Celebrating 50 Years

...OF ADVANCING THE SCIENCE OF
OCCUPATIONAL THERAPY

Report to Donors 2014

Wilma L. West,
AOTF Co-Founder

Pi Theta Epsilon
Founded 1958

Our Signature
Scientific Journal,
first published 1981

A Winner of 40th Anniversary Photo Contest

Academy of Research
Founded 1983
Dear Friends,

During this 50th anniversary year, it is an extraordinary privilege to serve the American Occupational Therapy Foundation and profession through my participation as board chair. AOTF’s founders in 1965 were leaders of great vision. They imagined the need and importance of having a scientific and charitable organization whose work would advance theory and research in occupational therapy. They knew that disseminating information to support research would be important, and they realized that having credible evidence to support safe and effective occupational therapy practice would be essential. Clearly, they understood that Research Matters.

But could they have envisioned that fifty years later, respected scientists at research universities across the United States would be receiving generous AOTF grants each year to fund their occupational therapy intervention research? Could they have imagined that scores of deserving students would receive scholarships funded through AOTF endowments, created with generous contributions by individuals and organizations who believe in occupational therapy’s unique value to health care?

Fifty years from now, the world will be quite a different place. It is easy to imagine that knowledge from research will dramatically advance both medicine and occupational therapy practice. Yet, despite such advances, the vital need for people to have engaging and meaningful lives will not change.

Another thing will not change. AOTF will continue to depend on generous donors to build its endowments and help fund its grant-making and scholarship activities. AOTF will continue to require committed volunteers to serve on its governing board and committees. These collective actions of philanthropy are what have made AOTF the great foundation it is today, and with your support, will make it even greater in the years to come. Thank you for your support over the past year, and for your continued loyalty and commitment to support the Foundation’s mission to advance the science of occupational therapy to support people’s full participation in meaningful life activities.

Sincerely,

Diana L. Ramsay
Chair, Board of Directors
Science of Occupational Therapy

Numbers tell stories.

The sheer number of key programs, publications, scholarships and grants of AOTF’s first half century are impossible to fully account here, but collectively they are indeed impressive. AOTF has sponsored numerous conferences on research, published a leading scientific journal for nearly 35 years, awarded over 1.3 million dollars in scholarships to nearly 1,500 students, and given millions of dollars of research grants to support university-based centers, doctoral research grants, pilot studies, and larger intervention grants to foster theory development and generate evidence to support occupational therapy practice.

Appreciating that committed people worthy of recognition are often behind great accomplishments, AOTF celebrates excellence through programs that honor scientists, students, and volunteer leaders. For example, the prestigious Academy of Research, started in 1983, has now recognized 57 extraordinary occupational therapy scientists. Thousands of students have been inducted into the national Pi Theta Epsilon Honor Society through chapters at over 100 colleges and universities. To help achieve its literary and research aims, AOTF maintains the world’s largest collection of occupational therapy resources through its Wilma L. West Library operated in partnership with the American Occupational Therapy Association. Wilma West could never have imagined that an online database would open this collection to the world. In 2015, AOTF launches its Leaders & Legacies Society with over 140 outstanding volunteers whose belief in the profession has called them to contribute thousands of hours of personal time in the service of advancing the profession.

None of this would have been possible without the support of partner organizations such as the American Occupational Therapy Association and the National Board for Certification in Occupational Therapy as well as numerous corporate and individual sponsors and 21 state associations who generously created endowments to provide perpetual scholarship funding for promising occupational therapy students.

AOTF now looks ahead to the next half century, and is mindful of the ultimate purpose of its efforts: Assuring that the public has access to safe and effective occupational therapy services that are evidence-based and science-driven. With this in mind, expect continued emphasis by AOTF on its efforts to advance the science necessary to sustain a practice grounded in occupation and worthy of continued public support in the 21st century.

Since its inception, AOTF has...
awarded over $1.3 million in scholarships to nearly 1,500 students, and given millions of dollars of research grants to support university-based centers, doctoral research grants, pilot studies, and larger intervention grants.

