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

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

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

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

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

The strengths, talents, knowledge, and experience of volunteers and the AOTF staff allow us to gain the maximum benefit from every dollar. We are extremely fortunate to have 35,000 donors, including AOTA members, as our supporters. We consider every donor a partner in meeting the challenges of the Foundation, particularly as we face the lingering effects of a depressed economy.

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

With great appreciation,

Ruth Ann Watkins, President

Leveraging Dollars to Benefit Society . . .

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

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

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

Advancing Occupational Therapy Practice . . .

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

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

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

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

Disseminating Information . . .

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

The Wilma L. West Library has global reach and influence. The library houses a comprehensive collection of professional literature and documents. It is the premier source of information about the effects of occupation and occupational therapy on health. During 2003, staff filled over 1,500 requests and shared its collection through interlibrary loans with over
70 libraries across the United States, Canada, and the United Kingdom. OT SEARCH is the profession’s largest and most comprehensive online database and is jointly sponsored by AOTF and AOTA. Educators, researchers, students, and practitioners who subscribe to OT SEARCH have access to over 38,000 citations including contemporary publications, dissertations and theses, and archival resources.

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

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

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

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

Scholarships are awarded each year to students in accredited occupational therapy programs in the United States. Funds from the AOTF Endowment, corporate gifts, the Association of Student Delegates, state occupational therapy associations, and Kappa Delta Phi Sorority make these scholarships possible. AOTF congratulates the following recipients of scholarships awarded in 2003.

2003 Scholarship Recipients

DOCTORAL DEGREE IN OCCUPATIONAL THERAPY

North Coast Medical Scholarship—$5,000
- Marcella McGee
  Creighton University

MASTER’S DEGREE IN OCCUPATIONAL THERAPY

North Coast Medical Scholarship—$5,000
- Joanna Spangenberg
  San Jose State University

Carolyn Kohn Memorial Scholarship—$2,000
- Stacey Markham
  New York University

Willard and Spackman Memorial Scholarship—$2,000
- Mary Overman
  Virginia Commonwealth University

Kappa Delta Phi Scholarships—$2,000 each
- Erica Ahlgren
  St. Ambrose University
- Julie Bezold
  University of Tennessee

Janice McGraw Memorial Scholarship—$1,000
- Beth Martin
  Belmont University

Assembly of Student Delegates Scholarship, formerly ASCOTA—$450
- Briana Rusiski
  University of Pittsburgh

ASSOCIATE DEGREE IN OCCUPATIONAL THERAPY

Carlotta Welles Scholarship—$500
- Emily Simpson
  Cabarrus College of Health Sciences

Kappa Delta Phi Scholarships—$500 each
- Cynthia Griffith
  Lake Michigan College
- Luz Rodriguez
  LaGuardia Community College

STATE OCCUPATIONAL THERAPY ASSOCIATION SCHOLARSHIPS

Arizona Occupational Therapy Association—$1,000
- Sara Treanor
  Midwestern University

The Florence Wood Scholarship of the Arkansas Occupational Therapy Association—$500
- Kelley Lewis
  University of Central Arkansas

Kansas Occupational Therapy Association—$500 each
- Alyson Pleviak
  University of Kansas Medical Center

Baccalaureate Degree in Occupational Therapy
- Sarah Johnston
  Newman University
-
The Jean Steffan Smith Memorial Scholarship of the Kentucky Occupational Therapy Association—$500

