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2006-2007

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American Occupational Therapy Foundation (AOTF) 
President’s Letter to Our Stakeholders

Stewardship can be viewed as the assumption of responsibility for the welfare of society and the careful and responsible management of something entrusted to one’s care. Stewardship has been the guiding principle of the AOTF since its inception.

This report accounts for the gifts of time, resources, money, and talent given to us by our stakeholders to advance the profession of occupational therapy and enhance its ability to serve society. The report covers the fiscal year October 1, 2006 to September 30, 2007; a year of significant transition and accomplishment.

During this period, in anticipation of the retirement of three senior staff who represented an extraordinary eighty combined years of service to the AOTF, four Board members who otherwise would have retired agreed to extend their terms by one year in order to assure continuity of Board governance. During that time, Mary Binderman, Nedra Gillette, and Martha Kirkland thoroughly oriented and mentored Mindy A. Hecker, MBA, MLS, the new Director of Information Resources and the Wilma L. West Library and Jeffrey S. Reznick, PhD, the new Director of the Institute for the Study of Occupation and Health. In June of 2007, Ms. Hecker and Dr. Reznick became interim Co-Executive Directors while the AOTF Board undertook its search for a new Executive Director to lead AOTF into the future.
Much was accomplished in relation to the mission of the AOTF during this period of transition. New possibilities from the best of the past were used to create programs and initiatives for the future. Collaboration and partnerships were powerful ways of accomplishing multiple goals. Through collaboration with our professional partners the American Occupational Therapy Association (AOTA) and National Board for Certification in Occupational Therapy (NBCOT), we shared the effort to position the profession for the greater benefit of society in the years ahead as articulated in the AOTA Centennial Vision.

The financial assets increased by $650,000 as a result of increases in returns from investments and donations, including the 2% of AOTA membership dues that supports the operations of the Foundation enabling an increase in programming and scholarships given during this time period. The report that follows highlights the accomplishments of the year.

On behalf of the Board and the staff of AOTF we thank you, our stakeholders, for your generosity and your partnership in our shared commitment to the profession and society. We value your trust in our stewardship and we promise to uphold the values that underpin our profession as we work together for the benefit of current and future generations.

Gratefully,

Ruth Ann Watkins
President
The educational and scientific programs of the Foundation – organized chiefly under the Institute for the Study of Occupation and Health – reflect our dedication to the interconnected areas of **advancing research**, **enhancing leadership**, and **fostering excellence in education and practice**. To these ends, the accomplishments of the AOTF Institute in fiscal year 2007 were many.

## Advancing Research

*Develop knowledge and build an interdisciplinary network of scientists*

### Habits, Health, and Society

AOTF convened its third interdisciplinary research conference to foster dialogue, research, and theory development about habits. Entitled *Habit and Rehabilitation: Promoting Participation*, this conference was funded in part through a grant from the National Center for Medical Rehabilitation Research of the National Institutes of Health. The proceedings of this conference were published as a supplement to the fall 2007 issue of the Foundation’s scientific journal *OTJR: Occupation, Participation and Health*. 
Research Programs at the AOTA Conference and Exposition

AOTF offered several research-focused programs at the AOTA annual conference in St. Louis, including an AOTF-AOTA jointly-sponsored pre-conference institute entitled “Building an Academic Career With a Research Training Award.” In addition, the Foundation hosted its annual AOTF Research Colloquium and Tea, entitled “The Significance of Population Research for Occupational Therapy,’ and the AOTF Qualitative Research Exchange (QRE), entitled “‘Emergence’ in a Structured World.”

Research Advisory Panel

Established during the spring of 2007, the AOTA/AOTF Research Advisory Panel will advise the AOTA and AOTF boards of directors in several matters, including the translation of research to education and practice, and the review of the research agenda of the profession and its alignment with national research priorities and emerging social and technology issues. The panel will also foster critical analyses of issues related to the delivery of services, evolution of theories, and the overall body of knowledge relevant to occupational therapy.

