Annual Report 2001
The American Occupational Therapy Foundation
The American Occupational Therapy Foundation

Exploring the Relationship between Occupation and Health

The Foundation’s Mission

Through the use of its fiscal and human resources, the American Occupational Therapy Foundation works to expand and refine the body of knowledge of occupational therapy and promote understanding of the value of occupation in the interest of the public good.

The Foundation’s Vision

AOTF promotes a society in which individuals, regardless of age or ability, may participate in occupations of their choice that give meaning to their lives and foster health and well-being. Through its dedication to scientific inquiry, education and leadership development, the Foundation pays tribute to the significance of everyday activities in enabling those who face personal challenges to realize their full potential.
Chartered in 1965 as a 501 (c)(3) charitable, nonprofit organization, the American Occupational Therapy Foundation (AOTF) actively solicits tax-deductible contributions to support a broad range of initiatives that promote education and research to advance excellence in occupational therapy. Visit the AOTF website at www.aotf.org to learn more about the services and programs the Foundation offers on behalf of the profession.
President’s Message

On behalf of the Board of Directors of the American Occupational Therapy Foundation, I would like to thank our many friends and colleagues whose generosity was invaluable in helping us achieve our goals on behalf of the profession. Working together, we create rich opportunities for occupational therapy through education and research.

Our lives were forever changed in September 2001. The power of occupation may never have been more apparent than when we were challenged to move forward in the wake of September 11th. The Foundation reacted quickly with a new initiative launched by its Institute for the Study of Occupation and Health. This initiative is only one of the Foundation’s many contributions to promote relevance of occupation to the health of individuals, families, and communities.

The progress of the past year would not have been possible without the continuing support of the over 42,000 donors including the membership of the American Occupational Therapy Association. Thank you for making 2001 another banner year for the programs and initiatives of the Foundation.

With great appreciation,

Jane Davis Rourk, OTR/L, BCP, FAOTA
President
During the past year, AOTF launched its Institute for the Study of Occupation and Health to serve as the umbrella for the Foundation’s programs and services that support occupational therapy research and education. The Institute offers dynamic means through which the Foundation disseminates information, documents the effectiveness of occupational therapy practice, and supports graduate education.

Disseminating Information . . .

**AOTF Task Force on Occupation in Societal Crises** helps people deal with the cumulative and pervasive effects of fear and loss associated with stressful events such as September 11th. Articles written for both the popular and professional press seek to increase understanding of how participation in occupations can restore and maintain a healthy balance in life and reduce the devastating effects of post-traumatic stress.

**OTJR: Occupation, Participation and Health**, the Foundation’s completely redesigned research journal, focuses on the role occupation plays in promoting or restoring health and in fostering full participation in family, work, and the community. This quarterly journal will provide a forum for the growing cadre of occupational scientists from multiple disciplines to discuss and share their research results.

**The Wilma L. West Library** houses an extensive collection on the study of occupation and the practice of occupational therapy. Its resources include publications from the early 1900’s to the present, unpublished materials,
doctoral dissertations, and master’s theses. Patrons can browse the catalog or search the occupational therapy literature using OTSEARCH, the profession’s on-line database of 33,400 records. In 2001, library staff provided reference services and literature searches for over 2,700 individuals and filled 350 interlibrary loan requests.

**AOTF Resource Notes** offer insights into occupation as it relates to current societal issues. The Notes draw from a broad spectrum of contemporary sources and include citations, abstracts, and links to related websites. Interested parties may use the Resource Notes to further their exploration of the featured topics. The Resource Note is posted to the AOTF website, www.aotf.org, and distributed by email.

**Advancing Practice . . .**

The Center for Outcomes Research and Education at the University of Illinois at Chicago (CORE) has achieved an impressive return on the investment of AOTA, AOTF, and its corporate partner, Smith & Nephew–Rehabilitation Division to document the effectiveness of occupational therapy. Two years into its three-year contract, 19 CORE fellows received over $8.7 million in external funding to conduct 28 occupational therapy outcome studies. The topics range from universal design to domestic violence. CORE fellows serve as role models and mentors in advancing occupational therapy practice through outcomes research. Visit www.uic.edu/ahp/OT to learn more about CORE.

“Understanding Habits in Context” was the second research conference sponsored by AOTF with funding from the RGK Foundation and the National Center for Medical Rehabilitation Research at the National Institutes of Health. More than 70 scholars from twelve disciplines debated the meaning and implications of habits for health and the social policies that support or detract from the effectiveness of habits. Proceedings of this conference were published as a supplement to the Winter 2002 issue of OTJR: Occupation, Participation and Health.
Supporting Education . . .

