

# **BUILDING EVIDENCE TO IMPROVE PRACTICE & HEALTH**

Annual Report 2015



# BUILDING EVIDENCE TO IM



***This past year saw a change in staff leadership of the Foundation. After seven years of leading the Foundation as Executive Director and subsequently CEO, Dr. Charles Christiansen retired. Following a national search process, Dr. Scott Campbell was hired to succeed Dr. Christiansen. The Board and I would like to thank Chuck for his years of service and tireless efforts on behalf of the Foundation. We'd also like to welcome our new CEO and look forward to working with Scott as we build a new future for the Foundation.***

## ***Dear Friends and Colleagues,***

As we begin the next 50 years of this extraordinary organization, it is my privilege to serve as Chair of the Foundation Board.

This is a very exciting and important time for occupational therapy research. The health care community has begun to recognize the value of engagement in meaningful life activities for health and quality of life. This recognition opens new possibilities for collaboration both within and outside traditional rehabilitation fields, including the behavioral, educational, and social sciences. We have well-trained scientists who are already doing significant work in relevant areas, and a growing number of PhD graduates with excellent research training who are committed to carrying this work forward. However this is only a beginning: we need to build on this foundation and grow our efforts as much work remains to be done.

In addition to building knowledge, there is a significant need to build research capacity in occupational therapy. As a relatively new science, we do not have the well-tested mechanisms of more established disciplines to prepare the needed number of career scientists or to adequately support the continuing productivity of established researchers. In the coming year we will continue our discussion of how the Foundation may best contribute to meeting this need and seeking resources and support for these efforts. By building research knowledge and capacity, we play an essential role in building the evidence needed to improve practice and ultimately improve the health of those we serve.

To this end, we are introducing our new tag line: **Building Evidence to Improve Practice & Health.**

We feel it speaks directly to the Foundation's mission and our unique role in translating knowledge and contributing to the development of new methods for practice.

We are pleased to share this report of the Foundation's activities over the past year. Please join me and other researchers and practitioners who are committed to ensuring that occupational therapy is poised to meet the challenges of the future. We hope this annual report inspires you, as a valued investor, to continue to give generously and partner with us to realize our vision.

Sincerely,

A handwritten signature in black ink that reads "Wendy J. Coster".

Wendy J. Coster, PhD, OTR/L, FAOTA  
Chair, Board of Trustees  
Member, Academy of Research

# PROVE PRACTICE & HEALTH

## AOTF Sets Research Priorities

As AOTF builds upon its past programs to support an evidence-based profession, we are looking towards the future and where our focus should lie.

To this end, AOTF Director of Research Dr. Julie Bass conducted a year-long comprehensive review of the strategic plan of federal agencies and major foundations with the assistance of the AOTF Scientific Advisory Council and AOTF key stakeholder groups. In the end, the following research priorities were created:

- Health behaviors to prevent and manage chronic conditions
- Functional cognition
- Safety and injury prevention in home, clinical and community settings
- Technology and environmental supports in home and community
- Development and transitions for individuals and families
- Emotional and physiological influences
- Family and caregiver needs
- Health care experience: access, care coordination, utilization.

Occupational therapy's unique contribution to science is to understand the mechanisms that support occupational performance and participation. The protective and preventive role of occupations comes to the forefront as society seeks to improve health and the everyday lives of individuals, families, and communities. The Foundation will direct its resources to prepare scientists and fund work that will make occupational therapy's contribution to occupational performance and participation science explicit.

These research priorities will serve as a road map for our fundraising efforts and will lead to an expansion of the evidence-base that will inform the practice of occupational therapy.



M. Carolyn Baum, PhD, OTR/L, FAOTA  
Chair, AOTF Scientific Advisory Council  
Member, Board of Trustees  
Member, Academy of Research



*For 50 years, AOTF has been committed to advancing the science of occupational therapy. I recognize that evidence-based practice only comes from sound research—that's why I have committed to a monthly gift of \$100 to support the research efforts of the AOTF. So many talented scientists are prepared to answer questions to guide our practice. I ask you to join me by committing to a monthly gift today.*

# Intervention Research Grants Build the Foundation for OT Research

This year marked the second cycle of the AOTF Intervention Research Grant (IRG) Program. These grants are supporting researchers in developing interventions that are client-centered, occupation-based and theory-driven and in completing the necessary groundwork for larger studies and future funding. Additional objectives of the IRG program include: aligning research with future funding priorities, cultivating interdisciplinary research teams and partnerships with communities, including underserved and diverse populations in research, and mentoring new investigators and researchers. The IRG program receives major funding from the National Board for Certification in Occupational Therapy (NBCOT), the American Occupational Therapy Association (AOTA), and the St. Catherine Challenge.

