Founded in 1965, the American Occupational Therapy Foundation (AOTF) is a charitable nonprofit organization devoted to advancing the science of occupational therapy. The Foundation administers the profession’s largest library and bibliographic database, awards more than 50 scholarships and fellowships annually, coordinates a network for doctoral candidates in the field and publishes a professional research journal.

The Vision of AOTF
Enhancing health for all people through meaningful participation in everyday life.

The Goals or Strategic Ends of AOTF

Leadership Development
To facilitate the development of current and potential leaders in occupational therapy.

Financial Stability
To grow the Foundation’s capacity to pursue its mission.

Public Awareness
To increase public and professional knowledge and understanding of:
- The health benefits of participation in everyday activities.
- The unique contribution of occupational therapy to health and quality of life.

Research
To support research initiatives that grow capacity and advance best practices in occupational therapy.

Education
To support educational initiatives that strengthen the profession of occupational therapy.

Technology
To foster the use of technology to improve practice and enhance quality of life.

The Strategic Plan of AOTF
The AOTF Board of Directors approves a strategic plan every 2-3 years, during which its goals or strategic ends are determined. The current strategic ends were approved in March 2011.

The Mission of AOTF
AOTF advances research, education and public awareness for occupational therapy so that all people may participate fully in life regardless of their physical, social, mental, or developmental circumstances.
Dear Colleagues,

I recently attended the inaugural Research Summit in St. Louis, and I was impressed with the wide range of research reported there. Doctoral students, post-doctoral fellows, emerging scientists and senior scientists came together in that event to share their work and their perspectives on the elements necessary for success, and to provide feedback to AOTF and AOTA on directions for the future.

It is notable that this event was sponsored by an academic consortium consisting of Washington University in St. Louis (the hosts), the University of Southern California, the University of Illinois at Chicago, and Thomas Jefferson University. Over twenty-five years ago, the profession recognized the need to foster research development in the field. AOTF and AOTA had a joint Research Advisory Council that made recommendations about various initiatives, including research partnership seed grants, doctoral fellowships, programs of education in research, and research recognition. The AOTF Academy of Research in occupational therapy, now with nearly fifty members, was a product of that era.

A quarter century and many thousands of dollars of support later, remarkable things have happened. I conclude from this that research development efforts take time, and that they require resources. AOTF is not able to compete with large foundations or the federal government in funding research, but we are able to focus on key enabling activities, such as promoting consortia, providing seed grants, supporting the development of grant-writing skills, and disseminating information.

One clear message from the summit was that partnerships and collaborations, both within and outside the field, are vital to success. AOTF will continue to work hard to support the development of scientists and research, to use our resources wisely, and to partner with other organizations, including AOTA, to advance the science of the field. As a public charity, we will do so because we fervently believe that occupational therapy is a service vital to public health.

Diana L. Ramsay, MPP, OTR/L, FAOTA
President

The AO TF – the American Occupational Therapy Foundation – is a nonprofit organization dedicated to supporting our profession today and for the future. With a stronger profession, we can help more people participate fully in life, regardless of their physical, social, mental, or developmental circumstances.

Gifts to AOTF help us continue to make a real difference for so many people in our profession through…

- Scholarships
- Research support and publications
- Development and recognition of leadership
- Education and maintaining the largest collection of occupational therapy resources in the country.

The American Occupational Therapy Foundation has made every effort to provide a complete and accurate report recognizing our donors. If we have made an error, please notify us at PO Box 31220, 4720 Montgomery Lane, Bethesda, MD 20824-1220 or aotf@aotf.org. Please also write us if you wish to have your name removed from the list to receive fundraising requests to support AOTF in the future.
**AOTF Events Highlighted at AOTA Annual Conference**

The Foundation continued its tradition of offering scholarly and special events at the AOTA Annual Conference. The 2011 Conference was held in Philadelphia, Pennsylvania.

The American Occupational Therapy Foundation and the American Occupational Therapy Association continue to jointly support the **Leadership Mentoring Fellowship Program** to advance leadership development. Beginning in 2007, this program has fostered the emergence of strong occupational therapy leaders within the academic community, while building the profession’s capacity to influence and lead. Through 2011, 73 individuals have completed the rigorous nine-month fellowship. The 2011 Leadership Mentoring Fellowship Reunion again offered valuable opportunities for peer mentoring and networking.

The AOTF **Doctoral Network (DocNet)** supports occupational therapy practitioners engaged in doctoral education by providing networking opportunities and encouraging collaboration among emerging and established scholars. Each year, the DocNet sponsors an event which includes small group mentoring, a speaker and reception. This year, AOTA/ AOTF Research Advisory Panel Chair Shelly Lane, PhD, OTR/L, FAOTA presented current research priorities identified by the AOTA/AOTF Research Advisory Panel.

Since 1982, the prestigious **Research Colloquium** has presented distinguished researchers who discuss their work in occupational therapy and occupational science. The 2011 Colloquium, offering special recognition to Pi Theta Epsilon, the national honor society for occupational therapy, featured presentations on **Sensory Processing Disorders in Occupational Therapy: Mapping Pathways of Understanding from Cages to Clinics to Communities**. Grace Baranek, PhD, OTR, FAOTA, Stacey E. Reynolds, PhD, OTR/L, and Mary Schneider, PhD, OTR, were speakers and Shelly Lane, PhD, OTR/L, FAOTA, was the moderator. The student panel consisted of Miriam Adkins, Lauren Little and Jessica Lynn.