**Regional Education Workshop Series** was designed by AOTF in collaboration with AOTA and the Accreditation Council for Occupational Therapy Education to assist occupational therapy educators in their transition to post-baccalaureate professional entry. The workshops include concepts of graduate education, strategies for faculty development and methods for integrating research, evidence-based practice, and non-traditional fieldwork experiences. To date, 145 academic and clinical faculty members from 21 occupational therapy programs have participated in revising and adapting their curriculum designs.

**Research Across the Curriculum: A Guide for Occupational Therapy Educators**, a recently released monograph edited by Elizabeth Crepeau, describes how faculty can incorporate research-related topics into occupational therapy curricula. This is a valuable resource for educators as they prepare to meet the profession’s revised accreditation standards. This publication may be purchased on-line via the Foundation website, www.aotf.org.

**Mentoring in Curriculum Development**, a pilot study sponsored by the Foundation, examines the effects of a mentoring process in changing curriculum structure and developing scholarly communities. Five schools, selected for their potential to produce the next generation of educators and scholars, are working with curriculum mentors to explore innovative and flexible strategies that support graduate education.

**Doctoral Network** proudly stands at 631 members. Through the Foundation’s web site, members may locate colleagues in the directory, access the list of doctoral dissertations in the library’s collection, and receive the Foundation’s weekly Resource Note.

Post Professional Graduate Study in Occupational Therapy
- Willard and Spackman Memorial Scholarship—$2000
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Post Professional Graduate Study in a Related Field
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- Mary Fiorentino Memorial Scholarship—$2000
  Wendy Hildebrand, University of Kansas

Professional Master’s Degree Study
- Kappa Delta Phi Scholarships—$1000 each
  Oscar Vallejo, University of Southern California
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- AOTF Endowment Scholarships—$500 each
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Baccalaureate Degree Study

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- Ruth Peterson Memorial Scholarship of the Pi Theta Epsilon Kappa Chapter—$375
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Associate Degree Study

- Carlotta Welles Scholarship—$500
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State Occupational Therapy Association Scholarships
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Jenny Allard, Concordia University, Wisconsin
The Board of Directors and staff express sincere appreciation to those who supported the Foundation during the 2001 fiscal year, including the 41,000 AOTA members who contribute to AOTF through their annual AOTA membership dues. Tax-deductible donations and in-kind gifts enable AOTF to expand its efforts to create new opportunities for research and education.

We invite you to join the Foundation’s family of donors. You may make a donation using the secure contribution form available through the AOTF website at: www.aotf.org. Or, you may contact AOTF directly at 301.652.6611, Extension 2556.

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**October 1, 2000 to September 30, 2001**

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Gail Polkinghorne
Dianne Poisson
Ann Powell
Martha Powell
Nancy Powell
Antje Price
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$25 to $49

Sarah Aarons | Bryan Wodaski | Leah Winkler | Shana Azevedo |
Christine Abbott | Jennifer Womack | Vladimir Wodaski | Saima Azhar |
Judith Abe | Lawrence Zachow | Myriam Bagalay | Stephanie Baars |
Ishibashi | Pauline Zangrillo | Shah Bagar | Susan Bach |

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Ishibashi | Sunayna Agrawal | Lisa Ahlberg | Adetutu Balogun |

Sally Abruzzese | Michael Accardi | Leslie Acevedo | Racquel Balsamo |
Christine Achenbach | Christine | Angela Bates | Megan Banahan |
Corrine Ackman | Mary Alexander | Christiane Butter | Katherine Bangsund |
Kathie Alexander | Mary Alexander | Shana Azevedo | Amy Banka |

Sue Alexander | Mary Alexander | Sarah Alexander | LaDonna Bannach |

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Dolores Harris      Li Hong               Ericka Jones         Sara Koenigsfeld
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Cheryl Mullins
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Colleen Munger
Cathy Munro
Erin Murakami
Denise Murphy
Erlin Murphy
Julia Murray
Mary Murray
Allison Muxlow
Allison Myers
Preeta Nair
Kaori Nakamura
Michael Nardone
Edna Naxon

Laurie Nedved
Kristin Nelson
Barbara Neuhaus
Robynne Neuhaus
Donald Newkirk
Maryann Nicholas
Kathryn Nieman
Ingrid Nilsson
Linda Nobles
Sandra Noffke
Janet Nord
Peter Nordland
Kara Norton
Sarah Norton
Patricia Nowak
Lisa O'Connor
Elizabeth Oakes
Danielle O'Connell
Jane Olson
Debbie Olton
Christine Olwell
Michelle Onoda
Karim Opacich
Joanne Oppermann
Kaylie Orr
Jamiie Orrange
Kenneth