The seven FY 2015 awards addressed the priority populations of developmental disabilities, chronic health conditions, and preventable secondary conditions as identified in the AOTF/AOTA Occupational Therapy Research Agenda. The innovative interventions under development through these awards are building evidence for occupational therapy and will support people's full participation in meaningful life activities.

The AOTF Scientific Advisory Council provides recommendations on the priorities and objectives for the IRG Program each year. The 2015-2016 request for applications (RFA) of the IRG program was modified to give priority consideration to early stage, emerging, or early midcareer investigators as there is an urgent need to support these investigators on their journeys to securing substantial extramural funding for their work.

Applicants were required to obtain commitment from an experienced research mentor who will actively guide them in their project.

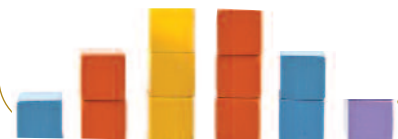
A peer-review process is used to identify the strongest proposals that are aligned with the AOTF/AOTA Occupational Therapy Research Agenda and the research priorities of federal funding agencies and major foundations. A Scientific Review Group (SRG) of experienced grant reviewers and a statistician reviews and discusses the grant applications and ranks them on standard National Institutes of Health (NIH) grant criteria: overall impact, significance, innovation, approach, investigator, and environment. AOTF funded five awards in FY 2014 and seven awards in FY 2015 with a maximum award of \$50,000. These grants are growing the profession's capacity for conducting larger studies and building evidence for the occupational therapy interventions that support participation in everyday life.

*The AOTF allowed me, as an early investigator, to really think broadly, to collaborate with people that I wouldn't be able to work with and to work with clients that I wouldn't be able to do without this funding. We're in the business of helping people, but we also need to be in the business of helping our profession. And figuring out how to keep moving the science forward.*

Simone Gill, PhD, OTR/L  
Boston University

Director, Motor  
Development Laboratory

AOTF Intervention  
Research Grant Recipient



## FY 2015 AWARDEES

### Winnie Dunn, PhD, OTR/L, FAOTA

*Feasibility of Telehealth Coaching for Rural Families of Children with Autism, University of Kansas Medical Center*

### Simone Gill, PhD, OTR/L

*Use of Motor Learning Principles to Reduce Fall Risks After Surgical Weight Loss, Boston University*

### Jessica Kramer, PhD, OTR/L

*An Environment Problem Solving Strategy for Parents of Youth with Disabilities, Boston University*

### Elizabeth Larson, PhD, OTR

*5Minutes4Myself: Motivational Occupational Coaching & Mindfulness*

*for Caregivers, University of Wisconsin – Madison*

### Susan Magasi, PhD

*Negotiating the Healthcare System: A Peer-OT Lead Intervention, University of Illinois at Chicago*

### Stacey Reynolds, PhD, OTR/L

*Effects of Deep Pressure on Arousal and Performance in Persons with Autism, Virginia Commonwealth University*

### Roseann Schaaf, PhD, OTR/L, FAOTA

*Testing Outcomes of a Manualized OT Intervention for Children with Autism, Thomas Jefferson University*

# AOTF Academy of Research 2015 Inductees

The AOTF Academy of Research recognizes individuals who have made exemplary and distinguished contributions toward the science of occupational therapy. Read about all the Academy members and their research on the AOTF website, [www.aotf.org](http://www.aotf.org).

## JANE DOUGLAS CASE-SMITH, EDD, OTR/L, FAOTA

### The Ohio State University

Dr. Case-Smith was posthumously admitted into the Academy for her research investigating the effectiveness of occupational therapy and neurorehabilitation therapies for children with cerebral palsy. Her secondary research interest was the translation of evidence-based practice to occupational therapy services for children with developmental disabilities.



performance especially among those populations suffering from CNS deficits, and the implications for subsequent rehabilitation. One of her focal research activities is utilizing virtual reality (VR) technology for intervention with post-traumatic stress (PTSD) patients.