Research Matters.
Intervention Research Grants – Funding the Future of Occupational Therapy

AOTF launched the Intervention Research Grant (IRG) Program in 2013 as part of its mission to advance the science of occupational therapy to support people’s full participation in meaningful life activities. This grant program will lay the necessary groundwork for larger intervention studies and support the profession’s Centennial Vision of occupational therapy as science-driven and evidence-based. The Intervention Research Grant program receives major funding from the National Board for Certification in Occupational Therapy (NBCOT), the American Occupational Therapy Association (AOTA), and the St. Catherine Challenge.

In the initial year of the IRG, the priority areas selected were autism spectrum disorders and health issues related to aging. In 2014, the funding priorities came from the AOTF/AOTA Occupational Therapy Research Agenda’s intervention category. Priority populations included individuals with developmental disorders, physical impairments, cognitive impairments, mental disorders, chronic health conditions, and preventable secondary conditions. The objectives of the Intervention Research Grant program are to enhance occupational therapy’s contributions to societal needs, fund innovative interventions to connect research-evidence-practice, cultivate interdisciplinary research teams, include underserved and diverse populations in research, and mentor new investigators and researchers.

A Scientific Review Group (SRG) of experienced grant reviewers and an expert statistician reviews the grant applications and rates them using standard NIH grant criteria: Overall impact, significance, innovation, approach, investigator qualifications, and research environment. AOTF funded five awards in FY 2014 and will fund eight awards in FY 2015 with a maximum award of $50,000.

We believe Research Matters.

**FY 2014 Awardees**

- Erin Foster, OTD, MSCI, OTR/L  
  Feasibility and Optimization of a Cognitive Intervention for Parkinson Disease  
  Washington University School of Medicine

- Sandra Magaña, PhD, MSW  
  Promoting Participation among Latino Children with ASD  
  University of Illinois at Chicago

- Beth Pfeiffer, PhD, OTR/L, BCP  
  Manualization of an Intervention to Improve Work Environments for Adults with ASD projects  
  Temple University

- Arlene Schmid, PhD, OTR  
  Merging Yoga and group OT (MY-OT)  
  Colorado State University

- Mary Ellen Stoykov, PhD, MS, OTR/L  
  Bilateral Priming for Upper Extremity Hemiparesis in Older Adults  
  Rush University Medical Center

**FY 2015 Awardees**

- Winifred Dunn, PhD, OTR/L, FAOTA  
  Feasibility of Telehealth Coaching for Rural Families of Children with Autism  
  University of Kansas Medical Center

- Simone Gill, PhD, OTR  
  Use of Motor Learning Principles to Reduce Fall Risks After Surgical Weight Loss  
  Boston University

- Mary Khetani, ScD, OTR/L  
  Feasibility Test of the PEM-Plus: An Innovative Intervention Planning Guide  
  Colorado State University

- Jessica Kramer, PhD, OTR/L  
  An Environment Problem Solving Strategy for Parents of Youth with Disabilities  
  Boston University

- Elizabeth Larson, PhD, OTR  
  5Minutes4Myself: Motivational Occupational Coaching & Mindfulness for Caregivers  
  University of Wisconsin--Madison

- Susan Magasi, PhD  
  Negotiating the Healthcare System: A Peer-OT Lead Intervention  
  University of Illinois at Chicago

- Stacey Reynolds, PhD, OTR/L  
  Effects of Deep Pressure on Arousal and Performance in Persons with Autism  
  Virginia Commonwealth University

- Roseann Schaaf, PhD, OTR/L, FAOTA  
  Testing Outcomes of a Manualized OT Intervention for Children with Autism  
  Thomas Jefferson University
**AOTF Academy of Research 2014 Inductees**

The AOTF Academy of Research recognizes individuals who have made exemplary and distinguished contributions toward the science of occupational therapy.