Ottenbacher
Cheryl Otto
Monica Owen
April Owenby
Pamela Pagulo
Laura Paisley

Magdalena Panscik
Alice Pappagianis
Karen Park
Dawn Parker-Korinek
Barbara Parman
Raine Pass
Deanna Pate
Seena Patel
Joanna Patton
Dana Patzer
Julie Paull
Nell Paxton
Tara Peacock
Sharon Peddie
Lorraine Peddetti
Charlane Pehoski
Neil Penny
Monica Perlmutter
Dayle Peterson
Quynh Pham
Georgia Phelps
Jan Phillips
Kelley Phillips
Kristin Phillips
Shawn Phipps
Ilana Picker
Barbara Piel
Rose Pierre-Louis
Connie Piper
Lacie Pitchford
Katie Pitt
Emily Pittard
Jan Pittard
Melba Pittard
Chris Pfeifer
Shelley Fletcher
Hermine Plotnick
Barbara Pluta
Christina Poirier
Patricia Polclym
Orietta Poll
Carol Poncirolli
Ann Popper
Mary Porcella
Helen Posatery
Melanie Potanko
Tonya Powers
Doris Prado
Shari Pratt
Vicky Presnell
Jamie Price
Melissa Price
Susan Price

Susan Pristas
Crystal Prunier
Kim Pulley
Lisa Purrehage
Mary Quane Marsh
Kristin Quinn
Terri Rabbeth
Aimee Rackliffe
Denise Radomile
Maryann Radowski
Christopher Raehle
Lisa Ralph
Helen Ransammy
Ruth Ramsey
Nicoie Randazzo
Cheryl Rankin
Tricia Rasch
Ruthann Ratcliff
Rebecca Raymond
Jennifer Rea
Catherine Rebelea
Renee Redfern
Carol Reed
Abby Reese
Carrie Register
Linda Reiser
Stacey Rendall
Gretchen Rens
Bess Repshu
Michele Requena
Deborah Resman
Jessica Reynolds
Karen Rhyndar
Marissa Ribak
Mary Rice
Julie Richard
Linda Richardson
Gail Richert
Diana Riggs
Kristen Riker
Mary Theresa Riley
Brooken Ringo
Karen Rittenhouse
Mark Ritter
Mary Ellen Rittle
Elizabeth Roarty-O'Herron
Dawn Robbins
Jennifer Robbins
Lisa Roberson
Duane Roberts
Laurie Robins

Elizabeth Robinson
Mary Robinson
Tamara Robinson
Kristin Rodgers
Melina Rodriguez
Stephen Rodriguez
Dana Rogers
Susan Rogowski
Shawn Roll
Trerie Roney
Mary Rooney
Diana Rose
Lauren Rosenberg
Andrea Rosenblume
Jessic Rossof
Mildred Ross
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Elizabeth Rowland
Brenda Rowlett
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Lynn Rucka
Megan Ruckle
Lyndsey Rupert
Elizabeth Russel
Gail Ruth
Debra Rybski
Amy Saba
Maryann Sacco-Petersen
Stacey Sackenheim
Ann Sacks
Jasna Sadikovic
Melissa Salement
Claire Salmont
Holly Sanders
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M. Sanders
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Andria Scalise
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<th>Name</th>
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<td>Shirley Zurchauer</td>
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</table>

*It is our intention to recognize all fiscal year 2001 donors in this listing. If we have inadvertently omitted your name or placed you in an incorrect giving category, please call AOTF at 301-652-6611, Extension 2556.*
Stewardship and Accountability
Fiscal Year 2001

AOTF closed the fiscal year on September 30, 2001 amid financial turbulence. Net assets at the close of FY 2000–2001 were $10,820,400 as compared with $11,945,535 at the close of the prior year. The tragic events of September 11th had a significant impact on the value of the Foundation’s investments at the close of the fiscal year. The decline in net assets is attributable in large measure 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 $715,620, including $111,320 from AOTA 2% transfers. Programmatic and operating expenses were $1,159,583. Total losses on marketable securities were $681,172 resulting in a decline in net assets for FY 2000-2001 of $1,125,135.