Baccalaureate Degree in Occupational Therapy

- Julia Rust-Jones
  Eastern Kentucky University

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

Master's Degree in Occupational Therapy

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

Michigan Occupational Therapy Association—$500

Baccalaureate Degree in Occupational Therapy

- Megan Anderson
  Western Michigan University

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

Master's Degree in Occupational Therapy

- Meaghan Reilly
  University of New Hampshire

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

Master's Degree in Occupational Therapy

- Nancy Rawcliffe
  University of New Mexico

New York Occupational Therapy Association—$1,000 each

Master's Degree in Occupational Therapy

- Judith Lapidus
  Columbia University
- Rozi Weinberg
  Touro College

Baccalaureate Degree in Occupational Therapy

- Leslie Meistrich
  Keuka College

North Carolina Occupational Therapy Association—$300

Master's Degree in Occupational Therapy

- Rebecca Iverson,
  University of North Carolina at Chapel Hill

Ohio Occupational Therapy Association—$1,000

Master's Degree in Occupational Therapy

- Lori Dallacheisa
  University of Findlay

Oklahoma Occupational Therapy Association—$500

Master's Degree in Occupational Therapy

- Callie Acree
  University of Oklahoma Health Sciences Center

Oregon Occupational Therapy Association—$500

Associate Degree in Occupational Therapy

- Donna Remmick
  Mount Hood Community College

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

Baccalaureate Degree in Occupational Therapy

- Alisha Kowalecki
  Duquesne University

Rhode Island Occupational Therapy Association—$1,000

Associate Degree in Occupational Therapy

- Courtney Crone
  New England Institute of Technology

Texas Occupational Therapy Association—$1,000

Master's Degree in Occupational Therapy

- Leyla Hedayati
  Texas Woman's University

Utah Occupational Therapy Association—$350

Master's Degree in Occupational Therapy

- Amy Nielsen
  University of Utah

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

Master's Degree in Occupational Therapy

- Diana Carter
  West Virginia University
Securing the Future

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

CORPORATE AND ORGANIZATIONAL CONTRIBUTORS
October 1, 2002 – September 30, 2003

**Sponsor $10,000 and above**

- CHICO'S Marsh Affinity Group Services
- North Coast Medical

**Partner up to $10,000**

- Bristol-Myers
- Squibb
- FBA
- The Haworth Press
- Wisconsin Occupational Therapy Association
- AOTF Connection Special Edition

**Benefactor**

- Fred Sammons

**2003**

**Kappa Chapter of Pi Theta Epsilon at University of North Dakota**

**Kappa Delta Phi Sorority**

**Occupational Therapy Consultants Retirement Foundation Foundation SLACK**

South Carolina Occupational Therapy Assoc.

**Occupational Therapy Skill Builders**

West Virginia Occupational Therapy Assoc.

**Wisconsin Occupational Therapy Association**

**INDIVIDUAL CONTRIBUTORS**

October 1, 2002 – September 30, 2003

**$5,000 – $9,999**

- Donald Lang

- Diana Ramsay
- Barbara Rider
- Sophia Rydin
- Jim Sam
- Julie Shaperman
- Sarah Snyder
- Lorienne Watson
- Sonya Zimmerman

**$1,000 – $2,499**

- Dorothy Bergeron
- Robert Bing
- Ellen Cohn
- Florence Cromwell
- Elizabeth DeVries
- Cynthia Epstein
- Ann Girty
- Mary Hager
- Marilyn Hennessey
- Mike Irwin
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- Aimee Luebben
- Molly O'Dell
- Jane Davis Rourke
- Nancy Snyder
- Ginny Stoffel
- Nancy Talbot
- Steve Wilburn

**$500 – $999**

- Barbara Banus
- Gail Fedler
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- Deborah Labovitz
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- Gayle Smith
- Lyfa Spelbring
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**$250 – $499**

- Andrea Bilics
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- Mark and Janine Drechsel
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- Mary Evert
- Robert Fab
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- Tari HengveId
- Elizabeth Herberger
- Irene Henden
- Ann Fighth
- Christine Hischman
- Laura Hoffman
- Margo Holm
- Stephanie Hoover
- Helen Hopkins
- Anne Hull
- A. Joy Hoss
- Janet Huxton
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- Satoru Inatsu
- Jeanne Jackson
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- Darrell Jacobs
- Margo Johnson
- Margaret Jolly
- Mary Noes
- Charlotte Roye
- Jacqueline Ryan
- Sharon Ryan
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- Joan Grebe
- Ellen Greenhalgh
- Anna Gregory
- Jennifer Griffin
- Lou Ann Griswold
- Patricia Gronak
- Mary Grome-

**$25,000 and above**

- Fred Sammons

- Anonymous Benefactor
Stewardship and Accountability Fiscal Year 2003

AOTF closed the fiscal year on September 30, 2003. Net assets at the close of FY 2002–2003 were $9,853,273 as compared with $10,486,285 at the close of the prior year. The decline in net assets is attributable to realized and unrealized losses on marketable securities held in the Foundation’s investment portfolio, as well as in split interest/irrevocable trusts managed by other institutions on behalf of AOTF.