**DEIRDRE ROSE DAWSON, PHD, OT REG (ONT)**

*University of Toronto, Toronto, Ontario, Canada*

Dr. Dawson is a senior scientist with the Rotman Research Institute at Baycrest in Toronto, an associate professor in the Department of Occupational Science and Occupational Therapy at the University of Toronto and a member of the Heart & Stroke Foundation of Ontario Centre for Stroke Recovery.

Dr. Dawson’s research combines her training in rehabilitation science, epidemiology and neuropsychology in order to best understand how cognitive processes in healthy aging, stroke, and other acquired brain disorders impact people’s abilities to be autonomous in community living and to develop effective interventions that promote optimal participation in everyday life. Her research is funded by the Canadian Institutes of Health Research, the Heart & Stroke Foundation Centre for Stroke Recovery, the Ontario Neurotrauma Foundation, and the Quebec Rehabilitation Research Network.

**JOY HAMMEL, PHD, OTR/L, FAOTA**

*University of Illinois at Chicago, Chicago, Illinois*

Dr. Hammel is professor and Wade Meyer Endowed Chair of Occupational Therapy at the Departments of Occupational Therapy and Disability and Human Development, College of Applied Health Science, University of Illinois at Chicago. She also directs the Graduate Studies for the Occupational Therapy Doctorate and is a faculty member of both the Doctoral Program in Disability Studies and the Doctoral Program in Rehabilitation Sciences.

Dr. Hammel’s research program is focused on participation disparities of people with disabilities, as well as in community-based participatory research related to community living and participation choice, control, and societal opportunity for people who are aging with disabilities. Dr. Hammel has received more than $7 million in federal grant funding and has had continuous funding on 37 grants since 1988.

**ELIZABETH R. SKIDMORE, PHD, OTR/L**

*University of Pittsburgh, Pittsburgh, Pennsylvania*

Dr. Skidmore is associate professor in the Departments of Occupational Therapy and Physical Medicine & Rehabilitation and a member of the graduate faculty of the School of Health and Rehabilitation Sciences at the University of Pittsburgh.

Dr. Skidmore’s NIH-funded research program examines the influences of cognitive impairments and mood symptoms on activities of daily living outcomes, and interventions designed to ameliorate these influences, focusing in two areas: interventions designed to improve rehabilitation outcomes for individuals with cognitive impairments after acquired brain injury (stroke, traumatic brain injury), and activities of daily living disability among community-dwelling older adults with Mild Cognitive Impairment and Major Depression Disorder. Dr. Skidmore has received over $2 million in funding.
In 1981, in the very first page of the very first issue of The Occupational Therapy Journal of Research (OTJR), Lela A. Llorens wrote that “The need for research in occupational therapy is based upon the need to know how occupation impacts the lives of clients as a result of treatment for restoration of function, habilitation or rehabilitation, and intervention for prevention of disability and maintenance of healthful function. The need for research in occupational therapy encompasses the need to discover and test the theories upon which professional practice is based.” She goes on to say that “OTJR will provide a forum for scholars to engage in vigorous discourse, to propose researchable theoretical issues, and to report completed theory based research.” In the next editorial, Wilma West added that OTJR will also be a place for interdisciplinary and collaborative research deemed necessary for the growth of occupational therapy. Since then, OTJR: Occupation, Participation and Health (as it is now known) has published over 800 articles from over 2,500 authors. Under the new leadership of Editor in Chief Dr. Sherrilene Classen, and working with Sage Publications, a leading international publisher of academic books and journals, OTJR will continue to seek innovative ways to provide timely reporting of advances in theory and practice. This peer-reviewed journal is highly respected and is now indexed in the NIH’s MEDLINE/PubMed database as well as other leading indexes in the social, behavioral, and biomedical sciences.

