Dear Colleagues,

The Foundation made significant progress during the past year pursuing our vision of a society that supports social justice and the rights of all people to participate in occupations that are both meaningful and contribute to health.

We work every day through the AOTF Institute for the Study of Occupation and Health to fulfill this vision and increase its relevance for the healthcare marketplace of the future. Collaboration with our professional partners, AOTA and NBCOT, is at the very core of the Foundation’s commitment to assure that our collective priorities are in sync, avoiding duplication of effort and guaranteeing responsible and effective stewardship over the Foundation’s resources.

Here are just a few of our highlights:

- AOTF partnered with AOTA to launch a Leadership Mentoring Program for occupational therapy faculty to stimulate leadership within the academic community. This is a most pressing professional priority as faculty vacancies surge and our senior academic leaders prepare for retirement. AOTF/AOTA Leadership Fellowships provided 18 occupational therapy faculty members an opportunity to participate in this unique mentoring program. It will prepare them for increasing levels of responsibility within their academic communities, be they junior faculty members working towards tenure; program chairs or faculty seeking increased administrative roles; or assistant deans pursuing dean status.

- The AOTF and AOTA governing Boards approved the creation of a new interagency Research Advisory Panel. Each organization will appoint up to five panel members to collaboratively guide the profession’s research agenda to advance science and promote research of the highest quality in occupational therapy.

- At the request of the World Federation of Occupational Therapists, AOTF generated recommendations for an Ad Hoc Group report concerning a national emergency preparedness plan for occupational therapy. This plan includes strategies to coordinate efforts of non-governmental organizations, national and local governmental agencies, other health and rehabilitation professionals, and community volunteers.

- AOTF instituted a new online scholarship application through the AOTF Web site for 55 scholarships to be awarded in May 2007. This online format facilitated both the application and review process and has resulted in a significant increase in scholarship applications.

- AOTF expanded the capacity of the Doctoral Network to support individuals engaged in doctoral education by moving the DocNet listserv to the AOTA listserv software. In addition, the DocNet is planning to increase mentoring and exchange of ideas in 2007 by sponsoring a series of online discussions titled “Strategies for Success.”

- AOTF will join forces with AOTA and NBCOT to host the second annual reception for new practitioners and recent graduates to learn about volunteer leadership opportunities with the organizations. The reception will be held at the AOTA annual conference in St. Louis.

Continued on page 2
I wish I could fully convey my optimism and excitement about the future of occupational therapy and the Foundation. Each year, I am pleased to report AOTF’s continuing efforts to generate knowledge and advance our science, encourage occupational therapy leaders, fund education, and focus on the future of the profession. But more importantly, I want to express the appreciation of the AOTF Board of Directors for the personal investment of our many colleagues in the work of the Foundation. Our progress would not be possible without your support and continued partnership with us as we build for the future. 2006 was a banner year for AOTF in every way. And with your continuing support we look forward to ever greater success in the years ahead.

Ruth Ann Watkins, President

Jeffrey Reznick Welcomed as Director of AOTF Institute

On March 12, Dr. Jeffrey S. Reznick assumed the position of Director of the AOTF Institute for the Study of Occupation and Health. His appointment will support the Foundation’s work in promoting human occupation as fundamental to health and one’s participation in the meaningful roles and activities that comprise everyday life.

Jeff holds a PhD in history from Emory University and is an accomplished researcher and writer for both scholarly and popular audiences. His peer-reviewed scholarship is closely aligned with the history and future of occupational therapy. It addresses the social values that drive rehabilitation generally and, in particular, the rehabilitation of veterans with disabilities and their reintegration into civilian society. Jeff holds an adjunct appointment in the Department of Community Health and Family Practice at Howard University College of Medicine. He also serves on the Disability Workgroup of the National Association of County and City Health Officials.

Jeff comes to AOTF from the National Museum of Health and Medicine of the Armed Forces Institute of Pathology in Washington, DC. As senior curator, he led the museum in scholarly research related to the past, present, and future of rehabilitation. He also served as executive director and senior research fellow of the Orthotic and Prosthetic Assistance Fund, the official philanthropy of the US orthotics and prosthetics community.