## MARY JANE MULCAHEY, PHD, OTR/L

### Thomas Jefferson University

Dr. Mulcahey's research focuses on developing and establishing robust, clinically relevant and psychometrically sound measurement tools including parent and child-reported outcome measures using computer adaptive testing and translating these to inform occupational therapy practice. She is a widely recognized scholar who collaborates with inter-disciplinary researchers and clinicians to foster participation in individuals with disabilities.



## NAOMI JOSMAN, PHD, OT(I)

### University of Haifa

Dr. Josman's research focuses on cognition, metacognition, and executive functions and their impact on everyday life. A major goal of her research is to explore basic and applied levels of functioning to contribute a better understanding of the links between brain, behavior, and



*I have been a member of AOTF's Academy of Research for many years, and have seen the strong and sustaining impact that AOTF funding has had on my career, the growth of those I have mentored, and most importantly, on setting a course that continues to establish high standards for evidence-based practices for occupational therapy. For example, AOTF funded the earliest project that led to the development of the Sensory Profiles, standardized assessments that are now used worldwide to support evidence-based practices. Additionally, the Sensory Profiles are now used in hundreds of research grants every year, and would not even exist without AOTF's early insight to invest in this tool's development.*

*We are currently working on an AOTF-funded telehealth coaching intervention that is proving to be highly effective; interdisciplinary colleagues are inviting us to join their research program because of this project, extending occupational therapy's influence with other disciplines as well. These are but a few reasons I support AOTF with my own contributions each year, and I hope others will follow my lead. Know that your practices today have been influenced by an investment that AOTF made to substantiate our work; investing in authenticated practices for those we serve – a worthy investment indeed, is in fact PRICELESS.*

Winnie Dunn, PhD, OTR, FAOTA  
University of Kansas Medical Center  
Member, Academy of Research  
Intervention Research Grant Recipient



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## AOTF Events at the 2015 AOTA Annual Conference Focused on the Profession

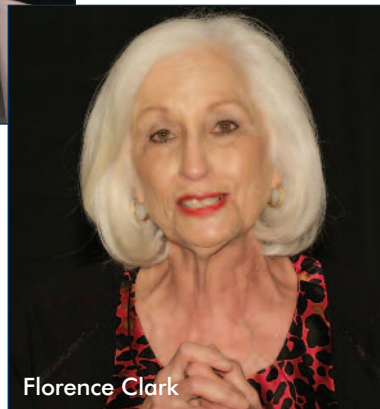
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Friday morning, April 17 began at the Breakfast with a Scholar with Carolyn Baum, PhD, OTR/L, FAOTA, and Florence Clark, PhD, OTR/L, FAOTA, discussing the past and future of occupational therapy. Glen Gillen, EdD, OTR, FAOTA, of Columbia University moderated the discussion.

Drs. Baum and Clark discussed the profession's quest to become science-driven and evidence-based, noting the extraordinary evolution of research brought about by established scientists, leading academic programs, and a growing number of talented emerging young investigators. The emphasis on the importance of research within the Centennial Vision and the impact of intervention grant support were cited as key factors in the evolution of the profession; along with the importance of collaboration and mentoring in maximizing the relatively small number of qualified scientists in the discipline. They agreed that the expanding number of academic programs is challenging the supply of qualified faculty and that succession planning in established research centers is necessary to avoid losing



Carolyn Baum



Florence Clark

momentum in advancing theory and research and noted that serious efforts are needed to assure that the field's demographics better reflect the changing population.

Friday afternoon saw a new event: the State of the Science (SoS) Symposium. Each year the SoS will summarize scientifically-validated evidence and identify gaps in the evidence and research priorities to support best practice.

In its inaugural meeting, the SoS looked at sensory factors and asked: What is our current knowledge on sensory factors and their impact on daily life across the lifespan?

To answer this question, internationally renowned scientists, Leeanne Carey, BAPPSC (OT), PhD, and Winnie Dunn, PhD, OTR, FAOTA, presented scoping reviews of the peer-reviewed literature. Grace Baranek, PhD, OTR/L, FAOTA, and Scott Frey, PhD, responded and moderated discussion of best practice for occupational therapy given the current state of the science.

