Dear Friends and Partners,

Over the past year, I have had the privilege of representing AOTF and engaging with individuals and collective audiences across a wide array of contexts. These occasions have deepened my appreciation for the impactful work of the people and communities that constitute AOTF. I am writing today to share my gratitude and thanks, reflections on our community, and visions of possible futures.

AOTF could be described through the structured groups within the organization including staff, volunteer committees, recipients of AOTF grants and scholarships, donors and supporters, and the Academy of Research. Each of these entities performs critical functions. However, this descriptive categorization does little to illuminate the multiplicity of ways in which people commit their talents, time, and expertise to support the Foundation. AOTF is people driven and like most organic communities, relies on the interpersonal relationships that optimize development. Our community has been sustained by an impressive number of colleagues who have personal, enduring investments in our mission and work. For some of you, your relationships with AOTF and the broader occupational therapy community resonate with the depth of connection captured in such phrases as “it is like family.” Such connections require care and attention. We are committed to enhancing our engagements with members of our community and welcoming additional participants. We are very appreciative of how many of you have responded, resulting in new engagements, sometimes re-engagements, and a strengthening of our numbers and networks.

Communities must be nurtured and evolve through social learning and the enactment of practices that support growth, mattering, sustainability, and relationships. Relationships also include the situatedness of AOTF within other related communities such as the broader occupational therapy community, stakeholder groups and organizations, public policy arenas, and interdisciplinary research networks. In the evolving arena of health care, these partnerships and associations with other communities become increasingly salient and provide opportunities to maximize impact.

Membership in communities is identity shaping and is often accompanied by increased perceptions of belonging and participating. As we chart the future course of AOTF, we seek to learn more about how to best enhance our engagements with you and solidify your identity as a member of the AOTF community. We solicit your suggestions and inputs. The use of the pronoun “we” in this letter is deliberate.

As articulated in this Annual Report, 2018 has been a very successful and productive year. So congratulations and deep appreciation to all of you for your efforts and contributions. Our future is dependent on the continued collective endeavors of the AOTF community. I look forward to working with all of you as we enact the “next” next steps for AOTF.

Sincerely,

Mary C. Lawlor, ScD, OTR/L, FAOTA
Chair, AOTF Board of Trustees

Your generous gift helps me both fund this education and pursue professional goals which include research and practice with the Alaska Native population...I look forward to my career as an OT – contributing to the profession’s body of evidence and to my local community.

Erin Kuester, Creighton University
2017 Mary Fiorentino Memorial Scholarship winner
Family and Community: The Ties That Bind

In our 2017 Annual Report, we highlighted mentors as an essential part of the occupational therapy research enterprise. Our intent was to make the point that we fund research, but in doing so, we, just as importantly, invest in people. Of course, OT research, and more broadly the OT profession, involves a much larger group of people.

Merriam-Webster defines community as:

A unified body of individuals, i.e. people with common interests living in a particular area; a group of people with common characteristic or interest living together within a larger society; a body of persons of common and especially professional interests scattered through a larger society; a body of persons or nations having a common history or common social, economic and political interests; a group linked by common policy.

Merriam-Webster defines family as:

The basic unit in society traditionally of two parents rearing their children; a group of individuals living under one roof and usually under one head; a group of persons of common ancestry; a group of people united by certain convictions or a common affiliation; a group of things related by common characteristics.

I would assert that OT researchers and practitioners are not only a community, but perhaps more essentially, a family.

Our 2017 Annual Report’s cover image was that of a stylized family tree. We use that image again with intent throughout this year’s Report. In this day and age, where it seems that policy and politics take precedence over family and community, I hope that occupational therapy continues to champion the value of family and community and of their critical role in binding society together. I can think of no better profession to do so. The AOTF is proud to be a part of the OT family.

Scott Campbell, PhD
CEO

[Mentors] taught me the value and the sustaining power of the love of learning, to strive for excellence in all we do, to never compromise my integrity, and to always prioritize the overall goal of improving the outcome of the patients that we serve. They also modeled our responsibility to give back to the systems that support us, including supporting the development of students and junior researchers.