In preparation for her retirement later this spring, Nedra Gillette, Interim Director of the Institute, is orienting Jeff to the structure and programs of the Institute, which she helped to conceptualize. “It is truly exciting that our vision for an Institute for the Study of Occupation and Health will be realized this year,” Nedra reflected with enthusiasm “Jeff brings the skills, energy, and knowledge and leadership so necessary to make the AOTF vision a reality.”
AOTA/AOTF Leadership Mentoring Program Begun

AOTA and AOTF are pleased to announce the 18 participants selected for the AOTA/AOTF Leadership Mentoring Program led by Dr. Wendy Coster of Boston University. Each of these aspiring leaders brings a rich background of experience in academic leadership and a clearly articulated commitment to pursue increasing levels of leadership responsibility. Participants received a fellowship in the amount of $2,500 to support them in a unique series of mentoring circles over nine months. The program began with an in-person meeting in January 2007.

Grace T. Baranek, PhD, OTR/L, FAOTA
Associate Professor, Division of Occupational Science, Department of Allied Health Sciences, University of North Carolina at Chapel Hill

Katherine A. Dimitropoulos, PhD, OTR/L
Assistant Professor, Division of Occupational Therapy, Long Island University, Brooklyn Campus

Wendy Hildenbrand, MPH, OTR/L, FAOTA
Clinical Instructor, Department of Occupational Therapy Education, School of Allied Health, University of Kansas

Janet M. Powell, PhD, OTR/L
Assistant Professor, Division of Occupational Therapy, Department of Rehabilitation Medicine, University of Washington

Patricia Bowyer, EdD, OTR/L, BCN
Postdoctoral Research Associate, Department of Occupational Therapy, College of Applied Health Sciences, University of Illinois at Chicago

Marcia L. Finlayson, PhD, OTR, OT(C)
Associate Professor, Department of Occupational Therapy, College of Applied Health Sciences, University of Illinois at Chicago

Kristie P. Koenig, PhD, OTR/L
Assistant Professor, Department of Occupational Therapy, College of Health Professions, Temple University, Philadelphia, Pennsylvania

Cindee Quake-Rapp, PhD, OTR
Professor, Department of Occupational Therapy, Western Michigan University

Brent Braveman, PhD, OTR/L, FAOTA
Clinical Associate Professor, Department of Occupational Therapy, College of Applied Health Sciences, University of Illinois at Chicago

Lynne Richard, MA, OT
Assistant Professor, Department of Occupational Therapy, Kean University

Peggy L. Denton, PhD, OTR, FAOTA
Chair, Health Professions Department, Associate Professor and Program Director, Occupational Therapy Program, University of Wisconsin – La Crosse

Kristie P. Koenig, PhD, OTR/L
Assistant Professor, Department of Occupational Therapy, College of Health Professions, Temple University, Philadelphia, Pennsylvania

Linda D. Musselman, PhD, OTR, FAOTA
Associate Professor and Chairperson, Department of Occupational Therapy, University of Central Arkansas

C. Douglas Simmons, PhD, OTR/L
Assistant Professor, Department of Occupational Therapy, University of New Hampshire

Jaime Phillip Munoz, PhD, OTR, FAOTA
Assistant Professor, Department of Occupational Therapy, Rangos School of Health Sciences, Duquesne University

AOTA Receives Bequest from Norton Estate

AOTF is the recipient of a planned gift from Yvonne Norton, MA, OTR/L, FAOTA, who left a bequest of $50,000. The Foundation will work with Virginia Maddox Powell, Ms. Norton’s personal representative, to create a memorial that will advance the scientific basis for therapy. Yvonne Norton was a student at the University of Southern California and was a protégé of A. Jean Ayres, who taught her the importance of physiological processes and gave her an understanding of neuroscience and human functioning.

