



THE AMERICAN
OCCUPATIONAL THERAPY
FOUNDATION

Contents

Message from the President	1
Collaboration	2
Innovation	3
Scholarship Recipients	3
Leveraging Resources and Securing the Future	5
Financials	7

connection

THE AMERICAN OCCUPATIONAL THERAPY FOUNDATION ■ Vol. 12, No. 1 Special Edition

annual report 2004

Celebrating the Past — Shaping the Future



April 2005 marks the 40th Anniversary of the American Occupational Therapy Foundation. In celebrating our accomplishments

over four decades, we honor and thank our colleagues, both past and present, whose investments of intellectual and financial capital contributed immeasurably to the Foundation's growth and success.

AOTF has remained resolute in its mission to build the capacity of the profession to engage in scholarly research and apply the scientific findings to promote education and practice of the highest quality. In pursuing these ends, AOTF has maintained a strategic balance between investing in programs that address current priorities and exploring innovations that hold promise for the profession and its contributions to society in the future.

AOTF is proud of its accomplishments. Since 1965, AOTF has funded over \$4 million in research grants; published a premier research journal,

OTJR: Occupation, Participation and Health, now in its 25th year; and created the Wilma L. West Library, the profession's most extensive resource. Working together, AOTF and AOTA have funded three university-based Centers for Scholarship and Research and The Center for Outcomes Research and Education (CORE). AOTF has funded doctoral and post-doctoral fellowships and pilot studies that have supported the early scholarship of many of the profession's most prestigious scholars. And today, AOTF collaborates with 28 state occupational therapy associations to offer over 70 scholarships and gradu-

ate awards each year to educate the next generation of occupational therapy professionals.

Collaboration, innovation, and leveraging resources are hallmarks of the Foundation's investments and stewardship on behalf of the profession. In addition to our ongoing programs, we are pleased to provide highlights of our most notable accomplishments in 2004 that are aimed at strengthening the profession today and tomorrow.

With great appreciation,

Ruth Ann Watkins, *President*

AOTF's Vision for the Profession

AOTF promotes a just and equitable society in which individuals, regardless of age or ability, may participate in occupations of their choice that give meaning to their lives and foster health and well-being. Through its dedication to scientific inquiry, education and leadership development, the Foundation pays tribute to the significance of everyday activities in enabling those who face personal challenges to realize their full potential.

Chartered in 1965 as an independent 501(c)(3) non-profit organization, the American Occupational Therapy Foundation actively solicits tax-deductible contributions to advance occupational therapy education and research.

AOTF connection

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COLLABORATION...

Occupational Therapy Organizational Partners (OTOP)

AOTF joined AOTA and the National Board for Certification in Occupational Therapy (NBCOT) in creating the Occupational Therapy Organizational Partners to facilitate interagency communication and identify opportunities for collaboration on issues of common concern. This relationship is characterized by a shared vision for the profession and is founded on authenticity, integrity, transparency of purpose and outcome, open dialogue and constructive critique.

We each see future projects as opportunities for both individual and collective growth and look forward to an increased working relationship.

Official Paper on Occupation in Societal Crises

The AOTF Task Force on Occupation in Societal Crises and the AOTA Commission on Practice collaborated on an official paper to document the contributions occupational therapy can make at times of need in communities and workplaces. Civilian and military personnel authored this paper as the first step toward developing a

network of occupational therapy professionals who may become certified by community and service agencies as first responders in times of crises.

International Conference on Evidence-based Occupational Therapy

In July 2004, thirty scholars from around the world met in Potomac, Maryland to explore evidence-based occupational therapy. This conference was the culmination of a grant AOTF secured with AOTA from the Agency for Healthcare Research and Quality. Topics discussed fell into three major areas: criteria for selecting and analyzing the literature; organization and dissemination of evidence; and educational processes appropriate for preparing therapists to use the evidence-based practice literature effectively and more broadly.

The outcomes of the conference, now displayed on the AOTF and AOTA Web sites, consist of a list of priority tasks to be achieved over the next five years. Chief among them are the development of a Web portal; increased support for OTseeker, a database developed by the Australian Association of Occupational Therapists; and the collection of educational materials to be made available

AOTF Strategic Plan 2004 - 2007

The Foundation is committed to five strategic areas that are fundamental to its vision of a just and equitable society in which people, regardless of their age or ability, enjoy the right to participate in occupations they choose that promote their health and well-being.

- **Education** as the key to excellent practice and flexible service delivery.
- **Research** that explores the relationship between occupation, participation and health.
- **Leadership** that contributes to civic engagement and quality of life for individuals and the communities in which they live.
- **Recognition** of occupational therapy as an agent for societal change in assuring a just and equitable society.
- **Fundraising** to create opportunities for occupational therapy today and tomorrow.

to therapists around the world through the AOTF Web site.