Subscribers to *OTJR: Occupation, Participation and Health* will be able to access these papers online spring 2016.

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## AOTF Recognized Occupational Therapy Leaders With a New Society

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AOTF established the Leaders & Legacies Society (L&L Society) in 2015 to identify, honor, and fully engage a cadre of occupational therapy professionals who have demonstrated their leadership abilities and skills through sustained service to occupational therapy and wish to continue advancing the profession.

Eighty members celebrated their induction into the L&L Society at the AOTA Conference in Nashville on April 17, 2015 in a special ceremony. By year's end, the Society welcomed 156 members who could then pick which volunteer circle to focus their efforts: Society Recruitment and Governance, History, OTA Recognition, Public Awareness, and Scholarships. The new Society members had a busy year. Chair Ellen L. Kolodner, MSS, OTR/L, FAOTA, and members Susan Haiman,

MPS, OTR/L, FAOTA, Moya Kinnealy, PhD, OTR/L, FAOTA, and Catherine Verrier Piersol, PhD, OTR/L, FAOTA, shared their personal and professional journeys related to building OT literature and research efforts at the NBCOT/ AOTA Student Conclave in November. The Society's History Circle co-chair, Ruth Schemm, EdD, OTR/L, FAOTA, worked with three Temple University graduate students documenting OT history with historical reviews of OT social advocacy from 1930-1950. Society members collaborated with Pi Theta Epsilon in the fall and other members established regional Society organizational presence.

The Society's promotion of AOTF's mission through giving, mentoring, and volunteering serves to sustain and enrich the profession.

## Scholarships Grew in 2015

In 2015, the American Occupational Therapy Foundation awarded \$65,000 in scholarships to deserving students attending accredited occupational therapy programs in the United States. AOTF was pleased to begin a partnership with OccupationalTherapy.com. Thanks to their generosity, two \$5,000 scholarships were awarded to outstanding applicants pursuing post-baccalaureate degrees in occupational therapy. OccupationalTherapy.com joins North Coast Medical in offering our most generous scholarships. In addition, Kappa Delta Phi National Sorority offered scholarships for the 42nd year.

In celebration of his retirement and his passion for the occupational therapy profession, AOTF CEO Dr. Charles Christiansen and his wife, Dr. Beth Jones established the Charles Christiansen and Beth Jones Endowed Scholarship to support occupational therapy students from underrepresented populations in order to increase diversity of occupational therapy practitioners. In addition, Bonita Kraft, an OT practitioner, endowed a scholarship to support the growing need for qualified practitioners in mental health. AOTF's endowed scholarships are perpetual and support future generations of students and touch countless individuals who benefit from the therapy services they will provide.

