program Expenses	\$473,482

Support Services

General and administration	\$471,367
Marketing and development	195,246
Total Support Services	\$666,613
Total Expenses	\$1,140,095

ASSETS			
	2008		2007
CURRENT ASSETS			
Cash and cash equivalents	\$ 334,817	\$	429,403
Contributions receivable	\$ 6,044	\$	1,500
Pamphlets and pins	\$ 1,442	\$	2,805
Other receivables and prepaid expenses	\$ 94,192	\$	89,630
	\$ 436,495	\$	523,338
MARKETABLE SECURITIES			
Corporate bonds	\$ 118,057	\$	157,535
Common stocks	\$ 1,310,889	\$	1,737,022
	\$ 1,428,946	\$	1,894,557
SPLIT-INTEREST GIFTS			
Pooled income fund	\$ 71,633	\$	76,544
Charitable remainder unitrust	\$ 816,431	\$	1,098,948
Charitable remainder trusts	\$ 5,512,937	\$	7,125,941
	\$ 6,401,001	\$	8,301,433
FIXED ASSETS			
Net of accumulated depreciation of \$93,286 and \$89,703	\$ 29,587	\$	18,105
OTHER ASSETS			
Certificate of Deposit - collateral on loan	\$ 181,448	\$	174,713
Cash surrender value of life insurance ("net of related policy loans of \$189,008 and \$181,436")	\$ 13,156	\$	15,431
	\$ 194,604	\$	190,144
TOTAL ASSETS	\$ 8,490,633	\$	10,927,577
LIABILITIES AND NET ASSETS			
LIABILITIES			
Accounts payable and accrued expenses	\$ 86,193	\$	84,488
Due to affiliate	\$ 102,714	\$	97,683
Liability under unitrust agreement	\$ 241,644	\$	249,825
Liability for future interest in pooled income fund	\$ 18,926	\$	17,518
Deferred compensation	\$ 170,522	\$	204,876
Line of credit	\$ 386,308	\$	226,222
	\$ 1,006,307	\$	880,612
NET ASSETS			
Temporarily restricted	\$ 1,343,234	\$	1,618,727
Permanently restricted	\$ 7,048,854	\$	8,660,678
Unrestricted	\$ (907,762)	\$	(232,440)
	\$ 7,484,326	\$	10,046,965
TOTAL LIABILITIES AND NET ASSETS	\$ 8,490,633	\$	10,927,577

Securing the Future

The Board of Directors and staff express sincere appreciation to those who supported the Foundation during the 2008 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.

\$5,000 and above

Anonymous
Donald F. Lang
Texas Occupational Therapy Assn.
Microsoft Corporation
North Coast Medical, Inc.
Fred Sammons

\$1,000 - \$4,999

Bette Bonder
Jennifer L. Brown
Elizabeth B. Devereaux
Cynthia F. Epstein
Mary Elizabeth Foto
Forbes Foundation
Frank Edward Gainer
Ann P. Grady
Mindy A. Hecker
Kappa Delta Phi Sorority
Mass. Assn. for Occupational Therapy
Maralynne Mitcham
Nancy Drenan Prendergast
Retirement Research Foundation
Sharon G. Ryan
Nancy Vespar Snyder
Ida Miriam Stern Trust
Nancy Holt Talbot
Ruth Ann Watkins
West Virginia Occupational Therapy Assn..
Stephen Wilburn
G Gordon Williamson
Wisconsin Occupational Therapy Assn.

\$500 - \$999

B. Joan Bellman
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Comprehensive Therapeutics
Florence Cromwell
Mary Margaret Evert
Hanna Gruen
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RTS Residential Block
Sophia Rydin
South Carolina Occupational Therapy
Assn..
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Erica Beth Stern
Yvonne Russell Teske

\$250 - \$499

Dorit Aaron
M. Carolyn Baum
Terry Crowe
Clara Louise Dubbs
Edward L. Frye
Carol Gwin
Carol Haertlein Sells
Hand Therapy Society of Greater Los
Angeles
Susan J. Harris
Marilyn Hennessy
Ruth Anne Humphry
Sheila R. Krajnik
Mary C. Lawlor
Lela Augustine Llorens
Virgil Mathiowetz
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Frederick P. Somers
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Catherine A. Trombly Latham
Ruth Brunyate Wiemer
Martha M. Kirkland
Phyllis Bauer Madachy
Madison Restaurant
Patrick H. McClain
Gretchen Van Mater Stone
S. Maggie Reitz
Wisconsin Occupational Therapy
Assn.

\$100 - \$249

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Elizabeth S. Alianan
Maria Irma Alvarado
Augusto Ivan Aranguren
Marian C. Arbesman
Mary At Lee Brandt
Austill's Rehabilitation Services, Inc.
Diana Jean Baldwin
Grace T. Baranek
Dawn Lee Barnier
John J. Bazyk
Dolores Eve Behrouzy-Far
Pauline Bennett-Gannon
Andrea M. Bilics
Teri L. Black
Robert C. Blicksilver
Bette Bonder
Richard Bookwalter
Alice M. Bowker
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Juanita Ann Bruns
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Josephine Cohen
Wendy Coster
Elizabeth Blesedell Crepeau

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 University of Tennessee Health
 Science Center
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 Dawn Marie Voss
 Mary Workman Voytek
 Toni Marie Walski
 Shirley A. Wells
 Judith Brown Whaley Morris
 Martha W. Wilcockson
 Carol Hideman Wiley
 Jane W. Willis
 Lawrence E. Zachow
 Pauline R. Zangrillo

\$50 - \$99

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 Elizabeth S. Alianan
 Evelyn J. Alston
 Lucy D. Anderson-Duyck
 Dona Lee Elizabeth Andrew
 Sarah Apfeld-Inman
 Sarah Miriam Appleman
 Dolores Ann Arroyo
 Joyce E. Baldwin
 Marcia Gevelinger Bastian
 Mary Frances Baxter
 Susan Sadlek Bazyk
 Alison Jean Beck
 Lorilee Becker
 Marjory Ann Becker-Lewin
 Paula Jo Belice
 Jane Hoeker Bell
 Ruth E. Benedict
 Lucretia Ann Berg
 Laura Mae Bernemann
 Rachel Gail Bernzweig
 Michele Berro
 Roxie Mona Black
 Margaret N. Blair
 Monette E. Blanchard
 Timothy L. Blasius
 Margaret C. Blodgett
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 Glenda J. Brawley
 Mary Johnston Bridle
 Kelly Carsletter
 Jane D. Case-Smith
 Louann Wilcox Cavett
 Anthony J. Cenzoprano

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 Hui-I Chen
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 Carol Maier Clerico
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 Cindy Lou Hahn
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 Jodi L. Johnson
 Margo Johnson
 Melissa Wilde Jones
 Nancy Marie Jones-Broadway
 Ramona W. Jordon-Durham
 Tara Coughlin Joyce
 Leslie Ann Kane
 Mary Courteol Kasch
 Pamelyn J. Kearney
 Kathryn A. Kelley
 Stephen Kern

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