In FY 2000–2001 the Foundation incurred expenses in the following programmatic categories:

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<th>PROGRAM EXPENSES</th>
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<tr>
<td>Research</td>
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<tr>
<td>Education</td>
<td>344,797</td>
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<td>Scholarships</td>
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<td><strong>Total</strong></td>
<td><strong>671,263</strong></td>
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<th>SUPPORT SERVICES</th>
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<td>Administration and general</td>
<td>313,358</td>
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<tr>
<td>Marketing and development</td>
<td>174,962</td>
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<tr>
<td><strong>Total</strong></td>
<td><strong>488,320</strong></td>
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**$ 1,159,583**
The following Balance Sheet is an excerpt from the unqualified, external audit of the AOTF Financial Statements for FY 2000-2001 performed by Bond Beebe Certified Public Accountants. AOTF is in full compliance with accounting methods and standards for nonprofit organizations. Copies of the complete audit report may be obtained by writing to AOTF at 4720 Montgomery Lane, P.O. Box 31220, Bethesda, Maryland 20824-1220.

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<th>ASSETS</th>
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<td>CURRENT ASSETS</td>
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<td>Cash and cash equivalents</td>
<td>$304,282</td>
<td>$138,034</td>
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<td>Contributions receivable</td>
<td>49,975</td>
<td>171,551</td>
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<td>Pamphlets and pins</td>
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<td>2,710</td>
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<td>Other receivables and prepaid expenses</td>
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<td>443</td>
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<td><strong>Total Current Assets</strong></td>
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<td><strong>312,738</strong></td>
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<td>MARKETABLE SECURITIES</td>
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<td>U.S. government securities</td>
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<td>50,250</td>
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<td>Corporate bonds</td>
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<td>Common stocks</td>
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<td><strong>Total Marketable Securities</strong></td>
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<td><strong>2,355,002</strong></td>
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<td>SPLIT-INTEREST GIFTS</td>
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<td>Pooled income fund</td>
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<td>1,067,337</td>
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<td>8,622,494</td>
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<td><strong>Total Split-Interest Gifts</strong></td>
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<td><strong>9,789,372</strong></td>
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<td>FIXED ASSETS</td>
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<td>Net of accumulated depreciation of $63,134 and $55,612</td>
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<td>16,002</td>
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<tr>
<td><strong>Total Fixed Assets</strong></td>
<td><strong>23,829</strong></td>
<td><strong>16,002</strong></td>
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<td>OTHER ASSETS</td>
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<td>Contributions receivable</td>
<td>73,779</td>
<td>187,869</td>
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<td>Cash surrender value of life insurance (net of related policy loans of $219,640 and $210,139)</td>
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<td>36,836</td>
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<td>Due from affiliate—research contract</td>
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<td><strong>Total Other Assets</strong></td>
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<td><strong>248,176</strong></td>
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<td>TOTAL ASSETS</td>
<td><strong>$11,473,926</strong></td>
<td><strong>$12,721,290</strong></td>
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</tbody>
</table>

| LIABILITIES AND NET ASSETS | | |
| LIABILITIES | | |
| Accounts payable and accrued expenses | $40,876 | $38,903 |
| Due to affiliate | 139,935 | 185,527 |
| Liability under unitrust agreement | 317,256 | 343,434 |
| Liability for future interest in pooled income fund | 30,567 | 30,563 |
| Line of credit | - | 58,400 |
| Deferred compensation | 113,030 | 98,875 |
| Other | 11,862 | 20,353 |
| **Total Liabilities** | **653,526** | **775,755** |
| NET ASSETS | | |
| Unrestricted | (147,666) | 682,245 |
| Temporarily restricted | 1,229,591 | 1,343,410 |
| Permanently restricted | 9,738,475 | 9,919,880 |
| **Total Net Assets** | **10,820,400** | **11,945,535** |
| TOTAL LIABILITIES AND NET ASSETS | | |
| **$11,473,926** | **$12,721,290** |
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2000-2001

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Jane Davis Rourk

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Ann P. Grady

Secretary
Donald Lang

Treasurer
Leopold Selker

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William Farland
John Hockenberry
Nancy Talbot
Ruth Ann Watkins
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Chair
Research Advisory Committee

Martha Kirkland
AOTF Executive Director

Barbara Kornblau
AOTA President

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Carlotta Welles

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AOTA Executive Director

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Bond Beebe, A Professional Corporation
Certified Public Accountants
Alexandria, Virginia

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Steve Wilburn
Morgan Stanley Dean Witter
Pasadena, California

Financial Advisor
Patrick J. McGinn, CPA
Chartered
Gaithersburg, Maryland

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Martha Kirkland

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