**18th Annual AOTF Breakfast with a Scholar Features Dr. Ruth Purtilo**

The Foundation’s annual Breakfast with a Scholar brings thought-provoking and relevant ideas from other disciplines to enrich and broaden the understanding of occupation.

Internationally acclaimed writer, lecturer, and health care ethicist, Ruth Purtilo was the scholar in residence at the 2011 Breakfast with a Scholar. Her presentation, “A Conversation About Moral Courage,” provided a thought-provoking discussion of how the intersection of human values and health care practices often creates collision and creates vexing moral dilemmas that demand careful reflection and wise counsel.

Formally educated in physical therapy at the University of Minnesota and holding a master of theology and PhD degrees from Harvard University, Dr. Purtilo has held prestigious endowed appointments and fellowships at Creighton University, the MGH Institute for the Health Professions in Boston, Yale University and the Karolinska Institute in Stockholm. Dr. Purtilo is the author of six ethics books and over 100 compelling articles, and was a leading voice recognizing the social policy dilemmas associated with the HIV/AIDS epidemic.

The 2011 Breakfast with a Scholar was generously sponsored by Sand Hill Global Advisors and Donald Lang.

**Dissertation Research Grants Awarded**

AOTF is pleased to announce six Dissertation Research Grant recipients in 2011.

**Karen Atler,** Colorado State University  
**Assessing the convergent and consequential validity of the daily experiences of pleasure, productivity, and restoration profile**

**Tracy Chippendale,** New York University  
**The effects of life review through writing on depressive symptoms and life satisfaction in older adults**

**Karen Harpster,** Ohio State University  
**Examining sensory processing in young children with and without early signs of autism during the second year of life**

**Young Joo Kim,** University of Pittsburgh  
**Functional outcomes II**

**Shawn Phipps,** Touro University  
**The effect of cerebral palsy on self-care, mobility, and social function**

**Rosa Roman-Oyola,** Virginia Commonwealth University  
**Sensory modulation disorder in Puerto Rican preschoolers: associated risk factors**

The AOTF has been awarding Dissertation Research Grants since 2005. Over thirty grants have been given to occupational therapy doctoral students.
The American Occupational Therapy Foundation extends its thanks to the generous sponsors, dancers, judges, silent auction donors and guests of its 2011 Gala, which featured the second annual Dancing with the Stars competition. The event, held at the Loews Philadelphia Hotel, raised approximately $50,000 to support AOTF research and education programs.

Dancers, judges and hosts celebrate a successful event.

Grand Prize Winners Francie Baxter and Brent Braverman were sponsored by F.A. Davis Company.

Jane Case-Smith and Thomas Fisher were sponsored by Elsevier and Zaner-Bloser.

Kendra Garcia and Jennifer Cruz were sponsored by SpiderTech.

Maryanne Sacco and Vince Wilson were sponsored by Slack Incorporated.

Barbara Rider and Fred Sammons were sponsored by the AOTF Board of Directors.

Gala hosts Betsy Francis–Connolly and Shawn Phipps and judges Mark Biehl, President and CEO, North Coast Medical, Inc; Paul Grace, Executive Director NBCOT; Fred Somers, Executive Director AOTA; and professional dancer Amanda Fanelli added excitement to the Gala.

Kathleen Matuska and John White were sponsored by AOTA Press.

GALA SPONSORS:
North Coast Medical Inc.
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American Occupational Therapy Association
National Board for Certification in Occupational Therapy
Dr. Kristine Haertl and Mr. Wayne Keplinger

Elise and Gregory Dew were sponsored by Bioness.

Kristine Haertl and Wayne Keplinger were sponsored by Sand Hill Global Advisors.

Melissa Cohn and Michael Berthelette were sponsored by Progressus Therapy.
AOTF Honors Academy of Research Inductees

Established in 1983, the AOTF Academy of Research in occupational therapy recognizes individuals who have made exemplary and distinguished contributions toward the science of occupational therapy. We are pleased to honor the 2011 inductees: Suryakumar Shah, PhD, OTD, MEEd, OTR, FAOTA and Susan Murphy, ScD, OTR/L.

A member of the faculty of Richard Stockton College of New Jersey, Dr. Suryakumar Shah has worked for 50 years in four continents as a researcher, private practitioner, and educator, a program chair and has been a professional and personal mentor to many individuals. His research interests are many with a greater focus on stroke incidence, stroke and brain injury measurement and rehabilitation outcomes, and dependency needs of people with disability. Dr. Shah’s research has been cited often and he has presented nationally and internationally and served on many editorial boards. In addition, Dr. Shah participates in a number of evaluative initiatives and collaborates with researchers around the world.

In addition to serving on the University of Michigan faculty, Dr. Susan Murphy is a Research Health Science Specialist at the Ann Arbor Veteran’s Affairs Health Care System in the Geriatric Research Education and Clinical Center. Her federally-funded research has focused on the examination of fatigue, pain and physical activity in daily life among people with osteoarthritis and the development and testing of a tailored activity pacing intervention based on an individual’s symptom and physical activity patterns. Dr. Murphy holds important leadership roles and engages in service at the national level. She was appointed and currently serves as associate editor of the American Journal of Occupational Therapy (AJOT) and has written two Centennial Vision papers on geriatric research as well as papers promoting evidence-based practice. Her unique model of promoting evidence-based practice has successfully mentored and funded clinician investigators’ research projects.