Revenue for the year was $188,007 including $108,154 from AOTA 2% transfers representing AOTA members’ contributions. Programmatic and operating expenses were $651,136. Total losses on marketable securities were $855,352 resulting in a decline in net assets for FY 2002–2003 of $633,012.

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

Program Expenses

<table>
<thead>
<tr>
<th>Category</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>Research</td>
<td>$81,403</td>
</tr>
<tr>
<td>Education</td>
<td>256,201</td>
</tr>
<tr>
<td>Scholarships</td>
<td>36,250</td>
</tr>
<tr>
<td>TOTAL</td>
<td>$373,854</td>
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</tbody>
</table>

Support Services

<table>
<thead>
<tr>
<th>Category</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>Administration and General</td>
<td>306,182</td>
</tr>
<tr>
<td>Marketing and Development</td>
<td>210,883</td>
</tr>
<tr>
<td>TOTAL</td>
<td>$517,065</td>
</tr>
</tbody>
</table>

TOTAL $890,919

CORPORATE LEADERSHIP COMMITTEE

Chairman, Don Lang, AOTF Board Member

John Bardi, Director
Neuroscience Advocacy and Policy Development
Bristol-Myers Squibb

Mori MacKenzie, Executive Vice President
CHICO’S

Ed Eckenhoff, President and CEO
National Rehabilitation Hospital

Partie Moore, President
Moore Design Associates

Karen Jacobs, Associate Professor
Boston University

Dan Ryan, President and CE
BCS Financial Corporation

Sharon Ryan, AOTF Board Member

We invite you to join the Foundation’s family of donors. You may make a donation using the secure contribution form available through the AOTF website at www.aotf.org or you may contact AOTF directly at 301-652-6611, ext. 2552.

It is our intention to recognize all fiscal year 2003 donors of $25 and over in this listing. If we have inadvertently omitted your name or placed you in an incorrect giving category, please call AOTF at 301-652-6611, Extension 2552.

Stephanie
Proctor-Tollison
Sandra Purvis
Cordelia
Purkammer
Joan Quinn
Marie Quirion
Marcia Raffel
Mary Raley
Katherine
Rammel
Ruth Ramsey
Carol Reed
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Madelyn
Silverman
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Dawn Skiles
Ann Skinner
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Susanne Smith-Roley
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Artene Taros
Allison Taylor
Cheryl Taylor
Cynthia Taylor
Maryann Taylor
Beverly Thorn
Joyce Titus
Christina Torcson
Barbara
Tourkelott
Theresa Tovey
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Sally Townsend
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Janet Tredwell
Kelli Tretter
Willinda Truitt-Brown
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A. Umbarger
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Susan Young
Mervyn
Lee Warneke
Zachow
Debra Ziegler
Tracy Zinser-Bourne

Sharon Ryan, AOTF Board Member
## ASSETS

### CURRENT ASSETS

<table>
<thead>
<tr>
<th>Item</th>
<th>2003</th>
<th>2002</th>
</tr>
</thead>
<tbody>
<tr>
<td>Cash and cash equivalents</td>
<td>$ 282,982</td>
<td>$ 360,188</td>
</tr>
<tr>
<td>Contributions receivable</td>
<td>246,299</td>
<td>48,230</td>
</tr>
<tr>
<td>Pamphlets and pins</td>
<td>2,725</td>
<td>4,133</td>
</tr>
<tr>
<td>Other receivables and prepaid expenses</td>
<td>29,643</td>
<td>7,368</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td><strong>561,649</strong></td>
<td><strong>419,919</strong></td>
</tr>
</tbody>
</table>