AOTF Scholarship Awards since 1965

INCLUDES STATE OT ASSOCIATION PARTNERS AND NAMED AND CORPORATE SCHOLARSHIP PARTNERS

TOTAL NUMBER OF SCHOLARSHIPS AWARDED 1,450

$1,316,646 TOTAL AMOUNT OF MONEY GIVEN
2014 Scholarship Recipients

**PROFESSIONAL DEGREE IN OCCUPATIONAL THERAPY**

North Coast Medical Scholarship
Caryn Brandel
Towson University
Keith Koppenhoefer
Touro College, New York

Kappa Delta Phi Scholarship
Samantha Lavach,
The Ohio State University
Reena Shah
Nova Southeastern University

Willard & Spackman Scholarship
Kate Ehlers
University of Wisconsin–Madison
Rachel Gillespie
University of New Mexico

The National Board for Certification in Occupational Therapy Endowed Scholarship
Angela Roberts
University of New Mexico
Virginia Chu
University of Illinois at Chicago

Doctorate in Occupational Therapy
Erica Frederick
The University of Toledo

Doctorate in Occupational Therapy
Daniel Fichter
University of the Sciences in Philadelphia

Renee Achter Memorial Scholarship
Casey Fish
Milligan College

Naida Ackley Memorial Scholarship
Julia Brunson
University of New Mexico

Mary Fiorentino Memorial Scholarship
Erin Buckley
University of Illinois at Chicago

Frank Oppenheimer Memorial Scholarship
Amanda Crowley
Springfield College

Janice McGraw Memorial Scholarship
Allison Crouch
Winston-Salem State University

The Network for Lesbian, Gay, Bisexual and Transgender Concerns in Occupational Therapy Endowed Scholarship
Michelle Dunn
Dominican College

AOTA Assembly of the Student Delegates (ASD) Scholarship
Crista Bush
University of Pittsburgh

The Martha Kirkland Pi Theta Epsilon Endowed Scholarship
Emily Demmler
Colorado State University
Jennifer Bush
Elizabethtown College

**ASSOCIATE’S DEGREE IN OCCUPATIONAL THERAPY**

Kappa Delta Phi Scholarship
Chelsea Kolarik
Sacramento City College

Carlotta Welles Scholarship
Conny Seay
Pueblo Community College

**AOTF – STATE ASSOCIATION SCHOLARSHIPS**

The Florence Wood Scholarship of the Arkansas Occupational Therapy Association
Haley Harris
University of Central Arkansas

The Adelaide Ryerson Smith Memorial Endowed Scholarship of the Arizona Occupational Therapy Association
Shira James
A.T. Still University of Health Sciences

The Florida Occupational Therapy Association Scholarship Honoring Myra McDaniel
Christen Fechtel
University of Florida

The Kansas Occupational Therapy Association Endowed Scholarship
Andrea Webber
Saint Louis University

The Karen Jacobs Scholarship of the Massachusetts Occupational Therapy Association
Associate’s Degree in Occupational Therapy
Melanie Glynn
Quinsigamond Community College

The Fred Sammons and Barbara Rider Endowed Scholarship of the Michigan Occupational Therapy Association
Erin Iacco
Western Michigan University

The Julia D. Sweeney/New Mexico Occupational Therapy Association Endowed Scholarship
Jennifer Hill
University of New Mexico

The New York State Occupational Therapy Association Endowed Scholarship
Marta Parys
Quinnipiac University
Associate’s Degree in Occupational Therapy
Katrina Nickerson
Jamestown Community College

The North Carolina Occupational Association Endowed Scholarship
Elizabeth Hart
University of North Carolina at Chapel Hill
Sara Hammond
University of North Carolina at Chapel Hill

Ruth Peterson Memorial Endowed Scholarship of the Kappa Chapter, Pi Theta Epsilon, University of North Dakota
Jamie Knudsvig
University of North Dakota
Taryn Wagner
University of North Dakota

continued on p.8
Award Winners

AOTF is proud of its 2014 award winners, each of whom exemplifies a commitment to occupational therapy research, leadership and education.