## 2015 Scholarship Recipients

### Named Scholarships

#### North Coast Medical Scholarship – \$5,000 each

Samantha Itaya, California State University,  
Dominguez Hills

Roxie McFarland, Colorado State University

#### OccupationalTherapy.com Scholarship – \$5,000 each

Taylor Zonts, West Virginia University

Madison Meadows, Winston-Salem State  
University

#### The National Board for Certification in Occupational Therapy Endowed Scholarship – \$2,379 each

Amelia Brown (OTD), Belmont University

Megan Blake (OTD), University of Toledo

Denise LaRocca, Tufts University

Kate Lee, University of Southern California

#### Willard & Spackman Scholarship – \$2,000

Cassidy Kemp, University of Scranton

#### Kappa Delta Phi Scholarship – \$3,000

Rachel Boeche, University of Florida

Calista Crouthamel, St. Ambrose University

#### Mary Fiorentino Memorial Scholarship – \$1,500

Mary Lohberg, St. Ambrose University

#### Alice Jantzen Memorial Scholarship – \$1,000

Kate Hartnett, Salus University

#### The Bonita Kraft Endowed Scholarship – \$1,000

Heidi Chung, Rush University

#### Mary Minglin Memorial Scholarship – \$1,000

Gabrielle Mele-Algus, Tufts University

#### Edith Weingarten Memorial Scholarship – \$1,000

Katrina Kotta, University of North Dakota

#### The Linda Botten Endowed Scholarship – \$940

Sarah Jamieson, Thomas Jefferson University

#### The Martha Kirkland Pi Theta Epsilon Endowed Scholarship – \$900

Emma McClellan, Eastern Kentucky University

#### Carlotta Welles Scholarship – \$500

Angela Heinrich (OTA), Kirkwood Community  
College

#### The Network for Lesbian, Gay, Bisexual and Transgender Concerns in Occupational Therapy Endowed Scholarship

Allison Conlon Perry, Medical University of  
South Carolina

#### The AOTA Assembly of the Student Delegates (ASD) Scholarship

Kirsten Fertig (OTD), Pacific University

### AOTF – State Occupational Therapy Association Scholarships

#### The Arkansas Florence Wood Occupational Therapy Association Scholarship

Melodie Mauney, University of Central  
Arkansas

*continued on p.8*

***Our mission at OccupationalTherapy.com is to enhance the quality of life for the patients and clients in the care of the professionals we serve. One of the ways we do that is by supporting AOTF through the sponsorship of student scholarships. We are honored to partner with this great organization to help educate and prepare the next generation of OT professionals.***

Fawn Carson, MS, OTR/L, ATP  
Managing Editor  
OccupationalTherapy.com



**Florida Occupational Therapy Association Myra McDaniel Scholarship**

Stephanie Rickrode, University of Florida

**The Kansas Occupational Therapy Association Endowed Scholarship**

Lindsay Childers, University of Kansas Medical Center

Andrea Hullman, Rockhurst University

Angela Rausch, Rockhurst University

**The Massachusetts Occupational Therapy Association Karen Jacobs Scholarship**

Ariel Schwartz, Boston University

**The Fred Sammons and Barbara Rider Endowed Scholarship of the Michigan Occupational Therapy Association**

Emily Byl, Western Michigan University – Grand Rapids Campus

**The Ruth Peterson Memorial Endowed Scholarship Kappa Chapter, Pi Theta Epsilon, University of North Dakota**

Hana Mattern, University of North Dakota

**The Oklahoma Occupational Therapy Association Endowed Scholarship**

Bethany Duncan, Murray State College

**The Chris Ebbers Endowed Scholarship of the South Carolina Occupational Therapy Association**

Patee Tomsic, Medical University of South Carolina

**The Harlan and Rita Temple South Dakota Occupational Therapy Association Endowed Scholarship**

Brianna Jackson, University of South Dakota

Lora Smith, University of South Dakota

Rachel Roth, University of South Dakota

**The Texas Occupational Therapy Association Endowed Scholarship**

Jennie Nguyen, University of Texas at El Paso

Chris Wong, Texas Woman’s University

Esmeralda Lizcano, Texas Woman’s University

**The Utah Occupational Therapy Association Endowed Scholarship**

Wendi M. Rock, University of Utah

**The Fred Sammons Endowed Scholarship of the Virginia Occupational Therapy Association**

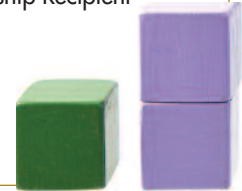
Richard Price, III, Virginia Commonwealth University

**The Washington Occupational Therapy Association Endowed Scholarship**

Maegan Catchpole, University of Washington

*I intend to continue my pursuit of giving people a voice through meaningful activity in the OT realm.*

Denise M. LaRocca  
Tufts University  
NBCOT Endowed  
Scholarship Recipient



**The West Virginia Occupational Therapy Association Charlotte Prudich, Elizabeth B. Devereaux, and Deborah Shamblin Endowed Scholarship**

Kayleigh Swanson, West Virginia University

Jennifer Walberg, West Virginia University

**The Wisconsin Occupational Therapy Association Endowed Scholarship**

Joseph Deanovich, University of Wisconsin - Madison

Amy J. Garinger, University of Wisconsin - LaCrosse

*This scholarship will allow me to continue to pursue my final semester of education while maintaining my commitment to service and learning in the community. ...I am grateful for this support and will carry on your amazing gift of generosity into my future work and service of those in the community who need it most.*

Joe Deanovich  
University of Wisconsin  
Wisconsin OT Association  
Endowed Scholarship Recipient



## 2015 Award Winners

**AOTF is proud of its award winners, each of whom exemplifies a commitment to occupational therapy research, leadership, and education. All award winners were recognized at the AOTA/AOTF awards ceremony at the AOTA Annual Conference in Nashville.**

**AOTF A. Jean Ayres Award**

Patricia Bowyer, EdD, MS, OTR, FAOTA  
Texas Woman’s University

**AOTF Virginia Scardina Award of Excellence**

Diana A. Henry, MS, OTR/L, FAOTA  
Henry Occupational Therapy Services, Inc.