Sarah Schoen Receives Virginia Scardina Award of Excellence

Dr. Sarah Schoen is Assistant Director of Research at the Sensory Processing Disorder (SPD) Foundation. She is an occupational therapist with 28 years of clinical experience and a doctorate in occupational therapy from New York University. In 2002, she was accepted for the Developmental Psychobiology Research Group two-year post-doctoral fellowship at the University of Colorado, Denver. Dr. Schoen teaches Advanced Mentorship trainings at the SPD Foundation and is Assistant Professor at the Rocky Mountain University of Health Professions. She has advanced training in Sensory Integration Therapy and Neurodevelopmental Treatment. In 1997, Dr. Schoen received the Recognition of Achievement Award.

Stephen Wilburn Receives Certificate of Appreciation

Stephen Wilburn has worked in the financial services industry for over 30 years. As Senior Vice President and Wealth Advisor at Morgan Stanley Smith Barney, Mr. Wilburn has served a number of foundations, non-profit corporations and individuals throughout the United States. Prior to his current role, he held senior roles in the investment banking industry, providing capital and expertise to guide mergers and acquisitions throughout the world. Mr. Wilburn has shared his expertise in corporate finance and international business as an adjunct faculty member in Southern California. His service as financial advisor over the past 12 years earned the respect and appreciation of the AOTF Board of Directors.
Cynthia Epstein and Ruth Ann Watkins Receive AOTF Meritorious Service Award

Cynthia Epstein is President and Executive Director of Occupational Therapy Consultants, Inc. She has led her organization during the past 30 years and expanded their community-based services to include delivery of occupational, physical, speech therapy, and consultation services across the developmental spectrum. Ms. Epstein is a widely known lecturer and author and has been recognized at national, state and local levels for her many contributions. Ms. Epstein served on the American Occupational Therapy Foundation Board of Directors for more than six years. During her tenure, she served as chair of the Awards of Recognition Committee and brought a wealth of experience and insightful perspectives to the AOTF Board in support of its vision and mission to advance the profession of occupational therapy for the greater good of society. Ms. Epstein gives generously of her time and personal resources, and is an ardent advocate for the profession and the need to expand scientific knowledge in the field along with its translation into practice.

Ruth Ann Watkins spent much of her professional career at the Rehabilitation Institute of Chicago where she began as an occupational therapist and advanced to the positions of vice president of Allied Health and vice president of Marketing and Communications. In 1991, she founded Out & About, Inc., a company that provided individual outings for seniors. Ms. Watkins has held faculty positions at Northwestern University Medical School and the University of Illinois at Chicago. Ms. Watkins served as a member of the American Occupational Therapy Foundation Board of Directors for more than twelve years. During her tenure with the AOTF Board, she served as chair of the Nominating Committee and president of the Board of Directors. Ms. Watkins’ experience in strategic planning, combined with her knowledge and expertise in board governance, contributed greatly to supporting AOTF’s work in advancing science in occupational therapy and communicating the results. Her commitment to the role of occupational therapy in adding value to the health care system has been unwavering throughout her service.

Foundation Partners with Patterson Foundation to Encourage Volunteerism

The American Occupational Therapy Foundation presented five volunteerism awards in 2011 with its inaugural recognition of recipients for the AOTF/Patterson Foundation Awards for Community Volunteerism. The awards were made possible through a grant to AOTF from the Patterson Foundation of St. Paul, Minnesota. The purpose of the award was to recognize outstanding acts of volunteerism by practicing therapists who provide important services to members of their communities. Both AOTF and the Patterson Foundation recognize that in every community, there are deserving individuals who need health care services and can benefit from occupational therapy but may not have access because of their personal circumstances. The volunteerism award was created to help address such unmet needs, emphasize the responsibility that comes with being a professional and encourage others to serve as role models through their acts of volunteerism.

Recipients of the award in 2011 included Dr. Patricia Coker-Bolt, a founding board member of the Charleston, South Carolina, Miracle League, an all-volunteer baseball league for children and adults with disabilities; Dr. Yvette Hachtel, who serves men who are chronically homeless in Nashville, Tennessee; Dr. Debra Lindstrom Hazel, of Kalamazoo, Michigan, co-creator of an educational program designed to help individuals remain in their homes; Deborah Whitcomb, founder of the Cincinnati Occupational Therapy Foundation; and Catalina Zobel of Media, Pennsylvania, a dedicated and creative volunteer with the ACTS Lima Estates Continuing Care Retirement Community (CCR).
Kim Schoessow Takes the Reins as PTE President

Kim Schoessow has been elected to serve as president of Pi Theta Epsilon, the occupational therapy honor society. Dr. Schoessow follows Melissa Oliver, who served in that role for eight years.

A graduate of the clinical doctorate program at Washington University in St. Louis and completing the graduate certificate in the low vision rehabilitation program at the University of Alabama at Birmingham, Dr. Schoessow works as an occupational therapist in private practice at the Frank Stein & Paul S. May Center for Low Vision Rehabilitation in San Francisco. She also works as a research health science specialist in the Vision Rehabilitation Research Lab at the VA in Palo Alto. Previously she worked at the Massachusetts Eye and Ear Infirmary in Boston and was an instructor in ophthalmology at Harvard Medical School. She has presented and been published at both the national and international level. The other PTE officers are: Emily Kringle, Vice President; Sally Stevenson, Secretary; and Rachel Proffitt, Treasurer.