AOTF A. Jean Ayres Award
Dottie M. Ecker, MA, OTR/L, FAOTA
La Canada Flintridge, California
Susan H. Knox, PhD, OTR/L, FAOTA
Hollywood, California

AOTF Virginia Scardina Award of Excellence
Deborah Whitcomb, PhD, MBA, MS, OTR/L
Cincinnati Occupational Therapy Institute
Cincinnati, Ohio

AOTF Award for Community Volunteerism
Sandy Hanebrink, OTR/L
Anderson, South Carolina
Alexander Lopez, JD, OT/L
Touro College, Sayville, New York

AOTF Mary J. Bridle First Research Award
Beta Delta Chapter of Pi Theta Epsilon
Nova Southeastern University
Fort Lauderdale, Florida

AOTF Meritorious Service Award
Adam T. Drobot, PhD, Dallas, Texas

AOTF Leadership Service Commendation
Jane D. Acquaviva
Raleigh, North Carolina
Andrea R. Bilics, PhD, OTR/L, FAOTA
Worcester State University
Worcester, Massachusetts
Nancy Richman, OTR, FAOTA
Glantz/Richman Rehab Associates
Highland Park, Illinois
Jane Davis Rourk, OTR/L, BCP, FAOTA
Durham, North Carolina
Aaron Eakman, PhD, OTR/L
Colorado State University
Fort Collins, Colorado
Kim Schoessow, OTD, OTR/L
Frank Stein & Paul S. May Center for Low Vision Rehabilitation
San Francisco, California
Kari J. Tanta, PhD, OTR/L, FAOTA
Valleymedical, Renton, Washington
A New Constellation of Stars is Born: The AOTF Leaders & Legacies Society

The Leaders & Legacies Society seeks to identify, honor, and fully engage a cadre of occupational therapy professionals annually who have demonstrated their leadership abilities and skills through service in a variety of civic and professional organizations. This will create a broad community of established occupational therapy leaders who will support and promote the multifaceted mission of the Foundation through giving, mentoring, and volunteering for Foundation programs.

On April 17, 2015, AOTF will celebrate the founding members of the Leaders & Legacies Society during the AOTA Conference in Nashville. This dedicated group of over 140 visionary occupational therapy volunteers will undertake projects of importance to the AOTF mission in the coming year. Planned projects include efforts related to documenting occupational therapy’s history, advancing the AOTF scholarship program, and nominating prospective members.

The interim organizing leadership committee for the new society consists of Chair Ellen Kolodner and Vice Chair Ruth Schenm along with Teri Black, Christine Hischmann, Patricia Lavesser, Michael Pizzi, and Shirley Wells.

Five Decades of Direct Grant Support

(WITH SUPPORT FROM AOTA AND OTHER DONORS)

- 1965-1979: $23,000
- 1980-1989: $400,000
- 1990-1999: $1,100,000
- 2000-2014: $100,000
- 2014-2015: $634,818
The inaugural year of the St. Catherine Challenge saw eighteen occupational therapy programs accept the Alpha Delta (Pi Theta Epsilon chapter at St. Catherine University) challenge to raise money for AOTF research grants. These leading programs, now designated as the extraordinary eighteen, include: St. Catherine University, A.T. Still University, Boston University, Colorado State University, Creighton University, Florida International University, The Ohio State University, Sacred Heart University, San José State University, Thomas Jefferson University, University of Findlay, University of Minnesota, University of North Dakota, University of St. Augustine, University of Southern California, University of Wisconsin-LaCrosse, Virginia Commonwealth University, and Washington University in St. Louis. St Catherine University won the challenge and all together these schools raised more than twelve thousand dollars in only three months. The following schools have joined the challenge this year: Brenau University, College of St. Scholastica, Ithaca University, Rush University, Spalding University, University of Puget Sound, and The University of Toledo.

AOTF thanks all students who understand: Research Matters.

MAKE A GIFT
MAKE A DIFFERENCE

Consider making AOTF one of your philanthropic priorities and support the future of occupational therapy.

Gifts to AOTF help us continue our mission of advancing the science of occupational therapy.
Gifts can be made through our secure web site at www.aotf.org.