Bernadette Nedelec, PhD, BScOT(C)
2018 Academy of Research Inductee
The second AOTF Planning Grant Collective, Catalyzing Research to Optimize Participation in Work & Life Roles of Cancer Survivors, was held March 4-6, 2018. A wide range of disciplines was represented as well as several funding agencies (NCI, ACS, NCMRR) were present, both as a way to identify potential funding opportunities and as a way to educate the agencies about the focus of occupational therapy on the topic.

Priority areas in which new lines of research regarding participation in cancer survivors are needed included: screening and triage for participation restrictions, self-management approaches to foster participation, and work and employment issues. A white paper of the meeting proceedings has been submitted to OTJR: Occupation, Participation and Health.

The Foundation plans to convene one Collective a year and plans are well underway for 2019 on the topic of aging in place. We believe this multidisciplinary team approach will result in much-needed new research in areas of great interest and opportunity for the OT profession.

My mentors provided me with numerous opportunities that challenged me to step out of my comfort zone and provided me with constructive feedback along the way... Key advice that has served me well was to collaborate and share resources with colleagues across disciplines and to seek out multiple funding sources especially when starting out.

Gary Bedell, PhD, OTR/L, FAOTA
2016 Academy of Research Inductee

Participants in the 2018 Planning Grant Collective.
AOTF IRG Program Remains the Cornerstone of Research Portfolio

In 2018, we reached the sixth year of continuous funding for our Intervention Research Grant (IRG) program. With the five new IRG grants awarded in 2018, we have now supported a total of 25 IRG grants and have reached $1.25 million in funding for the program. The Foundation’s niche is support of early career investigators and development of preliminary proof-of-concept research data to support the advancement of novel research ideas. Our investment in people and their research is starting to be impactful, with publications in quality journals, grant application submissions and grants funded, and career advancement for our recipients.

The IRG program would not be possible without the support of the American Occupational Therapy Association (AOTA) and the National Board for Certification in Occupational Therapy (NBCOT). And a big thank you to the hundreds of students at the 44 schools that supported the IRG program through the 2018 St. Catherine Challenge.

Also in 2018, we announced a new Health Services Research (HSR) Grant program. The HSR’s focus on patient safety, effectiveness of evidence-based care, efficiency of patient-centered care, timeliness in obtaining care, and equity of care make occupational therapy a perfect profession for conducting pilot studies that will advance the delivery, quality and impact of OT. This new program is timely considering the expectations of payers and policy makers to prove not only cost effectiveness of healthcare, but quality of services provided to patients/clients. We thank NBCOT for providing the funding to initiate and sustain this program for the next three years.

2018 IRG RECIPIENTS

Angela Caldwell, PhD, OTR/L, CLT
University of Pittsburgh
Partnering for Prevention: Promoting Healthy Habits in Underserved Communities
Mentor: Roxanna Bendixen, PhD, OTR/L.

Susan Fasoli, ScD, MS, OTR/L
MGH Institute of Health Professions
A Paradigm Shift: Rehabilitation Robotics, Cognitive Skills Training and Function
Mentor: Teresa Jacobson Kimberly, PhD, PT.

Anne Kirby, PhD, OTR/L
University of Utah
Pilot Study of the MAPSS (Maximizing Adolescent Post-Secondary Success) Intervention
Mentor: Himle Michael, PhD.

Lauren Little, PhD, OTR/L
Rush University
Bridging a Service Gap in Autism: A Hybrid Education-Coaching Intervention
Mentor: Winifred Dunn, PhD, OTR/L, FAOTA.

Rachel Proffitt, OTD, OTR/L
University of Missouri
Feasibility of the Lee Silverman Voice Treatment(R)-BIG Intervention in Stroke
Mentor: Timothy Wolf, OTD, PhD, OTR/L, FAOTA.