Other PTE highlights include:

- Annual business meeting held during the AOTA/NBCOT National Student Conclave in Providence, Rhode Island.
- “Chapter in a Box,” a how-to guide for new and growing PTE chapters created in collaboration with AOTF.
- Expanded use of Twitter, Facebook and other social media
- Annual President’s Award presented to the Boston University chapter for organizing and implementing outstanding scholarly activities.
- PTE participated in a faculty workshop at the AOTA Annual Conference.
- Regional representatives reorganized by geographic area to increase opportunities for PTE members to meet.
- Erin Eltzmann, representing the Washington University in St. Louis chapter of PTE served as the guest speaker at the Kappa Delta Phi Sorority 84th National Convention.
- The Pi Theta Epsilon Martha Kirkland Leadership Legacy Scholarship was endowed through the AOTF Scholarship Matching Grant Program.

Grant Award Funds ACTOR Conference

The Agency for Healthcare Research and Quality awarded AOTF and the AOTA funds for a special conference on planning, designing, and conducting intervention research.

The Accelerating Clinical Trials and Outcomes Research Conference (ACTOR), held in December 2011, provided early- and mid-career scientists in occupational therapy, physical therapy, and speech-language pathology with the opportunity to gain basic information about the process of planning, funding, and conducting intervention research. Speakers at the conference included: AOTA President Florence Clark and AOTF President Diana Ramsay, John Whyte, MD, PhD, Laura Gitlin, PhD, Bradley Evanoff, MD, Stephen Page, PhD, Wendy Caster, PhD, Linda Tickle-Degnen, PhD, Robert Sainburg, PhD, Catherine Backman, PhD, M. Carolyn Baum, PhD, AOTF Executive Director Charles Christiansen, EdD, and AOTA Director of Research, Susan Lin, ScD.

Ellen Cohn and Jane Koomar Receive A. Jean Ayres Award

Dr. Ellen Cohn has shown a significant and sustained commitment to promoting best practice nationally and internationally, within and beyond the occupational therapy field, by advancing theory and disseminating occupational therapy knowledge. Her scholarship and service has enhanced the understanding of occupational engagement patterns of children and youth, the experiences of parents of children with special needs, research methodologies within occupational science and occupational therapy practice, and clinical reasoning as an element of reflective practice. She has influenced the theoretical constructs included in numerous American Occupational Therapy Association official documents and exemplifies the qualities of the A. Jean Ayres Award recipient.

Dr. Jane Koomar is professor of practice at Tufts University’s Boston School of Occupational Therapy. She is the founder and owner of Occupational Therapy Associates-Watertown, a private practice specializing in sensory integration assessment and interventions. She also heads the Spiral Foundation, a non-profit organization dedicated to research and education related to sensory processing disorder. Dr. Koomar has served as the chairperson of the Sensory Integration Special Interest Section of AOTA, and has published and taught extensively in the area of sensory integration theory and intervention.
AO TF Scholarship Matching Grants Program Inspires Twenty-five Endowments

An anonymous legacy gift in 2010 created a special opportunity for the Foundation and its many friends. The AO TF Board of Trustees approved matching funds to increase the size and number of scholarships awarded through the AO TF scholarship endowment program, providing a dollar-for-dollar match for any new funds contributed to an endowed scholarship in 2011.

Unprecedented in the history of AO TF, this program reflects the Foundation’s concern about the rising costs of professional education and its commitment to partner with colleagues in the occupational therapy community to provide scholarships that offset the educational costs associated with becoming a practitioner.

Endowed scholarships continue in perpetuity, supporting future generations of professionals and leaders in occupational therapy and touching countless others who will benefit from their expertise.

AO TF congratulates the following program participants:

- The Adelaide Ryerson Smith Memorial Endowed Scholarship of the Arizona Occupational Therapy Association
- The Assembly of Student Delegates Endowed Scholarship
- The Chris Ebbers Endowed Scholarship of the South Carolina Occupational Therapy Association
- The District of Columbia Occupational Therapy Association Endowed Scholarship
- The Florida Occupational Therapy Association Myra McDaniel Scholarship Endowment
- The Gary W. Kielhofner Graduate Fellowship in Occupational Therapy
- The Harlan and Rita Temple South Dakota Occupational Therapy Association Endowed Scholarship
- The Julia E. Sweeney Endowed Scholarship of the New Mexico Occupational Therapy Association
- The Kansas Occupational Therapy Association Endowed Scholarship
- The Martha Kirkland Leadership Legacy Pi Theta Epsilon Endowed Scholarship
- The Mary Eileen Dixey Endowed Scholarship of the New Hampshire Occupational Therapy Association
- The National Board of Certification in Occupational Therapy Endowed Scholarship
- The Nedra Gillette Endowed Research Fellowship in Occupational Therapy
- The Network for Lesbian, Gay, Bisexual and Transgender Concerns in Occupational Therapy Endowed Scholarship
- The New York State Occupational Therapy Association Endowed Scholarships
- The North Carolina Occupational Therapy Association Endowed Scholarship
- The Occupational Therapy Association of Oregon Endowed Scholarship
- The Ohio Occupational Therapy Association Endowed Scholarships
- The Oklahoma Occupational Therapy Association Endowed Scholarship
- The Ruth Peterson Memorial Endowed Scholarship of the Kappa Chapter of Pi Theta Epsilon at the University of North Dakota
- The Texas Occupational Therapy Association Endowed Scholarship
- The Utah Occupational Therapy Association Endowed Scholarship
- The Washington Occupational Therapy Association Endowed Scholarship
- The West Virginia Occupational Therapy Association Charlotte Prudich and Elizabeth B. Devereaux Endowed Scholarships
- The Wisconsin Occupational Therapy Association Endowed Scholarship

“I can’t imagine where I’d be today if not for the OTs who have given me so much help and encouragement.”