Appointed by the AOTA and AOTF presidents, members of the panel include:
Joan Rogers, PhD, OTR/L, FAOTA – Chair
M. Carolyn Baum, PhD, OTR/L, FAOTA
Wendy Coster, PhD, OTR/L, FAOTA
Joyce Engel, PhD, OTR/L, FAOTA
Joy M. Hammel, PhD, OTR/L, FAOTA
Mary Law, PhD, OT(C)
Mary C. Lawlor, ScD, OTR/L
Trudy R. Mallinson, PhD, OTR/L, NZROT
William Charles Mann, PhD, OTR, FAOTA
Kenneth J. Ottenbacher, PhD, OTR, FAOTA
Mary Lynn Schneider, PhD, OTR
Dissertation Research Grant Program

The Dissertation Research Grant Program represents one of AOTF’s chief investments in building the careers of academic scientists. This program specifically promotes the development of qualified faculty members whose careers focus on contributing to science in occupational therapy. Grants are awarded to occupational therapists whose dissertation research directly contributes to one of the profession’s Research Priorities and the Parameters for Practice and where a strong program of mentoring is available to the candidate. Recipients in 2007 included:

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

Marie-Christine Potvin, MHS, OTR/L, McGill University  
Intensity, Variety and Type of Recreational Activities in School Age Children with High Functioning Autism

Shirley Ann Wells, MPH, OTR, University of Texas Health Sciences Center at Houston, School of Public Health  
Occupational Performance Among Mexican Americans Living on Hemodialysis in the Rio Grande Valley of Texas

Enhancing Leadership

Build capacity to expand science in occupational therapy

Academy of Research

Established by AOTF in 1983, the Academy of Research in occupational therapy recognizes individuals who have made exemplary and distinguished contributions to the science of occupational therapy. By vote of the Academy in 2007, three distinguished researchers joined this prestigious body:

Daniel Bourbonnais, PhD, OT(C)  
Université de Montréal

Joyce Engel, PhD, OTR/L, FAOTA  
University of Washington

Catherine Lysack, PhD, OT(C)  
Wayne State University
Leadership Mentoring Fellowships

AOTA and AOTF jointly granted leadership mentoring fellowships to 18 committed occupational therapy faculty, enabling them to participate in a nine-month “mentoring circle.” During this period, participants shared stories about the experiences in leadership, gained new insights into their leadership development, and received tools to become more successful leaders in both their academic and professional lives. All participants developed an individual plan for their future development as academic leaders.

Awards

AOTF was pleased to bestow the following awards in 2007 to individuals who made significant and sustained contributions to the mission of AOTF.

Certificate of Appreciation
- Christine Peters, PhD, OTR

Virginia Scardina Award of Excellence
- Joan Dostal, OTR/L

Pi Theta Epsilon Mary J. Bridle First Research Award
- Laureen R. Franklin, MS, OTR/L

Leadership Service Commendation
- Helen L. Hopkins, EdD, OTR/L, FAOTA (Posthumous)
- Nancy L. Beck, MA, OTR/L
- Elizabeth Tiffany Mather, MEd, OTR, FAOTA
- Carole Simon, MS, OTR/L

Doctoral Network

Under the leadership of Penny Kyler, MA, OTR, FAOTA, the Doctoral Network (DocNet) continued to facilitate development of doctoral education among occupational therapy practitioners by providing networking opportunities and collaborative engagement among emerging and established scholars.

Pi Theta Epsilon

AOTF continued its support of PTE and its mission to recognize and encourage superior scholarship among students enrolled in professional entry-level programs at accredited schools across the United States. At AOTA annual conference, PTE offered a workshop entitled “Yesterday to Today: Occupational Therapy and the U.S. Army.”
Fostering Excellence in Education and Practice
Develop faculty and disseminate knowledge to enhance practice of occupational therapy

Wilma L. West Library

The cornerstone of the Institute for the Study of Occupation and Health is the Wilma L. West Library, which serves as the national repository for the literature of the occupational therapy profession, including journals, newsletters, monographs, proceedings, reports, doctoral dissertations, and master’s theses that address the education, theory, and practice of occupational therapy and the study of occupational science. In cooperation with AOTA, the Wilma L. West Library supports OT SEARCH, the profession’s largest and most comprehensive online bibliographic database encompassing the literature of occupational therapy and related subject areas. During 2007, 1,500 new items were added to OT SEARCH and the Wilma L. West Library.

Program for the Scholarship of Teaching and Learning

Through a pre-conference institute at the AOTA annual conference, AOTF launched its Program for the Scholarship of Teaching and Learning (SoTL), a mentoring-focused initiative aimed to enhance occupational therapy education and faculty development through study and implementation of the SoTL inquiry process.

Scholarships

During 2007, AOTF is proud to have awarded scholarships to 39 deserving occupational therapy students around the country. These scholarships were funded through the generosity of corporate partners, individual memorials and endowments, and the scholarships of 20 state associations.