Enhancement of OT SEARCH

The Wilma L. West Library benefited from collaboration by AOTF and AOTA in converting OT SEARCH to a new information system, the SIRSI Unicorn® system. OT SEARCH now has unlimited, simultaneous access and the ability to link searchers to additional Web-based resources. The conversion of the 30,000+ records to conform to the new format and integration into the AOTA Web-based services took over a year.

INNOVATION...

Institute on Academic Scholarship and Developing An Academic Career

AOTF and AOTA collaborated in a year-long process to design a pre-conference institute for the 2005 AOTA Annual Conference. This institute targets faculty and beginning scholars in occupational therapy. In so doing, it directly supports the AOTF Board's priority to increase the number of doctorally prepared faculty available for educational programs in occupational therapy. The dual goals of the institute are to increase both the number of scholars in the field and the knowledge that is created through their scholarship.

AOTF Photography Contest "Images of Participation and Health"

The AOTF Photography Contest, "Images of Participation and Health," supported by a grant from the Eastman Kodak Company, is the centerpiece of the Foundation's 40th Anniversary. We received over 350 entries from occupational therapy colleagues in three categories: How We Work, How We Live, and How We Play. The fifteen winning photographs speak to the power of partici-

pation in meaningful activities as a bridge to health and well-being. These pictures are "worth a thousand words" in raising public awareness about how people live with a disability and their daily challenges to independence.

SCHOLARSHIPS AWARDED BY AOTF IN 2004

POST PROFESSIONAL DOCTORATE DEGREE IN OCCUPATIONAL THERAPY

Mary Fiorentino Scholarship - \$2,000

- Hope Martin
Texas Woman's University

Kappa Delta Phi Scholarship - \$2,000

- Cynthia Bell
Nova Southeastern University

PROFESSIONAL MASTER'S DEGREE IN OCCUPATIONAL THERAPY

North Coast Medical Scholarship - \$5,000

- Martin Taylor
Towson University

Kappa Delta Phi Scholarship - \$2,000

- Claudia Dunn
University of Southern California

Carolyn Kohn Memorial - \$2,000

- Beatrice Ambrosio
Mercy College

Oppenheimer Scholarship - \$2,000

- Kristine Whitfield
Kean University

Assembly of Student Delegates Scholarship - \$450

- Linda Bryan
University of Scranton

BACCALAUREATE DEGREE IN OCCUPATIONAL THERAPY

North Coast Medical Scholarship - \$5,000

- Persis Appiagyei
Howard University

Kappa Delta Phi Scholarship - \$500

- Cheryl Davidson
Medical College of Georgia

ASSOCIATE DEGREE IN OCCUPATIONAL THERAPY

Carlotta Wells Scholarship - \$500

- Tomaslav Pendzic
Quinsigamond Community College

2004 AOTF / STATE ASSOCIATION SCHOLARSHIPS

Arizona Occupational Therapy Association - \$1,000

Professional Master's Degree in Occupational Therapy

- Sharon Oldfield
AT Still University

The Florence Wood Scholarship of the Arkansas Occupational Therapy Association - \$500

Professional Master's Degree in Occupational Therapy

- Elizabeth McCullars
University of Central Arkansas

Kansas Occupational Therapy Association - \$500 each

Professional Master's Degree in Occupational Therapy

- Jill Furasek
Rockhurst University

Baccalaureate Degree in Occupational Therapy

- Sarah Johnston
Newman University

Louisiana Occupational Therapy Association - \$500

- Elaine Guthrie
Louisiana State University Health Sciences Center

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

Professional Master's Degree in Occupational Therapy

- Mary Bernardo
Bay Path College

Michigan Occupational Therapy Association - \$500

Baccalaureate Degree in Occupational Therapy

- Mary Neph
Eastern Michigan University

The Mary Eileen Dixey Scholarship of the New Hampshire Occupational Therapy Association - \$2,000

Professional Master's Degree in Occupational Therapy

- Elicia Brown
University of New Hampshire

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

Professional Master's Degree in Occupational Therapy

- Angela Lindeman
University of New Mexico

New York Occupational Therapy Association - \$1,000 each

Professional Master's Degree in Occupational Therapy

- Cheryl Cowart
Mercy College
- Delynne Baptiste
York College of the City of New York