The American Occupational Therapy Foundation has planned giving options that help you tailor your gift of cash or other assets to suit your circumstances. Large or small, your bequest will make a difference; they are truly investments in the profession’s legacy. If you’d like to explore bequests to AOTF contact aotf@aotf.org.
Pi Theta Epsilon (PTE), established in 1958, is the national honor society for occupational therapists. From its first chapter at the University of New Hampshire, Pi Theta Epsilon has evolved into a nationally-recognized organization dedicated to stimulating, recognizing, and rewarding educational systems that support excellence in scholarship, research, and critical thinking in occupational therapy.

PTE began its relationship with AOTF in 1988. A period of growth followed and today, the total number of chapters is 105. PTE members continue their mission of supporting excellence by sponsoring scholarly and outreach occupational therapy activities at their respective universities and communities. Business meetings are held every year at the AOTA/NBCOT Student Conclave and in 2014, a PTE-sponsored poster session was also held. The President’s Award, (given annually to chapters that organize and implement outstanding scholarly activities) was awarded to Duquesne University’s Beta Theta chapter for their work in developing and implementing a journal club within their occupational therapy program.

The Wilma L. West Library
(A JOINT PROJECT WITH AOTA)

1,172 DOCTORAL DISSERTATIONS AND MASTER’S THESSES

3,373 BOOKS

36,476 JOURNAL AND NEWSPAPER ARTICLES

1,000 AUDIOVISUAL RESOURCES (PHOTOS, VIDEO)

1,096 PROCEEDINGS AND OTHER RESOURCES

VOLUME IV NO. 7

NEWS
BOARD OF DIRECTORS

As of October 1, 2014

Executive Committee
Diana L. Ramsay, Chair
Langhorne, Pennsylvania
Wendy J. Coster, Vice Chair
Boston, Massachusetts
Patricia Booth, Secretary
Chicago, Illinois
Martha Kirkland, Treasurer
Baltimore, Maryland

Directors
M. Carolyn Baum
St. Louis, Missouri
Mary Ellen Buning
Louisville, Kentucky
Alfred “Chip” J. Chiplin, Jr.
Washington, DC
Susan M. Fitzpatrick
St. Louis, Missouri
Mary Foto
Montecito, California
Emily Kringle
Minneapolis, Minnesota
Kinsuk K. Maitra
Miami, Florida
Jan Polgar
London, Ontario, Canada

Non-Voting Members
Virginia “Ginny” Stoffel
AOTA President
Milwaukee, Wisconsin
Amy J. Lamb
AOTA Vice President
Ypsilanti, Michigan
Charles H. Christiansen
AOTF Chief Executive Officer
Bethesda, Maryland

Honorary Life Members
Donald Lang
Nancy V. Liefiinck
Jane Davis Rourk
Fred Sammons

THE AOTF MISSION
The mission of AOTF is to advance the science of occupational therapy to support people’s full participation in meaningful life activities.

THE AOTF VISION
We envision a vibrant science that builds knowledge to support effective, evidence-based occupational therapy.

AOTF’S STRATEGIC GOALS

RESEARCH
To support initiatives that build research capacity and advance knowledge related to occupation, health, and well-being.

SUSTAINABILITY
To develop the financial and human resources necessary to pursue the vision and mission of the Foundation.

AWARENESS
To increase public and professional recognition of AOTF and its purposes and activities.
The American Occupational Therapy Foundation expresses sincere appreciation for the support provided by so many generous friends during fiscal year 2014 (October 1, 2013-September 30, 2014), including the American Occupational Therapy Association, whose members contribute to the Foundation through their annual AOTA membership dues.