Professional Master’s Degree in Occupational Therapy

North Coast Medical Scholarship - $5,000 each

Amber DeGraff, Midwestern University
Mary Coyne, Colorado State University
Kappa Delta Phi Scholarship – $2,000 each
  Laura Tomlinson, Saint Louis University
  Maya Fok, Dominican University of California

Willard & Spackman Memorial Scholarship - $2,000
  Jessica Ogden, Elizabethtown College

Carolyn Kohn Memorial Scholarship - $2,000
  Karen Grefe, Stony Brook University

Ethel Beard Burstein Scholarship – $1,200
  Megan Angerson, Temple University

Progressus Therapy Scholarship - $1,000 each
  Theresa Bowen, University of Florida
  Amy King, University of North Carolina at Chapel Hill
  Anne Kiraly, University of Illinois at Chicago

Renee Achter Memorial Scholarship - $1,000
  Julie Werner, University of Southern California

Diane Blicksilver Aja Memorial Scholarship - $1,000
  Sarah Morken, University of Puget Sound

Janice McGraw Memorial Scholarship - $1,000
  Denise Griggs, Lenoir-Rhyne College

Assembly of Student Delegates Scholarship - $450
  Jamie Fracol, Rockhurst University

Ruth Peterson Memorial Scholarship (Kappa Chapter of Pi Theta Epsilon) - $375
  Christina Thompson, University of North Dakota

ASSOCIATE DEGREE IN OCCUPATIONAL THERAPY
Carlotta Welles Scholarship - $500 each
  Ashleigh Goar, Holmes Community College
  Cindy Godwin, Cabarrus College
  Amy Rose, College of Saint Catherine
2007 AOTF / STATE ASSOCIATION SCHOLARSHIPS

The Adelaide Ryerson Smith Memorial Award of the Arizona Occupational Therapy Association - $1,000
Nicoletta Calorie, A.T. Still University

The Florence Wood Arkansas Occupational Therapy Association Scholarship - $500
Megan Boeckman, University of Central Arkansas

The LOTA Scholarship of the Louisiana Occupational Therapy Association - $500
Suni Holden, Louisiana State University Health Sciences Center

The Karen Jacobs Scholarship of the Massachusetts Association for Occupational Therapy - $500
Leah Bicknell, Tufts University

The Michigan Occupational Therapy Association Scholarship - $500
Barbara Boeheim, Eastern Michigan University

The Julia D. Sweeney Scholarship of the New Mexico Occupational Therapy Association - $500
Jennifer Strand, University of New Mexico

The New York State Occupational Therapy Association Scholarship - $1,000 each
Professional Master’s Degree in Occupational Therapy
Nora Presutti, Mercy College
Stefanie Michaelsen, Touro College
Brianne Pugliese, SUNY Buffalo

The North Carolina Occupational Therapy Association Scholarship - $300
Associate Degree in Occupational Therapy
Michelle Beachum, Cabarrus College of Health Sciences

The Ohio Occupational Therapy Association Scholarship - $1,000
Professional Master’s Degree in Occupational Therapy
Anne Rings, The Ohio State University
The Occupational Therapy Association of Oregon Scholarship - $1,100
Christine Van Osdol, Pacific University

The Reba M. Sebelist Scholarship of the Pennsylvania Occupational Therapy Association – $500
Professional Master’s Degree in Occupational Therapy
Danielle Shuttleworth, University of Pittsburgh
Amalie Andrew, University of Pittsburgh

The Texas Occupational Therapy Association Scholarship - $2,000 each
Professional Master’s Degree in Occupational Therapy
Cory Grandinetti, Texas Woman’s University
Jennifer Matsu, Texas Woman’s University

The Utah Occupational Therapy Association Scholarship - $350
Karissa Ballner, University of Utah

The West Virginia Occupational Therapy Association
The Charlotte Prudich Scholarship - $600
Alexis Lilly, West Virginia University

The Elizabeth B. Devereaux Scholarship - $150
Rebecca Frame, Mountain State University

The Wisconsin Occupational Therapy Association Scholarship - $1,000 each
Professional Master’s Degree in Occupational Therapy
Anna Roth, University of Wisconsin, Madison
Elyse Anderson, University of Wisconsin, Madison
AOTF closed the fiscal year on September 30, 2007. Net assets at the close of FY 2006-2007 were $10,927,577 as compared with $10,270,118 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 $1,478,763 including $144,406 from AOTA 2% transfers representing AOTA members’ contributions. Programmatic and operating expenses were $1,147,287. Total gains on marketable securities were $385,644 resulting in an increase in net assets for FY 2006-2007 of $661,183.