**AOTF Meritorious Service Award**

Alfred “Chip” J. Chiplin, Jr., JD, MDiv, CPE  
Center for Medicare Advocacy, Inc.

**AOTF Leadership Service Commendation**

Sandra Rogers, PhD, OTR/L  
Pacific University  
Stephanie Singleton, OT/L  
Lovelace Rehabilitation Hospital

**AOTF Certificate of Appreciation**

Kathleen Matuska, PhD, OTR/L  
St. Catherine University

# Why Support AOTF?

## BUILDING EVIDENCE TO IMPROVE PRACTICE & HEALTH

*is more than our new tagline –*

**...it's our commitment to our unique role in the future of occupational therapy.**

We're so grateful to you, our committed donors, for your generosity. It's your selfless, ongoing support that has funded over \$2 million in direct grants, awarded scholarships to over 1,500 students, and supported programs such as the Leadership Mentoring Program, the Habits conferences, and our scientific journal, *OTJR: Occupation, Participation and Health*.

### WE NEED YOUR SUPPORT THIS YEAR & EVERY YEAR

Did you know that the average AOTF donor gives once every three years? Research doesn't take a year off. We need your support **every year** to ensure that our research priorities are fully funded.

**Building Evidence** requires a large **commitment** every year to continue to invest in research via the Intervention Research Grants and award all research priority areas not just a few.

**Improving Practice and Health** requires a large **investment** in translating the research we fund into practice guidelines that give practitioners the latest results to positively impact the health and well-being of the people we serve.

### WHAT IS YOUR COMMITMENT AND INVESTMENT?

**Commit** to becoming a monthly donor.

- A monthly gift is the lifeblood needed to fully fund the research priorities set forth by the AOTF Scientific Advisory Council. Simply call AOTF at 240-292-1050 and know you are contributing to the future of OT science and practice.

**Invest** in AOTF through your will and life insurance policy.

- Plan to leave a gift to AOTF and create a legacy. Work with your financial planner and insurance agent to donate a portion of your estate or life insurance policy to AOTF. If you've already included AOTF, please let us know and we will recognize your generosity.

And don't forget to make an annual **contribution**.

- Your direct gift to the AOTF is 100% tax deductible.

### THE AOTF MISSION

The mission of AOTF is to advance the science of occupational therapy to support people's full participation in meaningful life activities.

### THE AOTF VISION

We envision a vibrant science that builds knowledge to support effective, evidence-based occupational therapy.

# THANK YOU

**YOUR ANNUAL INVESTMENT IS THE ONLY WAY WE CAN CONTINUE TO BUILD EVIDENCE TO IMPROVE PRACTICE AND HEALTH.**

## Digital Access Grows at the Wilma L. West Library, OTJR



The Wilma L. West Library continues to develop its collection of occupational therapy and rehabilitation materials and to catalogue them in OT SEARCH, the online public access catalog. This valuable resource continues to grow and has nearly 44,000 items including journal articles from over 50 different publications. With the Centennial on the horizon, the archives have embarked on a project to digitize its video collection. For updates, follow the Wilma L. West Library on Twitter with @WLWLibrary.

OTJR: *Occupation, Participation and Health*, AOTF's peer-reviewed research journal, switched to Sage Publishing in 2015. Sage has digitized OTJR's entire archive from April 1981 to the present, making it available on [otj.sagepub.com](http://otj.sagepub.com). Special issues are in the works including a supplement on occupation and justice.