Drs. Lauren Little, Anne Kirby, Rachel Proffitt, Susan Fasoli, winners of the 2018 IRG, celebrated at the AOTF VIP reception.
A cademy of Research Inductees

Bernadette Nedelec, PhD, BScOT(C)

Dr. Nedelec is an Associate Professor and the former Director of the Occupational Therapy Program, School of Physical and Occupational Therapy at McGill University, Montréal, Québec, Canada. Her research interests focus on the rehabilitation of people who have sustained a major burn injury with a particular interest in the evaluation and treatment of hypertrophic scar. The formation of hypertrophic scar is considered one of the most important long-term consequences of a major burn injury leading to impairments, activity limitations and participation restrictions. Research projects have evaluated the clinical instruments used to quantify hypertrophic scar and its associated symptoms, the efficacy of treatment interventions employed to minimize hypertrophic scar and its associated sequelae, practice issues related to evidence-informed practice, ensuring burn therapist competency, and the delivery of best practice rehabilitation, as well as the comprehensive evaluation of the short- and long-term outcomes associated with burn injuries.

Ching-yi Wu, ScD, OTR

Dr. Wu is a full professor in the Department of Occupational Therapy and the Graduate Institute of Behavioral Science in the College of Medicine at Chang Gung University in Taoyuan City, Taiwan with a practice appointment as Adjunct Occupational Therapist in Chang Gung University Hospital. Dr. Wu’s research interest mainly lies in neurorehabilitation after stroke and the application of motor control study in stroke rehabilitation, together with examining the psychometric and clinimetric properties of outcome evaluations used in efficacy study. She has combined electrophysiological stimulation with task-oriented approaches; for example, transcranial direct current stimulation combined with mirror therapy for facilitating neural reorganization and motor recovery. Dr. Wu’s research has used kinematic analysis and functional magnetic resonance imaging to study the nature of improved movement control and the possible neural mechanisms underlying improvement. Dr. Wu is the Principle Investigator of the Human-Machine Interface in the Healthy Aging Center at Chang Gung University which facilitates the application of technology in rehabilitation and occupational therapy practice.

Nedra Gillette Endowed Research Fellowship Awarded to Amber Angell

I just began a new position as research assistant professor at the University of Florida under a K12 award through the Research Rehabilitation Career Development program (Ken Ottenbacher is the PI). Dr. Sherrilene Classen is my mentor, and I’m thrilled to have such an incredible opportunity. Having funding for an independent project during my postdoc also undoubtedly helped launch me into the next phase of my career by making me a stronger candidate for the K12 program!

Amber Angell, PhD, OTR, 2018 Nedra Gillette Endowed Research Fellow

The 2018 Nedra Gillette Endowed Research Fellow was Amber Angell, PhD, OTR, of the University of Illinois at Chicago. Dr. Angell worked with a local nonprofit, Urban Autism Solutions, to increase residents’ community participation and self-determination and to inform the future design of an interest-based occupational therapy intervention for a larger sample of young adults with ASD. Dr. Angell’s mentors were Joy Hammel, PhD, OTR/L, FAOTA and Susan Magasi, PhD.

Academy of Research Inductees

Bernadette Nedelec, PhD, BScOT(C)