– Harlan Temple, grateful recipient of OT services

Harlan and Rita Temple Endow Scholarship With South Dakota Occupational Therapy Association

Harlan K. Temple, a successful businessman and farmer, and his wife Rita, residents of rural Davis, South Dakota, are believers in the value and importance of occupational therapy. Working in collaboration with the South Dakota Occupational Therapy Association (SDOTA), the Temps have endowed a perpetual fund to support the education of occupational therapy students in South Dakota.

Temple was diagnosed with cerebral palsy and uses a powered wheelchair for mobility and, for more than eight years, he and his wife have offered their farm as a site for occupational therapy classes. The students learn about occupational issues unique to a farm and ranch population and specifically farming and ranching with a disability. They receive a firsthand look at the modifications and adapted strategies that Temple has used in order to complete farm tasks. Since 2003, 150 occupational therapy students have visited the Temple’s farm.

“God has blessed us in so many ways that we wanted to share our blessings by leaving a legacy with occupational therapy students for their education,” said Temple, who enjoys meeting all of the students and learning about why they decided to pursue a career in occupational therapy.
AOTF Announces 2011 Scholarship Recipients

PROFESSIONAL MASTER’S DEGREE IN OCCUPATIONAL THERAPY

North Coast Medical Scholarship
- $5,000 each
  Whitney Mullins
  The University of Texas, Medical Branch

Svea Van Langenhoven
Tufts University – Boston School of Occupational Therapy

Kappa Delta Phi Scholarship
- $2,000 each
  Deborah Wiedeman
  Midwestern University-Glendale Campus

Mary Balza
Florida Gulf Coast University

Willard & Spackman Scholarship
- $2,000 each
  Melissa Brandt
  Grand Valley State University

Danielle Shea
University of Mary

Mary Fiorentino Scholarship
- $1,200 each
  Erica Pugh
  University of the Sciences in Philadelphia

Hannah Allard
Saint Francis University

Naida Ackley Memorial Scholarship
- $1,000
  Melissa Turpin
  Medical University of South Carolina

Renee Achter Scholarship
- $1,000
  Allison Nowalk
  The Medical College of Georgia

Edith Weingarten Memorial Scholarship
- $1,000
  Rachel Francis
  The University of Illinois at Chicago

Diane Blicksilver Aja Memorial Scholarship
- $1,000
  Britteny Godar
  Indiana University

ASSOCIATE DEGREE IN OCCUPATIONAL THERAPY

AOTA Assembly of the Student Delegates (ASD) Scholarship
- $600
  Karen Thorp
  University of Southern Maine at Lewiston-Auburn College

AOTA Assembly of the Student Delegates (ASD) Scholarship
- $600
  Darton College

Carlotta Welles Scholarship
- $500 each
  Toni Duncan
  Shawnee State University

Linda Femmer
Saint Louis Community College at Meramec

The Florence Wood Arkansas Occupational Therapy Association Scholarship
- $500
  Whitney Holloway
  The University of Central Arkansas

The Occupational Therapy Association of Colorado Scholarship
- $400
  Roxanne Bosse
  Colorado State University

The Kansas Occupational Therapy Association Scholarship
- $750 each
  Mark Burghart
  The University of Kansas Medical Center

Dorene Dodson
Washburn University

The Henrietta Price Scholarship of the Maryland Occupational Therapy Association
- $1,000 each
  Abigail McNair
  Towson University

Pamela Boecker
Towson University

The Karen Jacobs Scholarship of the Massachusetts Association of Occupational Therapy
Master’s Degree in Occupational Therapy
- $500
  Alexa Fiorini
  Tufts University – Boston School of Occupational Therapy

 Associates Degree in Occupational Therapy
- $250
  Brenda Lewis
  North Shore Community College

The Michigan Occupational Therapy Association
- $500
  Kathleen Garvey
  Eastern Michigan University

The Mary Eileen Dixey Scholarship of the New Hampshire Occupational Therapy Association
- $2,000 each
  Lauren Campbell
  University of New Hampshire

“Receiving an AOTF scholarship gives powerful recognition that helping people is valued by others.”
– Anna, single mom and scholarship recipient

AO TF – STATE ASSOCIATION SCHOLARSHIPS

The Occupational Therapy Association of Arkansas Scholarship
- $500
  Whitney Holloway
  The University of Central Arkansas

“The American Occupational Therapy Association announces 2011 Scholarship Recipients.”