### MARKETABLE SECURITIES

<table>
<thead>
<tr>
<th>Item</th>
<th>2003</th>
<th>2002</th>
</tr>
</thead>
<tbody>
<tr>
<td>Corporate bonds</td>
<td>396,374</td>
<td>429,434</td>
</tr>
<tr>
<td>Common stocks</td>
<td>1,023,974</td>
<td>853,482</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td><strong>1,420,348</strong></td>
<td><strong>1,282,916</strong></td>
</tr>
</tbody>
</table>

### SPLIT-INTEREST GIFTS

<table>
<thead>
<tr>
<th>Item</th>
<th>2003</th>
<th>2002</th>
</tr>
</thead>
<tbody>
<tr>
<td>Pooled income fund</td>
<td>101,717</td>
<td>102,527</td>
</tr>
<tr>
<td>Charitable remainder unitrust</td>
<td>760,788</td>
<td>647,609</td>
</tr>
<tr>
<td>Charitable remainder trusts</td>
<td>6,975,515</td>
<td>7,966,018</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td><strong>7,838,020</strong></td>
<td><strong>8,716,154</strong></td>
</tr>
</tbody>
</table>

### FIXED ASSETS

"Net of accumulated depreciation of $75,558 and $69,626"

<table>
<thead>
<tr>
<th>Item</th>
<th>2003</th>
<th>2002</th>
</tr>
</thead>
<tbody>
<tr>
<td>9,633</td>
<td>16,423</td>
<td></td>
</tr>
</tbody>
</table>

### OTHER ASSETS

<table>
<thead>
<tr>
<th>Item</th>
<th>2003</th>
<th>2002</th>
</tr>
</thead>
<tbody>
<tr>
<td>Contributions receivable</td>
<td>1,500</td>
<td>21,306</td>
</tr>
<tr>
<td>Cash surrender value of life insurance (net of related policy loans” of $239,106 and $219,640)&quot;</td>
<td>22,123</td>
<td>29,567</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td><strong>23,623</strong></td>
<td><strong>50,873</strong></td>
</tr>
</tbody>
</table>

### TOTAL ASSETS

<table>
<thead>
<tr>
<th></th>
<th>2003</th>
<th>2002</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Total</strong></td>
<td><strong>9,853,273</strong></td>
<td><strong>10,486,285</strong></td>
</tr>
</tbody>
</table>

## LIABILITIES AND NET ASSETS

### LIABILITIES

<table>
<thead>
<tr>
<th>Item</th>
<th>2003</th>
<th>2002</th>
</tr>
</thead>
<tbody>
<tr>
<td>Accounts payable and accrued expenses</td>
<td>26,799</td>
<td>30,477</td>
</tr>
<tr>
<td>Due to affiliate</td>
<td>1,972</td>
<td>101,451</td>
</tr>
<tr>
<td>Liability under unitrust agreement</td>
<td>275,263</td>
<td>297,236</td>
</tr>
<tr>
<td>Liability for future interest in pooled income fund</td>
<td>28,795</td>
<td>29,465</td>
</tr>
<tr>
<td>Deferred compensation</td>
<td>122,250</td>
<td>117,552</td>
</tr>
<tr>
<td>Other</td>
<td>191,000</td>
<td>0</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td><strong>646,079</strong></td>
<td><strong>576,181</strong></td>
</tr>
</tbody>
</table>

### NET ASSETS

<table>
<thead>
<tr>
<th>Item</th>
<th>2003</th>
<th>2002</th>
</tr>
</thead>
<tbody>
<tr>
<td>Unrestricted</td>
<td>(206,101)</td>
<td>(465,767)</td>
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<tr>
<td>Temporarily restricted</td>
<td>1,140,879</td>
<td>1,112,467</td>
</tr>
<tr>
<td>Permanently restricted</td>
<td>8,272,901</td>
<td>9,263,404</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td><strong>9,853,273</strong></td>
<td><strong>10,486,285</strong></td>
</tr>
</tbody>
</table>

### TOTAL LIABILITIES AND NET ASSETS

<table>
<thead>
<tr>
<th></th>
<th>2003</th>
<th>2002</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Total</strong></td>
<td><strong>$9,853,273</strong></td>
<td><strong>$10,486,285</strong></td>
</tr>
</tbody>
</table>

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.