Dr. Nedelec is an Associate Professor and the former Director of the Occupational Therapy Program, School of Physical and Occupational Therapy at McGill University, Montréal, Québec, Canada. Her research interests focus on the rehabilitation of people who have sustained a major burn injury with a particular interest in the evaluation and treatment of hypertrophic scar. The formation of hypertrophic scar is considered one of the most important long-term consequences of...
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Special Thank You to occupationaltherapy.com
AOTF’s VIP reception honored our major donors, conference sponsors, volunteers, and leadership. Kathleen Lyons, ScD, OTR/L, a 2017 Intervention Research Grant recipient and Chair of the 2018 AOTF Planning Grant Collective on cancer survivors, provided a “mission moment”. Dr. Lyons shared her thoughts on the impact of AOTF research funding on her career and her recent participation in the Collective. A celebration of Fred Sammon’s 90th birthday complete with a birthday cake capped off the evening.
The Breakfast with a Scholar featured poet Molly McCully Brown. Ms. Brown read selections from her prizewinning collection of poems, *The Virginia State Colony for Epileptics and Feebleminded* and spoke eloquently about the impact of the words we choose when speaking about disability. A full house gave Ms. Brown a standing ovation. The State of the Science Symposium topic was Functional Cognition: The OT Lens on Occupational Performance. Carolyn Baum, PhD, OTR/L, FAOTA moderated the panel and introduced the topic. Symposium speakers included Deirdre R. Dawson, PhD, OT Reg. (Ont.), Robin Newman, OTD, OTR/L, CLT, CDRS, Juleen Rodakowski, OTD, MS, OTR/L, and Timothy J. Wolf, OTD, PhD, OTR/L, FAOTA.
St. Catherine Challenge: Students Supporting OT Research

2018 was another successful year for the St. Catherine Challenge with 44 schools raising over $44,000 to support AOTF Intervention Research Grants. This student-led fundraising initiative engages emerging occupational therapists with the mission of AOTF and helps provide seed funding for early OT research. We are so proud of the creativity, dedication, and enthusiasm our participating schools demonstrated this year – raising the most money in the Challenge’s history!

Thank you to all the schools who participated in the 2018 Challenge. We look forward to an even greater 2019 Challenge. We encourage all OT programs and all alumni of participating schools to support this important philanthropic initiative.

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University of Oklahoma HSC
University of South Dakota
University of Texas Medical Branch at Galveston
University of Tennessee HSC
University of Wisconsin - La Crosse
West Coast University
West Virginia University

The IRG provided me with an opportunity to frame my research with a strong occupational therapy underpinning… because the IRG emphasizes collaborative work, I was able to initiate a collaboration with a cognitive neuroscientist who brought an entirely new perspective to my work. AOTF IRG funding is vital for the occupational therapy profession to allow researchers to explore novel research from an occupational therapy perspective and to spur collaborations with researchers in other professions who are unaware of the integral role that occupational therapists bring to rehabilitation research.

Simone V. Gill, PhD, OTR, 2015 Intervention Research Grant Recipient
Why Give

Today, in the value-based healthcare environment in which patients, practitioners, policymakers and payers operate, the demand for evidence is paramount. By implementing the principals of evidence-based practice into occupational therapy, OTs have been able to utilize scientific research to improve client interventions, address unique and universal challenges in healthcare delivery and transform lives. The research funded by AOTF advances the science of OT to improve the quality of lives for all people, regardless of age or ability. Specifically, AOTF fulfills a critical gap in supporting early stage grants for OT research. Each year, philanthropic gifts provide the valuable resources OT investigators need to generate new evidence, enhance the quality of care, and strengthen the OT profession. Please join our community, donate, and together we will Build Evidence to Improve Practice and Health.

OPPORTUNITIES IN PLANNED GIVING

Florence Cromwell was an exceptional figure in occupational therapy whose leadership had a transformative impact on our profession and whose legacy will influence generations of OTs. While Florence passed away in 2016, she will continue to play an active role in the future of OT because she established an AOTF scholarship with a bequest gift. A planned gift is a wonderful way to support the future of the field and leave a lasting legacy. AOTF is extremely grateful to the generous gift by Dr. Cromwell and all our planned giving donors. Consider your impact on the future of OT research today.

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Kathryn Williams, University of North Carolina at Chapel Hill

The Ruth Peterson Memorial Endowed Scholarship of the Kappa Chapter, Pi Theta Epsilon, University of North Dakota - $750

Emily LaBlanc, University of North Dakota

The Ohio Occupational Therapy Association Endowed Scholarship - $4,000 each

Laura Fish Rucki, The Ohio State University

continued on page 13
OTJR Increased Impact Factor and Wilma L. West Library Continues to Grow

**OTJR: Occupation, Participation and Health**, AOTF’s peer-reviewed research journal, increased its impact factor to 1.00, a 26% increase from the previous year. This is the highest number the journal has ever achieved. This steady growth represents the hard work and meaningful contributions that the Editor-in-Chief Sherrilene Classen, PhD, MPH, OTR/L, FAOTA, FGSA, University of Florida, and thirteen Associate Editors have made over the last few years.