10
The New York State Occupational Therapy Association Scholarship - $1,000 each
Jaclyn Shapiro
Stony Brook University
Simi Zilber
State University of New York Downstate Medical Center
Caryn Shore
State University of New York Downstate Medical Center

The North Carolina Occupational Therapy Association Scholarship - $750
Suzanne McAlexander
Cabarrus College of Health Sciences

The Ohio Occupational Therapy Association Scholarship - $1,000 each
Elizabeth Gaydos
Ohio State University
Vicki Smith
Stark State College of Technology

The Texas Occupational Therapy Association Scholarship - $2,000 each
Amy Ciatto
Texas Woman’s University, Houston Center
Lori Medina
Saint Philip’s College

The Wisconsin Occupational Therapy Association Scholarship
Master’s Degree in Occupational Therapy - $2,500
Angela Becker
Concordia University Wisconsin
Hanna Ladwig
Concordia University Wisconsin
Leslie Lewison
Western Technical College

Congratulations to the recipients of the 2011 North Coast Scholarship. Pictured from left to right are: Diana L. Ramsay, AOTF President; Whitney Megan Mullins, scholarship recipient, University of Texas, Medical Branch; Mark Biehl, President, North Coast Medical; Svea Van Langenhoven, scholarship recipient, Tufts University - Boston School of Occupational Therapy; and Charles Christiansen, AOTF Executive Director. North Coast Medical, Inc. has generously sponsored this scholarship since 1996 and it is presented to students whose “excellence and high standards demonstrate commitment to the profession of occupational therapy and who will be outstanding leaders in the field.”

National Board for Certification in Occupational Therapy Establishes Endowed Scholarship

The National Board for Certification in Occupational Therapy, Inc. (NBCOT), Gaithersburg, Maryland, a not-for-profit credentialing agency that provides certification for the occupational therapy profession, has endowed annual scholarships to two entry-level occupational therapy students and two scholarships for students in occupational therapy post-professional programs.

“The National Board for Certification in Occupational Therapy is pleased to partner with the American Occupational Therapy Foundation to support students studying to enter the profession of occupational therapy. A solid education provides a foundation for safe, competent practice, and we are proud to support initiatives that enable students to gain the fundamental knowledge and skills required for certification in the profession,” said NBCOT Board Chairperson, Christopher Alterio, Dr OT, OTR.
Securing the Future

The American Occupational Therapy Foundation expresses sincere appreciation for the support provided by so many generous friends during fiscal year 2011 (October 1, 2010 – September 30, 2011), including the American Occupational Therapy Association, whose members contribute to the Foundation through their annual AOTA membership dues.

$10,000 and above
Anonymous 2
Estate of Amy Lind
Fred Sammons
Harlan and Rita Temple
North Coast Medical Inc.
University of St. Augustine

$5000 - $9999
American Occupational Therapy Association
Estate of Marion E. Crampton
Donald F. Lang
Estate of Anita Slominski
Estate of Lyia Mae Spelbring

$2500 - $4999
Anonymous
Cynthia Epstein
Mindy A. Hecker
Kappa Delta Phi Sorority
Oklahoma Occupational Therapy Association
Retirement Research Foundation
Jane and Henderson Rourk
Sand Hill Global Advisors
Ida Miriam Stern
Memorial Fund

$1000 - $2499
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Nancy Drenan
Prendergast
Progressus Therapy LLC
Diana Lee Ramsay
Sophia L. Rydin
SLACK Incorporated

$500 - $999
Anonymous 2
ASCOA University of North Dakota
Karen Frank Barney
Michael Thomas
Berthelette Bette Bonder
Florence Arcuri Clark
Rita Patricia Fleming-Castaldy
Susan J. Harris
Carole Ann Hans
Teresa Arlene Pfeifer
Phi Chapter – PTE,
Virginia Commonwealth University
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Pamela Spears
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Ruth Ann Watkins

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Essie Jacobs
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National Black
Occupational Therapy Caucus
New York Black
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Deborah A. Whitcomb
Carol Hideman Wiley
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Alpha Omicron Chapter – PTE,
University of Toledo
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Marcia Finlayson
Kathleen Eitzen Fleharty
Dorothy R. Fimn
Linda Lou Florey
Lynn F. Foster
Elizabeth Francis-Collopy
Lesa L. Frimmel
Gamma Zeta Chapter – PTE,
University of Findlay
Virginia G. Gessert
Coralie H. Glantz
Susan Graves
Theta Grimaud
Warren J. Gruber
Mary Collins Guenzel
Carol Gwin
Martha Hartgraves
Kimberly Dale Hartmann
Sharone Kay Hay
Allen Heinemann
Irene Louise Herden
Sarah Hertfelder
Hewlett-Packard
Company Foundation
Amanda Kaye Hilton
Jim Hinojosa
Jen Holt
Esther Molder Huecker
Joy Huss
Karen Jacobs
Mary T. Johnston
Beth Jones
Robin A. Jones
Pamalyn J. Kearney
Rosalie M. King
Dinah Kramer
Shelly Jerrine Lane
Catherine A Tromby
Lathain
Michael James Lavole
Claudia Jane Leonard
Dorothy M. Lesch
Deborah Lieberman
Jeanine Marie
Lindenstruth
Lea Augustine Llorens
Sharon Maier-Kennelly
Tina Ann Mankey
Karen Jean Marinovich
Ailene Underhill
McLean
Midwestern University
Rosalie Johanna Miller
MaryAlice H. Morgan
Jean Morgenweck
Julie Nastasi
Joyce O’Neill
Melissa Oliver
Linda M. Olson
Linda L. Orr
Sharon B. Pape
Heidi McHugh Pendleton
G. Robert Pennington
Shawn Christopher Phipps
Merna R. Pick
Ava Pierce
Helen Yooko Pierce
Katherine Margaret Post
Marianne Punchard
Cordelia Hartwell
Puttkamer
Sharon Maggie Reitz
Lyne Richard
Gary Martin Richards
Helene Ross
Denise Anne Rotert
Linda Queen Rudd
Jacquelyn K. Ryan
Deb Sanger
Kathleen Rita Saunders
Barbara Boyd Schell
Mary Magdalena Schmidt
Scott David Schramp
Xyloph Thelma Schwelm
Kathy and Russ Sharpmack
Patricia J. Scott
Janice Lisbeth Seargent
Julie W. Shapemer
Carol A. Siebert
Gayle Green Smith
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Kathy Williams
Jane W. Willis
Wendy Hower Wood
Xi Chapter – PTE,
Washington University
Missi A. Zahoransky
Ruth Zemke
Members of the Legacy Circle have created legacies through bequests or by naming AOTF as a beneficiary of a trust, IRA or insurance policy. Their planned gifts will strengthen our efforts on behalf of occupational therapy and the communities we serve for generations to come. We are grateful to the following individuals for remembering the American Occupational Therapy Foundation in their estates.