If you are interested in making a planned gift to AOTF, please contact Martha Kirkland at the Foundation’s address or mkirkland@aotf.org.
AOTF convened an interdisciplinary research conference entitled Habit and Rehabilitation: Promoting Participation in late January 2007 at the Asilomar Conference Center in Pacific Grove, California. This gathering marked the third in a series of AOTF conferences funded by the National Institutes of Health to study the relationship between habits and health. The habits conference series represents one of the Foundation’s most significant commitments to innovation and the development of knowledge. More than 80 scholars from anthropology, social geography, neuroscience, psychology, education, occupational science, occupational therapy, human development, sociology, and gerontology participated in the conference. As a commitment to nurture future scholarship, the senior scientists who offered keynote presentations invited their protégés to contribute to the conference dialogue.

Participants in the third habits conference traveled from Canada, Australia, Israel, Japan, and Sweden. Their interests spanned habits of good health, habits concerning the neural underpinnings of behavior, habits of social systems both positive and negative, and habits of families as they influence child development.

Participants attended formal presentations of papers, poster sessions and roundtables.

Dr. Florence Clark opened the meeting as keynote speaker. She presented a scholarly synthesis of the concepts of habit as found in the current literature. As a participant and speaker in each of the previous conferences, Dr. Clark’s vision set the stage for building on existing knowledge to advance greater understanding about habits. She established important links between theoretical perspectives as represented by the contributing disciplines, and their clinical uses across rehabilitation.

Dr. Elizabeth Townsend closed the conference with a synthesis of the five-day proceedings. In so doing, she engaged the theme of social justice to demonstrate the relevance of the presentations in this important regard. Enthusiasm toward Dr. Townsend’s presentation and the overall value of this conference inspired the next habits conference planning committee to form on-the-spot. Plans are now underway for the fourth conference to be held early winter 2009. Proceedings of Habits III will be published as a supplement to the fall 2007 issue of OTJR: Occupation, Participation and Health.

### Occupational Therapy Loses Devoted Colleague

Dr. Helen Hopkins (known by her many friends as Hoppy) died recently at her home after visiting with her friend Helen Smith in Boston and celebrating her 86th birthday. Former AOTA President, Mary Evert, described Hoppy as “a great mentor with a delightful sense of humor… a thoughtful woman who gave her whole life to the profession”.

AOTF was the beneficiary of more than a decade of Dr. Hopkins’s leadership. The profession will long remember her conscientious advocacy for students as chairperson of the Foundation’s Scholarship Committee for 12 years. It is for this service that AOTF is honoring Helen Hopkins with the Leadership Commendation at the AOTA Conference in 2007.

The commendation will be bestowed posthumously. The occasion will be all the more meaningful as we acknowledge that Hoppy knew about her commendation and had planned to attend the conference in-person to receive it.

Helen Hopkins was a founding faculty member of the Department of Occupational Therapy at Temple University, active at local, national, and international levels, and a former AOTA treasurer. She was named an AOTA Fellow and later received AOTA’s highest service award, The Award of Merit. Promoting excellence in education was at the core of Hoppy’s professional life. She may be best remembered as co-editor of four editions of Willard and Spackman’s Occupational Therapy.

Remembrance by Moya Kinnealy, Dr. Hopkins’ close friend and colleague and Martha Kirkland.
2006 Winners of the AOTF Dissertation Research Grants

The following doctoral candidates each received a $5000 AOTF Dissertation Research Grant in 2006 to aid in the completion of their research.

**Sarah Austin**, MS, OTR/L  
University of Illinois at Chicago  
*Hierarchies of Abilities and Activity Demands in Assessments Associated with the Cognitive Disabilities Model: A Validity Study*

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

**Dory Marken**, MS, OT/L, FAOTA  
University of Kentucky  
*Attitudes and Beliefs of Grandmothers Raising Grandchildren in their Provision of Nutrition*

**Edward McAnanama**, MSc, MEd, OT Reg.(Ont), OTR  
University of Toronto  
*Investigating Metamemory Mechanisms in Schizophrenia by Manipulating Events at Memory Retrieval*

**Eynat Shevil**, MS, OTR/L  
University of Illinois at Chicago  
*Developing and Pilot Testing a Cognitive Intervention Program for Persons with Multiple Sclerosis*

Board Honors Departing AOTF Senior Staff

At their November 2006 meeting, the AOTF Board of Directors issued a resolution honoring each of the two retiring senior staff members of AOTF. Nedra Gillette was honored for her years of service nurturing the development of the profession’s theoretical underpinnings, its body of knowledge, and dissemination of knowledge to advance practice and education. In her honor, the Board created *The Nedra Phelps Gillette Early Career Award in Science* to recognize outstanding contributions of emerging scientists in occupational therapy. The historical book collection of the Wilma L. West Library is now named the Mary S. Binderman Historical Collection in order to honor Mary’s integrity, professionalism and her work to empower our profession with knowledge. Mary has been the driving force behind the WLW Library for the past twenty years; Mary modernized the library and kept the collection accessible and relevant.