The Wilma L. West Library and Archive reached a milestone this year as OT SEARCH, the online public access catalog, grew to over 50,000 entries. Monographs (books) and material from over 50 journals are added on a weekly basis. In addition, the collection includes over 230 dissertations and 900 master’s theses.

Pi Theta Epsilon — Supporting Excellence in Occupational Therapy

Pi Theta Epsilon, the national occupational therapy honor society, continues to advance its mission to support occupational therapy by promoting research, leadership, and scholarly activities. One hundred and twenty schools now have active chapters, with Nebraska Methodist College, Missouri State University, Arkansas State University, Gannon University in Ruskin, Florida, and Wesley College joining PTE in 2018.

The 2018 PTE Mary J. Bridle First Research Award recipient was Rylie Power, an OTD student at Virginia Commonwealth University for her study, *The Impact of Mild Traumatic Brain Injury (mTBI) on Romantic Relationships*. The award fosters scholarship and first research efforts within the OT community of students, young practitioners, and early researchers.

PTE’s successful partnership with OccupationalTherapy.com to offer free continuing education credits to its alumni and lifetime members continued for a second year. During 2018, three courses were offered: Evidence-based Intervention for Balance & Falls Prevention, Creating the Evidence in Clinical Practice: Case Study and Single Subject Research, and Seating for Special Populations: Pediatric, Geriatric, Bariatric, and Degenerative.

**2018 SCHOLARSHIP RECIPIENTS** CONTINUED FROM PAGE 12

<table>
<thead>
<tr>
<th>The Oklahoma Occupational Therapy Association Endowed Scholarship</th>
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<tbody>
<tr>
<td>Kate-Lynn Duethman, University of Oklahoma at Schusterman Health Sciences Center - $1,000</td>
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<td>Hannah Blanden, University of Oklahoma Schusterman Health Sciences Center - $430</td>
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<th>The Occupational Therapy Association of Oregon Endowed Scholarship - $500</th>
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<td>The Harlan and Rita Temple South Dakota Occupational Therapy - $1,098</td>
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<td>Kenna Wieczorek, University of South Dakota</td>
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<th>The Texas Occupational Therapy Association Endowed Scholarship</th>
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<td>Emily Guberman, Texas Tech University Health Sciences Center - $1,887</td>
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| Michele Holman, Austin Community College - $1,500 |
| Utah Occupational Therapy Association Endowed Scholarship - $1,000 |
| Jenna Euteneier, University of Utah |

| The Fred Sammons Endowed Scholarship of the Virginia Occupational Therapy Association - $1,542 |
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STAFF CHANGES IN 2018

Mindy A. Hecker, MBA, MLS, joined AOTF on September 7, 2004 as librarian. She took over the role of Director of Information Resources and the Wilma L. West Library in 2007 and became the Associate Executive Director for Administration in October 1, 2010. On June 30, 2018, Mindy retired from her position as Associate Executive Director. She continues as the Director of Information Resources on a part-time basis. Jeanne Cooper was promoted to the role of Chief Operating Officer in June. Gabriel Garcon joined the Foundation as the Executive Assistant and Natasha Bragg is the new Member and Program Coordinator for Pi Theta Epsilon and the St. Catherine Challenge.
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.