In FY 2006-2007, the Foundation incurred expenses in the following programmatic categories:

<table>
<thead>
<tr>
<th>PROGRAM EXPENSES</th>
<th>2007</th>
</tr>
</thead>
<tbody>
<tr>
<td>Research</td>
<td>$294,718</td>
</tr>
<tr>
<td>Education</td>
<td>245,015</td>
</tr>
<tr>
<td>Scholarships</td>
<td>48,621</td>
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<tr>
<td></td>
<td>588,354</td>
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</table>

<table>
<thead>
<tr>
<th>SUPPORT SERVICES</th>
<th>2007</th>
</tr>
</thead>
<tbody>
<tr>
<td>Administration and general</td>
<td>399,133</td>
</tr>
<tr>
<td>Marketing and development</td>
<td>159,800</td>
</tr>
<tr>
<td></td>
<td>558,933</td>
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<tr>
<td></td>
<td>$1,147,287</td>
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<tr>
<td>ASSETS</td>
<td>2007</td>
</tr>
<tr>
<td>--------------------------------------------</td>
<td>------------</td>
</tr>
<tr>
<td><strong>CURRENT ASSETS</strong></td>
<td></td>
</tr>
<tr>
<td>Cash and cash equivalents</td>
<td>$429,403</td>
</tr>
<tr>
<td>Contributions receivable</td>
<td>1,500</td>
</tr>
<tr>
<td>Pamphlets and pins</td>
<td>2,805</td>
</tr>
<tr>
<td>Other receivables and prepaid expenses</td>
<td>89,630</td>
</tr>
<tr>
<td></td>
<td><strong>523,338</strong></td>
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<tr>
<td><strong>MARKETABLE SECURITIES</strong></td>
<td></td>
</tr>
<tr>
<td>Corporate bonds</td>
<td>157,535</td>
</tr>
<tr>
<td>Common stocks</td>
<td>1,737,022</td>
</tr>
<tr>
<td></td>
<td><strong>1,894,557</strong></td>
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<tr>
<td><strong>SPLIT-INTEREST GIFTS</strong></td>
<td></td>
</tr>
<tr>
<td>Pooled income fund</td>
<td>76,544</td>
</tr>
<tr>
<td>Charitable remainder unitrust</td>
<td>1,098,948</td>
</tr>
<tr>
<td>Charitable remainder trusts</td>
<td>7,125,941</td>
</tr>
<tr>
<td></td>
<td><strong>8,301,433</strong></td>
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<tr>
<td><strong>FIXED ASSETS</strong></td>
<td></td>
</tr>
<tr>
<td>Net of accumulated depreciation of</td>
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</tr>
<tr>
<td>$106,950 and $88,845</td>
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</tr>
<tr>
<td></td>
<td><strong>18,105</strong></td>
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<tr>
<td><strong>OTHER ASSETS</strong></td>
<td></td>
</tr>
<tr>
<td>Contributions receivable</td>
<td>—</td>
</tr>
<tr>
<td>Certificate of deposit-collateral on loan</td>
<td>174,713</td>
</tr>
<tr>
<td>Cash surrender value of life insurance</td>
<td>15,431</td>
</tr>
<tr>
<td>(&quot;net of related policy loans of $178,667 and $155,787&quot;)</td>
<td></td>
</tr>
<tr>
<td></td>
<td><strong>190,144</strong></td>
</tr>
<tr>
<td><strong>TOTAL ASSETS</strong></td>
<td>$10,927,577</td>
</tr>
</tbody>
</table>

| LIABILITIES AND NET ASSETS                  |            |            |
| **LIABILITIES**                            |            |            |
| Accounts payable and accrued expenses       | $84,488    | $33,995    |
| Due to affiliate                           | 97,683     | 372        |
| Liability under unitrust agreement         | 249,825    | 235,256    |
| Liability for future interest in           | 17,518     | 17,543     |
| pooled income fund                         | 204,876    | 196,996    |
| Line of Credit                             | 226,222    | 70,467     |
|                                           | **880,620** | **554,629** |
| **NET ASSETS**                             |            |            |
| Temporarily restricted                      | 1,618,727  | 1,504,807  |
| Permanently restricted                      | 8,660,678  | 8,430,914  |
| Unrestricted                               | (232,440)  | (220,232)  |
|                                           | **10,050,681** | **9,715,489** |
| **TOTAL LIABILITIES AND NET ASSETS**        | $10,927,577 | $10,270,118 |

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.
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