Changes for the Wilma L. West Library

Mary S. Binderman, MLS, retired in October 2006 knowing that the library is in the capable hands of Mindy A. Hecker, MBA, MLS. Mindy has served as Reference Librarian for two years and prior to receiving her MLS, was the AOTA Membership Director for 14 years. Ellen Solomon, MLS, joined the AOTF staff in January as Reference Librarian. Ellen worked in several hospital libraries and previously was a medical technologist. Mary continues as a consultant to the library and will index and catalogue new materials for OT SEARCH.

Devastated Botten Family and Friends Create an Enduring Legacy

Friends and family were shaken when Linda Renee Botten and her husband Steven died in a motorcycle accident on February 18, 2007 near their home in Ventura County, California. Linda’s family, friends, and colleagues quickly moved to establish The Linda Botten Memorial Scholarship Fund to commemorate her prestigious career as an occupational therapist.

Linda graduated from the occupational therapy program at Colorado State University in Fort Collins and soon developed an aptitude for private practice and hand therapy. In 2000, Linda and Steven moved from their home in Bozeman, Montana to California and established a successful hand therapy practice that flourished and grew to five locations throughout Santa Barbara and Ventura Counties.

Linda was a devoted and encouraging mother and grandmother, active in many meaningful occupations. Linda and Steve will be remembered as avid travelers and lovers of the outdoors who placed supreme value on family and friendship.

Contributions may be directed to The Linda Botten Memorial Scholarship Fund, c/o AOTF, 4720 Montgomery Lane, PO Box 31220, Bethesda MD, 20824-1220.

The AOTF Mission

Through the use of fiscal and human resources, AOTF expands and refines the body of knowledge of occupational therapy and promotes understanding of the value of occupation in the interest of the public good.
Congratulations to the 37 deserving occupational therapy students who received AOTF scholarships in 2006. The two largest awards of $5,000 each represent the continuing generosity of our valued corporate partner, North Coast Medical. State occupational therapy associations funded twenty-two of these scholarships through partnerships with AOTF.

In 2006, AOTF introduced three endowed scholarships. The first of these was established by Ilse Renee Achter before her death for students who reflect her ideals of working with under-served populations. Ethel Beard Burstein funded two scholarships as an expression of her gratitude to her mentors Helen Willard and Clare Spackman, These educators, clinicians, and humanitarians profoundly influenced Ms. Burstein’s occupational therapy education and career.

North Coast Medical Scholarship - $5,000 each
Kristen Luebrecht
The Ohio State University
Columbus, OH

Stephen Hrezik
Alvernia College
Reading, PA

Kappa Delta Phi Scholarship – $2,000 each
Jody Crane
Loma Linda University
Loma Linda, CA

Kimberly Peters
University of Florida
Gainesville, FL

Naida Ackley Memorial Scholarship - $2,000
David Dietz
Midwestern University
Downers Grove, IL

Ethel Beard Burstein Scholarship – $1,200 each
Dana Gais
University of Pittsburgh
Pittsburgh, PA

Jenny Holtslander
Belmont University
Nashville, TN

Renee Achter Memorial Scholarship - $1,000
Paula Querido-Kahn
Tufts University
Medford, MA

Diane Blicksilver Aja Memorial Scholarship - $1,000
Kathryn Cargile
Medical College of Georgia
Augusta, GA

Mary K. Minglin Memorial Scholarship - $1,000
Sandra Piechocki
University of Southern Maine,
Lewiston-Auburn College
Lewiston, ME

Edith Weingarten Memorial Scholarship - $1,000
Phuong Nguyen
Colorado State University
Fort Collins, CO