The Foundation incurred expenses in the following programmatic categories from October 1, 2017–September 30, 2018:

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<th>PROGRAM EXPENSES</th>
<th>2018</th>
<th>2017</th>
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<tr>
<td>Research</td>
<td>$619,043</td>
<td>$594,653</td>
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<td>Education</td>
<td>$333,976</td>
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<td><strong>Total Program Services</strong></td>
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<td><strong>$937,736</strong></td>
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<th>SUPPORT SERVICES</th>
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<tr>
<td>General and administration</td>
<td>$410,097</td>
<td>$397,544</td>
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<tr>
<td>Marketing and development</td>
<td>$272,846</td>
<td>$246,439</td>
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<td><strong>Total Support Services</strong></td>
<td><strong>$682,943</strong></td>
<td><strong>$643,983</strong></td>
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**Total Expenses** $1,635,962 $1,581,719

**STATEMENT OF FINANCIAL POSITION SEPTEMBER 30**

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<tr>
<th>ASSETS</th>
<th>FY 2018</th>
<th>FY 2017</th>
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<td>Cash and Cash Equivalents</td>
<td>$256,905</td>
<td>$308,350</td>
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<td>Inventory</td>
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<td>Prepaid Expenses and Other Assets</td>
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<td>$9,828</td>
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<td>Interest Receivable</td>
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<td>Contributions Receivable</td>
<td>$849,642</td>
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<td>$14,717</td>
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<td>Due from AOTA</td>
<td>$9,278</td>
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<td>Investments</td>
<td>$26,023,239</td>
<td>$24,254,208</td>
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<td>Beneficial Interest in Remainder and Perpetual Trusts</td>
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<td>$2,223,530</td>
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<td>Property and Equipment, Net</td>
<td>$43,868</td>
<td>$15,627</td>
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<td><strong>TOTAL ASSETS</strong></td>
<td><strong>$29,424,583</strong></td>
<td><strong>$27,174,788</strong></td>
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<th>LIABILITIES AND NET ASSETS</th>
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<td>Liability for Future Interest in Pooled Income Fund</td>
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<td>Capital Lease Obligation Total</td>
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<th>NET ASSETS</th>
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<td>Unrestricted:</td>
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<td>Temporarily Restricted</td>
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<td><strong>TOTAL NET ASSETS</strong></td>
<td><strong>$29,242,772</strong></td>
<td><strong>$27,054,517</strong></td>
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Copies of the complete audit report prepared by CliftonLarsonAllen, LLP may be obtained by writing to AOTF at 4720 Montgomery Lane, Bethesda, MD 20814.
The American Occupational Therapy Foundation is immensely grateful to our generous donors during the fiscal year 2018 (October 1, 2017 – September 30, 2018). As a supplement to our 2018 Annual Report, we are including a complete list of our donors.

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Florence Cromwell
Bonita Kraft
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North Coast Medical, Inc
Kathlyn Reed

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Gretchen Makinson
Ethel Mandelbaum
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Ann McDonnell
Diane McGinnis
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Jean Pennucci
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Elizabeth Pfeiffer
Shawn Phipps
Jan Polgar
Janet Poole
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Katherine Post
Susan Price
Samia Rafeedie
Lorie Richards
Catherine Risigo-Wickli
Sandra Rogers
Caroline Rose
Leslie Roundtree
Donna Rubin
Maureen Russell
Debra Rybski
Phyllis Samara
Karen Sames
Kazuco Saruwatari
Gretchen Schmaiz
Debra Scurluck
Rosemary Seppi
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Judy Sheehan
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Andrea Tyszka
Lynne Umbarger
Shelley Wallock
Laura Wilkinson
Jane Willis
Stacey Willis
Wenbo Yang
Jayne Yatzak

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Christine Abbott
Judith Abe-Ishibashi
Elaine Adams
Avis Adams
Allie Adams
Bayla Adelma
Pippa Ader
Osarume Adodo
Vanessa Aguilar
Brock Albee
Jennifer Albright
Katie Alexander
Susan Alexander
Ana Allegretti
Denise Allen
Christopher Allen
Dorene Allis
Jacqueline Allotey
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Jenni Kluever
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Jacqueline Knowles
Joanne Knowles
Susan Knox
Carol Knox
Hallie Knuth
Amy Koch
Heather Koch
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Shannon Manigault
Sarah Mannes
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Erin Marcy
Mallory Marder
Tambra Mark
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