Anonymous 3
Jeanette Bair
Esther Bernice Bell
Charlotte Bhasin
Clyde Butz
Charles Christiansen
Marion Crampton
Florence Cromwell
Elizabeth Deichman
Cynthia Epstein
Anne Fisher
Enunice Ford
Frank Gainer
Carol Joan Gryde

Kathryn Gunderson
Carol Gwin
Barbara Hembill
Alice Howe
Joy Huss
Essie Jacobs
Virginia King
Margaret Kirchman
Martha Kirkland
Ruth Rickers Klemmer
Marie Kress
Martha Mae Lasche
Catherine Trombly Latham
Amy Lind

M. Jeanne Madigan
Rosalie Johanna Miller
Maralynne Mitcham
Barbara Neuhaus
Yvonne De Sinson Norton
Carolyn Owen
Helen Marguerite Pollack
Antje Price
Judith Reisman
Fred Sammons
Virginia Scardina
Maryell Scritchfield
Charlotte Selser
Margarette Shelton

Elizabeth T. Sheather
Angela Shehorn
Joan Elizabeth Simmons
Lucy Ashbrook Sloan
Amy Blatt Smith
Karen Costello Smith
Theresa Smith
Jo Solet
Amy Hahn Solomon
Dawn Albarado Sonnier
Tilda Wright Sorensen
Carole A. Sorcelli
Elinor Anne Spencer
Terri Sperber
Susan L. Spitzer
Elizabeth Patricia Stanton
Sarah B. Stauffer
Russ Stevenson
Robin Livingston Stone
Stone Ronald Stone
Patricia Melony Strong
Lorna Laakso Sulin
Catherine N. Sullivan
Kerri Sullivan
Sridevi Suramudi
Joan Surfus
Lucy Cushing Swan
Ann J. Sweeney
Peter Michael Talty
Marbea Tiernan Tammaro
Tiffany Shuk Fan Tang
Cynthia Mae Taylor
Laure Teitell
Dianne M. Tennant-Rucker
Tamra Linda Trenary
M. Bryan Terry
Courtney Britt Tesch
Vernetta E. Theuner
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Jacquelyn M. Thompson
Sharon F. Thompson
Angela Thompson
Linda Tickle-Degnen
Joan Marie Toglia
Esther Ann Toney

Elizabeth Mary Torcivia
Wenceslas Torres
Patricia Ann Totten
Marian Kristi Townsend
Gail Trefethen-Kelly
Carolyn J. Tuk
Robin Underwood
Christine Kay Urish
Cheryl Vennerstrom
Deepali Dhananjay Vidwans
Arlene Carrasco Villarin
Elena Vizary
Susan Marlene Vollman-King
Judith Lynn Von Buchler
Mary Workman Voytek
Carroll E. Walls, Jr.
Barbara Warner
Gregory Martin Welch
Joseph Kennedy Wells
Shirley Lewis Wheatley
Alice Rae White
Laura Blanscum Wicks
Suzanne Elizabeth Wilkinson
Dolores Williams
Linda A. Williams-Brown
Frances Helen Wilson
Mary-Margaret B. Windsor
Nan Wright Winn
Cecilia Wirth
Jennifer Dee Wolff
Brenda Yoshino
Susan Beth Young
Joseph L. Younger
Mary Jane Youngstrom
Suzanne Marie Zaleski
Marlene Zerbe
Shirley Zerbe

Lucy Lorraine Zurchauer
2011 Financial Highlights

Revenues and expenses incurred in supporting our profession through scholarships, research support and publications, development and recognition of leadership, education and maintaining the largest collection of occupational therapy resources in the country. The AOTF is a 501 (C |3) organization, Federal Tax I.D. # 136189382.