Willard and Spackman Memorial Scholarship - $1,000
Cydney Klc
University of Utah
Salt Lake City, UT

Janice McGraw Memorial Scholarship - $1,000
Suzanne Kamel
University of North Carolina
Chapel Hill, NC

Assembly of Student Delegates Scholarship - $450
Anne Osberger
Washington University
St. Louis, MO

Carlotta Welles Scholarship - $500
Karen Singleton
Cabarrus College of Health Sciences
Concord, NC

2006 AOTF/STATE ASSOCIATION SCHOLARSHIPS

Florence Wood Arkansas Occupational Therapy Association Scholarship - $500
Alana Dickey
University of Central Arkansas
Conway, AR

District of Columbia Occupational Therapy Association Scholarship - $500
Konah Kpoto
Howard University
Washington, DC

LOTA Scholarship of the Louisiana Occupational Therapy Association - $500
Jenna Pastor
Louisiana State University Health Sciences Center
Baton Rouge, LA

Karen Jacobs Scholarship of the Massachusetts Association for Occupational Therapy - $500
Kathleen Callaghan
Tufts University
Medford, MA

Michigan Occupational Therapy Association Scholarship - $500
Kimberly Weeks
Western Michigan University
Kalamazoo, MI
Mary Eileen Dixey Scholarship of the New Hampshire Occupational Therapy Association - $2,000
Debra Gray
New Hampshire Community Technical College
Claremont, NH

New York State Occupational Therapy Association Scholarship - $1,000 each
Lauren Selsky
New York University
New York, NY
Alison Walsh
New York Institute of Technology
Old Westbury, NY

North Carolina Occupational Therapy Association Scholarship - $300 each
Marisha Gooden
Cabarrus College of Health Sciences
Concord, NC
Vivian Nguyen
University of North Carolina
Chapel Hill, NC

Ohio Occupational Therapy Association Scholarship - $1,000 each
Gwendolyn Boyce
The Ohio State University
Columbus, OH

Denea Butts
Medical University of Ohio
Toledo, OH

Occupational Therapy Association of Oregon Scholarship - $1,100
Sally Stauffer
Pacific University
Forest Grove, OR

Reba M. Sebelist Scholarship of the Pennsylvania Occupational Therapy Association – $500
Lana Gealy
University of Pittsburgh
Pittsburgh, PA

Chris Ebbers Scholarship of the South Carolina Occupational Therapy Association - $750
Keri Bledsoe
Medical University of South Carolina
Charleston, SC

Texas Occupational Therapy Association Scholarship – $2,000 each
Frank Marfo
Austin Community College
Austin, TX
Anima Mupier
University of Texas Medical Branch
Galveston, TX

Utah Occupational Therapy Association Scholarship - $350
Rebecca Taylor
University of Utah
Salt Lake City, UT

West Virginia Occupational Therapy Association
The Charlotte Prudich Scholarship - $600
Cheryl Woody
West Virginia University
Morgantown, WV

The Elizabeth B. Devereaux Scholarship - $150
Barbara Hildebrand
West Virginia University
Morgantown, WV

Wisconsin Occupational Therapy Association Scholarship - $1,000 each
Megan Nankee
University of Wisconsin
Madison WI

Christy Scharping
Concordia University
Mequon, WI

Penny Kyler to lead Doctoral Network

At its upcoming meeting and reception in St. Louis, the leadership of the Doctoral Network (DocNet) will pass from Christine Peters, PhD, OTR to Penny Kyler, MA, OTR, FAOTA. For nearly a decade Chris led the DocNet as it provided mentoring, networking opportunities, and resources for emerging and established occupational therapy scholars.

Penny Kyler is currently a Public Health Analyst for the Genetic Services Branch of the Department of Health and Human Services. She is working toward her ScD at Towson University. Penny sees the DocNet as a peer-mentoring forum and incubator for developing evidence-based occupational therapy practice. She hopes to “move the group forward by connecting the various nodes in occupational therapy research. I would like to do this by developing linkages among our current researchers and new researchers or researchers to be. As an example, resources for grants, research topics and current evidence as developed by both federal and non-governmental sources will be shared on the DocNet listserv.”
Leveraging Resources and Securing the Future

AOTF relies on tax-deductible donations from individuals and corporate partners, as well as grants from public and private sources to support its programs on behalf of the profession. AOTF is especially appreciative of the contributions it receives annually from the nearly 36,000 AOTA members who each contribute 2% of their membership dues to support the Foundation’s operations.