Baccalaureate Degree in Occupational Therapy

- Deborah Brown
Utica College

North Carolina Occupational Therapy Association - \$300 each

Professional Master's Degree in Occupational Therapy

- Tani Savage
Winston Salem State University

- Sheronda Slade
Cabarrus College of Health Sciences

Ohio Occupational Therapy Association - \$1,000

Professional Master's Degree in Occupational Therapy

- Andrea Sheibley
Medical College of Ohio

Oregon Occupational Therapy Association - \$600

Professional Degree in Occupational Therapy

- Jean Oxley
Pacific University

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

Baccalaureate Degree in Occupational Therapy

- Irina Collins
University of Pittsburgh

Rhode Island Occupational Therapy Association - \$1,000

Associate Degree in Occupational Therapy

- Sue Hunt
Community College of Rhode Island

South Carolina - Chris Ebbers Scholarship - \$500

Professional Master's Degree in Occupational Therapy

- Amanda Royal
Medical College of South Carolina

Texas Occupational Therapy Association - \$1,000

Professional Master's Degree in Occupational Therapy

- Amanda Gonzales
University of Texas Health Sciences Center at San Antonio

Utah Occupational Therapy Association - \$350

Professional Master's Degree in Occupational Therapy

- Brian Gibby
University of Utah

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

Professional Master's Degree in Occupational Therapy

- Katie Sue Taylor
West Virginia University

Wisconsin Occupational Therapy Association - \$1,000

Professional Master's Degree in Occupational Therapy

- Helen Eng
University of Wisconsin at Milwaukee

The Changing Face of AOTF



AOTF

AOTF

Leveraging Resources and Securing the Future

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

The strengths, talents, knowledge, and experience of volunteers and the AOTF staff allow us to gain the maximum benefit from every dollar. The *AOTF Annual Report 2004* highlights the year's accomplishments and provides a public record of our assets and expenditures to promote occupational therapy research and education.

The leadership and commitment of our colleagues created many of the accomplishments AOTF celebrates during its 40th Anniversary and positions the Foundation to shape a promising future for occupational therapy.

The Board of Directors and staff thank those who generously supported AOTF during the 2004 fiscal year, including the 35,000 members of AOTA who contributed to the Foundation through their annual membership dues. Tax-deductible donations and in-kind gifts enable AOTF to advance practice, support education and disseminate information about the relationship between occupation and health.

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Sponsor \$10,000 and above

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Partner \$1,000 to \$10,000

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West Virginia Occupational Therapy Association
Wisconsin Occupational Therapy Association

Up to \$999

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Canadian Association of Occupational Therapists
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\$25,000 and above

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Denise Kathleen
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Kathleen Ann
Gross
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Marion Meloni
Guidd
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Stewardship and Accountability Fiscal Year 2004

AOTF closed the fiscal year on September 30, 2004.

Net assets at the close of FY 2003-2004 were \$9,947,508 as compared with \$9,853,273 at the close of 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 \$990,499 including \$103,842 from AOTA 2% transfers representing AOTA members' contributions. Programmatic and operating expenses were \$909,457. Total losses on marketable securities were \$160,219 resulting in an increase in net assets for FY 2003-2004 of \$94,235.

In FY 2003-2004, the Foundation incurred expenses in the following programmatic categories.

Program Expenses

Research	\$ 90,376
Education	292,727
Scholarships	35,375
	<hr/>
	418,478

Support Services

Administration and General	310,522
Marketing and Development	180,457
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	490,979

TOTAL	\$ 909,457
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Tara Coughlin Joyce
Lynne Marie Kaiser
John Timothy Kanagy
Sylvia Harlock
Kauffman
Karen Sue Kayton
Alice Ellen Kennedy
Astrid Kinebanian
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Lawrence F. Zachow, Jr.
Kate Zannoni
Alison Hazel Zilioli

It is our intention to recognize all fiscal year 2004 donors of \$25 and over in this listing. If we have inadvertently omitted your name or placed you in an incorrect giving category, please call AOTF at 301-652-6611, Ext. 2552.

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

ASSETS

	2004	2003
CURRENT ASSETS		
Cash and cash equivalents	\$ 267,507	\$ 282,982
Contributions receivable	49,578	246,299
Pamphlets and pins	927	2,725
Other receivables and prepaid expenses	50,609	29,643
	368,621	561,649
MARKETABLE SECURITIES		
Corporate bonds	317,331	396,374
Common stocks	1,240,987	1,023,974
	1,558,318	1,420,348
SPLIT-INTEREST GIFTS		
Pooled income fund	101,301	101,717
Charitable remainder unitrust	872,239	760,788
Charitable remainder trusts	6,996,252	6,975,515
	7,969,792	7,838,020
FIXED ASSETS		
"Net of accumulated depreciation of \$75,558 and \$69,626"	3,918	9,633
OTHER ASSETS		
Contributions receivable	39,961	1,500
Cash surrender value of life insurance ("net of related policy loans of \$239,106 and \$219,640")	6,898	22,123
	46,859	23,623
TOTAL ASSETS	\$ 9,947,508	9,853,273

LIABILITIES AND NET ASSETS

LIABILITIES		
Accounts payable and accrued expenses	44,622	26,799
Due to affiliate	29,601	1,972
Liability under unitrust agreement	257,146	275,263
Liability for future interest in pooled income fund	22,598	28,795
Deferred compensation	127,144	122,250
Other	178,163	191,000
	659,274	646,079
NET ASSETS		
Unrestricted	(325,389)	(206,101)
Temporarily restricted	1,319,985	1,140,879
Permanently restricted	8,293,638	8,272,901
	9,288,234	9,207,192
TOTAL LIABILITIES AND NET ASSETS	\$ 9,947,508	\$ 9,853,273

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.