In FY 2011, the Foundation incurred expenses in the following programmatic categories:

**Program Expenses**

<table>
<thead>
<tr>
<th>Category</th>
<th>FY 2011</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Leadership &amp; Education</td>
<td>$100,190</td>
<td>8.8%</td>
</tr>
<tr>
<td>Research</td>
<td>$217,001</td>
<td>19.0%</td>
</tr>
<tr>
<td>Scholarships</td>
<td>$128,251</td>
<td>11.2%</td>
</tr>
<tr>
<td>Total Program Expenses</td>
<td>$445,442</td>
<td>39%</td>
</tr>
</tbody>
</table>

**Support Services**

<table>
<thead>
<tr>
<th>Category</th>
<th>FY 2011</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>General and administration</td>
<td>$535,835</td>
<td>46.9%</td>
</tr>
<tr>
<td>Marketing and development</td>
<td>$161,393</td>
<td>14.1%</td>
</tr>
<tr>
<td>Total Support Services</td>
<td>$697,228</td>
<td>61%</td>
</tr>
<tr>
<td>Total Expenses</td>
<td>$1,142,670</td>
<td>100%</td>
</tr>
</tbody>
</table>

**AOTF BALANCE SHEET**

<table>
<thead>
<tr>
<th>Category</th>
<th>FY 2011</th>
<th>FY 2010</th>
</tr>
</thead>
<tbody>
<tr>
<td>Cash and Cash Equivalents</td>
<td>$103,151</td>
<td>$2,270,973</td>
</tr>
<tr>
<td>Inventory</td>
<td>2,443</td>
<td>2,443</td>
</tr>
<tr>
<td>Prepaid expenses and other assets</td>
<td>703</td>
<td>953</td>
</tr>
<tr>
<td>Interest receivable</td>
<td>39,170</td>
<td>26,811</td>
</tr>
<tr>
<td>Bequest receivable</td>
<td>-</td>
<td>4,240,151</td>
</tr>
<tr>
<td>Contributions receivable net investments</td>
<td>48,038</td>
<td>50,529</td>
</tr>
<tr>
<td>Dues from AOTA</td>
<td>5,290</td>
<td></td>
</tr>
<tr>
<td>Investments</td>
<td>18,157,715</td>
<td>10,243,877</td>
</tr>
<tr>
<td>Beneficial interest in remainder and perpetual trusts</td>
<td>1,886,540</td>
<td>1,899,292</td>
</tr>
<tr>
<td>Cash surrender value of life insurance net</td>
<td>1,455</td>
<td>3,655</td>
</tr>
<tr>
<td>Property and equipment, net</td>
<td>29,389</td>
<td>30,718</td>
</tr>
<tr>
<td><strong>Total assets</strong></td>
<td>$20,273,894</td>
<td>$18,769,402</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Category</th>
<th>FY 2011</th>
<th>FY 2010</th>
</tr>
</thead>
<tbody>
<tr>
<td>Accounts payable and accrued expenses</td>
<td>$85,101</td>
<td>$119,378</td>
</tr>
<tr>
<td>Due to affiliate</td>
<td>-</td>
<td>30,714</td>
</tr>
<tr>
<td>Liability for future interest on pooled income fund</td>
<td>1,753</td>
<td>14,103</td>
</tr>
<tr>
<td>Deferred compensation obligation</td>
<td>43,060</td>
<td>84,993</td>
</tr>
<tr>
<td>Deferred revenue</td>
<td>7,695</td>
<td></td>
</tr>
<tr>
<td><strong>Total liabilities</strong></td>
<td>$137,609</td>
<td>$249,188</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Category</th>
<th>FY 2011</th>
<th>FY 2010</th>
</tr>
</thead>
<tbody>
<tr>
<td>Unrestricted</td>
<td>$13,642,265</td>
<td>$11,977,382</td>
</tr>
<tr>
<td>Temporarily restricted</td>
<td>720,925</td>
<td>885,562</td>
</tr>
<tr>
<td>Permanently restricted</td>
<td>5,773,095</td>
<td>5,657,270</td>
</tr>
<tr>
<td><strong>Total net assets</strong></td>
<td>$20,136,285</td>
<td>$18,520,214</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Category</th>
<th>FY 2011</th>
<th>FY 2010</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total liabilities and net assets</td>
<td>$20,273,894</td>
<td>$18,769,402</td>
</tr>
</tbody>
</table>

Copies of the complete audit report prepared by Rogers & Company, PLLC may be obtained by writing to AOTF at 4720 Montgomery Lane, PO Box 31220, Bethesda, MD 20824-1220

**Otsearch**

This year, OT SEARCH, the bibliographic database for the Wilma L. West Library added nearly 1,100 records including new monographs and journal articles. This brings the collection to over 3,200 monographs. The library indexes new material published in nearly 40 journals each year. In addition, the first three volumes of the Archives of Occupational Therapy were digitized. The historic volumes hold 165 articles, meeting minutes and editorials, giving readers a rare glimpse of the origin of the field of occupational therapy and the founding of the American Occupational Therapy Association. Originally published by Williams & Wilkins Co., Archives of Occupational Therapy transitioned into Occupational Therapy in Rehabilitation (1922-1952) and finally into the American Journal of Occupational Therapy (AJOT). These articles are now available in full-text downloadable format in OT SEARCH.

In 2011, OTJR, Occupation, Participation and Health expanded to publishing 24 articles each year and in addition published a supplement titled: Cognition and Executive Function, with guest editors M. Carolyn Baum, PhD, OTR, FAOTA and Noomi Katz, PhD, OTR. As editor, Jane Case-Smith, EdD, OTR/L, FAOTA helped the journal transition to an online submission and review process.

Eleanor Clark Slagle
Wilma L. West Library Continues to Grow