The strengths, talents, knowledge, and experience of volunteers and the AOTF staff allow us to gain the maximum benefit from every dollar. The 2006 AOTF Annual Report highlights the year’s accomplishments and provides a public record of our assets and expenditures to promote occupational therapy research, education and practice.

The Board of Directors and staff thank those who generously supported AOTF during the 2006 fiscal year. Tax-deductible donations and in-kind gifts enable AOTF to develop science, support education, advance practice, and disseminate information about occupation, participation and health.
Stewardship and Accountability

Fiscal Year 2006

AOTF closed the fiscal year on September 30, 2006. Net assets at the close of FY 2005-2006 were $10,270,118 as compared with $10,143,590 the prior year. The increase in net assets is attributable to realized and unrealized gains on marketable securities held in the Foundation’s investment portfolio, as well as in split interest/irrevocable trusts managed by other institutions on behalf of AOTF.

Revenue for the year was $1,227,940 including $107,517 from AOTA 2% transfers representing AOTA members’ contributions. Programmatic and operating expenses were $925,776. Total gains on marketable securities were $226,656 resulting in an increase in net assets for FY 2005-2006 of $126,528.

In FY 2005-2006, the Foundation incurred expenses in the following programmatic categories.

<table>
<thead>
<tr>
<th>Program Expenses</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>Research</td>
<td>$95,141</td>
</tr>
<tr>
<td>Education</td>
<td>252,898</td>
</tr>
<tr>
<td>Scholarships</td>
<td>63,150</td>
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<tr>
<td><strong>TOTAL</strong></td>
<td><strong>411,189</strong></td>
</tr>
</tbody>
</table>

**Support Services**

| Administration and general | $324,347 |
| Marketing and development | 190,240 |
| **TOTAL**                  | **514,587** |

| TOTAL | $925,776 |

It is our intention to recognize all fiscal year 2006 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, ext. 2552.

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 Web site at www.aotf.org or you may contact AOTF directly at 301-652-6611, ext. 2552.
### ASSETS

#### CURRENT ASSETS
- **Cash and cash equivalents**: $395,444 (2006), $463,274 (2005)
- **Contributions receivable**: $4,808 (2006), $36,000 (2005)
- **Pamphlets and pins**: $931 (2006), $1,536 (2005)
- **Other receivables and prepaid expenses**: $68,973 (2006), $63,635 (2005)

#### MARKETABLE SECURITIES
- **Corporate bonds**: $212,312 (2006), $253,523 (2005)
- **Common stocks**: $1,572,662 (2006), $1,295,975 (2005)

#### SPLIT-INTEREST GIFTS
- **Pooled income fund**: $77,653 (2006), $89,727 (2005)
- **Charitable remainder unitrust**: $1,005,835 (2006), $949,824 (2005)
- **Charitable remainder trusts**: $6,908,588 (2006), $6,966,406 (2005)

#### FIXED ASSETS
- “Net of accumulated depreciation of $85,435 and $82,131”

#### OTHER ASSETS
- **Contributions receivable**: $1,500 (2006), $4,554 (2005)

#### TOTAL ASSETS

### LIABILITIES AND NET ASSETS

#### LIABILITIES
- **Accounts payable and accrued expenses**: $33,995 (2006), $30,088 (2005)
- **Due to affiliate**: $372 (2006), $125,334 (2005)
- **Liability for future interest in pooled income fund**: $17,543 (2006), $19,918 (2005)
- **Deferred compensation**: $196,996 (2006), $163,137 (2005)
- **Line of credit**: $70,467 (2006), $153,876 (2005)

#### NET ASSETS
- **Temporarily restricted**: $1,504,807 (2006), $1,388,495 (2005)
- **Permanently restricted**: $8,430,914 (2006), $8,263,792 (2005)

#### TOTAL LIABILITIES AND NET ASSETS

*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.*