### $10,000 and above
- National Board for Certification in Occupational Therapy
- North Coast Medical, Inc.
- Kathryn Reed
- Sharon G Ryan

### $5,000-$9,999
- Donald F Lang
- Kappa Delta Phi Sorority

### $2,500-$4,999
- Patricia Booth
- Mindy A Hecker
- Martha and JR Kirkland
- New Mexico OT Association
- Oklahoma OT Association
- Nancy Prendergast
- Sand Hill Global Advisors
- St Catherine University students

### $2,000-$2,499
- ASCOTA University of North Dakota
- Julie Bass
- M Carolyn Baum
- Dorothy Omori Bergeron
- Bette Bonder
- Jack Chris Bradberry
- Charles Christiansen
- Ellen S Cohn
- Cynthia F Epstein
- Mary Elizabeth Foto

### $1,000-$2,499
- ASCOTA University of North Dakota
- Julie Bass
- M Carolyn Baum
- Dorothy Omori Bergeron
- Bette Bonder
- Jack Chris Bradberry
- Charles Christiansen
- Ellen S Cohn
- Cynthia F Epstein
- Mary Elizabeth Foto

### $500-$999
- B Joan Bellman
- Ann Borreson
- Kristine L Haertl
- Eric James
- Marcia Kiehlhofer
- Virgil Mathiowetz
- Diana L Ramsay
- Retirement Research Foundation
- Jamille Segara
- Virginia C Stoffel
- University of Wisconsin - La Crosse students
- Washington University in St Louis students
- West Virginia OT Association

### $250-$499
- John P Hoyle
- Juergen Krohn
- St Louis students
- St Louis students
- St Louis students

### $100-$249
- Deborah A Whitcomb
- Ruth Ann and Tom Watkins
- USA SOTA
- Virginia Commonwealth University students
- Ruth Ann and Tom Watkins
- Deborah A Whitcomb

### Thank You

- Authors
- Contributors
- Donors
- Supporters
- Volunteers

---

**Securing the Future**

The American Occupational Therapy Foundation expresses sincere appreciation for the support provided by so many generous friends during fiscal year 2014 (October 1, 2013-September 30, 2014), including the American Occupational Therapy Association, whose members contribute to the Foundation through their annual AOTA membership dues.

- National Board for Certification in Occupational Therapy
- North Coast Medical, Inc.
- Kathryn Reed
- Sharon G Ryan

- Donald F Lang
- Kappa Delta Phi Sorority

- Patricia Booth
- Mindy A Hecker
- Martha and JR Kirkland
- New Mexico OT Association
- Oklahoma OT Association
- Nancy Prendergast
- Sand Hill Global Advisors
- St Catherine University students

- ASCOTA University of North Dakota
- Julie Bass
- M Carolyn Baum
- Dorothy Omori Bergeron
- Bette Bonder
- Jack Chris Bradberry
- Charles Christiansen
- Ellen S Cohn
- Cynthia F Epstein
- Mary Elizabeth Foto

- B Joan Bellman
- Ann Borreson
- Kristine L Haertl
- Eric James
- Marcia Kiehlhofer
- Virgil Mathiowetz
- Diana L Ramsay
- Retirement Research Foundation
- Jamille Segara
- Virginia C Stoffel
- University of Wisconsin - La Crosse students
- Washington University in St Louis students
- West Virginia OT Association

- John P Hoyle
- Juergen Krohn
- St Louis students
- St Louis students
- St Louis students

- Deborah A Whitcomb
- Ruth Ann and Tom Watkins
- USA SOTA
- Virginia Commonwealth University students
- Ruth Ann and Tom Watkins
- Deborah A Whitcomb

- Authors
- Contributors
- Donors
- Supporters
- Volunteers
The American Occupational Therapy Foundation has made every effort to provide a complete and accurate report recognizing our donors. If we have made an error, please notify us at aotf@aotf.org. Please also write us if you wish to have your name removed from receiving future fundraising efforts.
2014 Financial Highlights

Revenues and expenses incurred in supporting our profession through scholarships, research support and publications, development and recognition of leadership, education and maintenance of the largest collection of occupational therapy resources in the country. The AOTF is a 501(c)(3) organization, Federal Tax I.D. # 136189382.

In 2014, the Foundation incurred expenses in the following programmatic categories:

**PROGRAM EXPENSES**

<table>
<thead>
<tr>
<th>Category</th>
<th>2014</th>
</tr>
</thead>
<tbody>
<tr>
<td>Research</td>
<td>$542,229</td>
</tr>
<tr>
<td>Education</td>
<td>$351,511</td>
</tr>
<tr>
<td><strong>Total Program Services</strong></td>
<td><strong>$893,740</strong></td>
</tr>
</tbody>
</table>

**SUPPORT SERVICES**

<table>
<thead>
<tr>
<th>Category</th>
<th>2014</th>
</tr>
</thead>
<tbody>
<tr>
<td>General and administration</td>
<td>$276,466</td>
</tr>
<tr>
<td>Marketing and development</td>
<td>$246,334</td>
</tr>
<tr>
<td><strong>Total Support Services</strong></td>
<td><strong>$522,800</strong></td>
</tr>
</tbody>
</table>

**Total Expenses**

<p>| | |</p>
<table>
<thead>
<tr>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Total Expenses</strong></td>
<td><strong>$1,416,540</strong></td>
</tr>
</tbody>
</table>

**STATEMENT OF FINANCIAL POSITION SEPTEMBER 30, 2014**

**ASSETS**

<table>
<thead>
<tr>
<th>Description</th>
<th>FY2014</th>
</tr>
</thead>
<tbody>
<tr>
<td>Cash and Cash Equivalents</td>
<td>$72,800</td>
</tr>
<tr>
<td>Inventory</td>
<td>$61</td>
</tr>
<tr>
<td>Prepaid Expenses and Other Assets</td>
<td>$13,082</td>
</tr>
<tr>
<td>Interest Receivable</td>
<td>$25,861</td>
</tr>
<tr>
<td>Contributions Receivable, Net Current</td>
<td>$1,500</td>
</tr>
<tr>
<td>Due from AOTA</td>
<td>$55,760</td>
</tr>
<tr>
<td>Investments</td>
<td>$23,426,009</td>
</tr>
<tr>
<td>Beneficial Interest in Remainder and Perpetual Trusts</td>
<td>$2,306,769</td>
</tr>
<tr>
<td>Cash Surrender Value of Life Insurance, Net</td>
<td>$6,679</td>
</tr>
<tr>
<td>Property and Equipment, Net</td>
<td>$32,402</td>
</tr>
<tr>
<td><strong>Total Assets</strong></td>
<td><strong>$25,966,184</strong></td>
</tr>
</tbody>
</table>

**LIABILITIES AND NET ASSETS**

<table>
<thead>
<tr>
<th>Description</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Accounts Payable and Accrued Expenses</td>
<td>$116,541</td>
</tr>
<tr>
<td>Liability for Future Interest in Pooled Income Fund</td>
<td>$1,492</td>
</tr>
<tr>
<td>Capital Lease Obligation Total</td>
<td>$17,606</td>
</tr>
<tr>
<td><strong>Total Liabilities</strong></td>
<td><strong>$140,402</strong></td>
</tr>
</tbody>
</table>

**NET ASSETS**

<table>
<thead>
<tr>
<th>Description</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Unrestricted:</td>
<td></td>
</tr>
<tr>
<td>Undesignated</td>
<td>$17,615,074</td>
</tr>
<tr>
<td>Board-designated Quasi-endowment Funds</td>
<td>$456,876</td>
</tr>
<tr>
<td>Total Unrestricted Net Assets</td>
<td>$18,071,950</td>
</tr>
<tr>
<td>Temporarily Restricted</td>
<td>$657,652</td>
</tr>
<tr>
<td>Permanently Restricted</td>
<td>$7,096,180</td>
</tr>
<tr>
<td><strong>Total Net Assets</strong></td>
<td><strong>$25,825,782</strong></td>
</tr>
</tbody>
</table>

**Total LIABILITIES and NET ASSETS**

<p>| | |</p>
<table>
<thead>
<tr>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Total LIABILITIES and NET ASSETS</strong></td>
<td><strong>$25,966,184</strong></td>
</tr>
</tbody>
</table>

Copies of the complete audit report prepared by CliftonLarsonAllen, LLP may be obtained by writing to AOTF at 4720 Montgomery Lane, Bethesda, MD 20814.