Sherrilene Classen, PhD, MPH, OT Reg. (Ont.), FAOTA from the University of Western Ontario began her term as editor-in-chief and selected as associate editors: Timothy Reistetter, OTR, PhD, FAOTA, University of Texas Medical Branch; Elizabeth Skidmore, PhD, OTR/L, FAOTA, University of Pittsburgh; Michelle Woodbury, PhD, OTR/L, Medical University of South Carolina; Isabell Gelinas, PhD, OT(c) erg, McGill University; Sue Coppola, MS, MOT/L, BCG, FAOTA, University of North Carolina at Chapel Hill; Anita Bundy, ScD, OT, FAOTA, University of Sydney; and Debbie Laliberte Rudman, PhD. Liliana Alvarez, PhD, University of Western Ontario, is assistant editor.

## For the Second Year, St. Catherine University Came Out on Top

The St. Catherine Challenge began at St. Catherine University in 2013 by students who understood the importance of *Building Evidence to Improve Practice & Health*. These students challenged schools across the nation to raise funds for Intervention Research Grants provided by AOTF.

During the 2014-2015 cycle, St. Catherine University, Boston University, College of St. Scholastica, Creighton University, Florida International University, Spalding University, Thomas Jefferson University, University of North Dakota, University of Puget Sound, University of Southern

California, University of Toledo, University of Wisconsin-LaCrosse, Virginia Commonwealth University, and Washington University in St. Louis built on the foundation established during the inaugural year of the Challenge to collectively raise over ten thousand dollars. St. Catherine University was recognized as the top fundraising school during AOTF's Breakfast with a Scholar event at the 2015 AOTA Conference. Many schools have accepted the Challenge once again, with 30 pledged to participate in 2016.



***My role as a mentee in the Habits III Conference exposed me to leaders in the field of OT and beyond and I learned to understand that as an OT scholar, I needed to make connections with my work outside of the field of OT, while simultaneously realizing the unique perspective OT scholars can contribute to other researchers' work. My early successes (Habits III mentee, Dissertation Research Grant recipient, Qualitative Research Exchange speaker) gave me the confidence and knowledge to apply for the Intervention Research Grant. The intervention research grant is allowing me to undertake essential foundational work to establish new interdisciplinary relationships with researchers in public health and conduct exploratory studies that will strengthen the design and rationale for our proposed intervention in future grant proposals.***

***I'm committed to being an annual donor to AOTF because AOTF has continued to demonstrate its commitment to high quality scholarship nationally and internationally. I have first-hand experience and know the "bang for the buck" – AOTF consistently implements processes that ensure these seed funds are supporting crucial, ground-breaking work that will set the stage to advance the scholarship of the profession.***

Jessica M. Kramer, PhD, OTR/L  
Assistant Professor, Department of Occupational Therapy, Boston University  
Intervention Research Grant Recipient



# Numbers Tell the Story at Pi Theta Epsilon

Pi Theta Epsilon (PTE), the national honor society for occupational therapy, supports occupational science and evidence-based occupational therapy practice by promoting research, leadership and scholarly activities by its members.

In 2015, PTE implemented avenues of communication and information exchanges between chapters and worked to establish increased benefits for alumni. These efforts were sup-



ported by leading the annual PTE Faculty Advisors Workshop at the AOTA Annual Conference, launching an informational webinar series, and hosting a session at the NBCOT/AOTA Student Conclave. During this session, professor and researcher at Temple University, Beth Pfeiffer, PhD, OTR/L, BCP, and Melissa Stutzbach MS, OTR, a project coordinator at the AOTA, presented on opportunities for generating and utilizing research effectively in professional practice.

## PI THETA EPSILON BY THE NUMBERS IN 2015:

115

● **PTE alumni, current members, and faculty advisors** interacted at the PTE Alumni Reception at the AOTA Annual Conference in Nashville. PTE's annual Faculty Advisor's Workshop also took place during the conference. Updates to the bylaws, opportunities for national student and chapter involvement, and future alumni benefits were shared.

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● **chapters** sent delegates to the 25th PTE Annual Business Meeting held in November 2015 at the AOTA/NBCOT Student Conclave. Chapters approved and updated bylaws, learned about increased PTE communications available via social media, and were encouraged to apply for the Mary J. Bridle Award and the Martha Kirkland Pi Theta Epsilon Endowed Scholarship.

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● **occupational therapy programs** formed a PTE chapter at their school in 2015: Delta Sigma at Husson University, Delta Rho at Indiana State University, Delta Pi at Adventist University of the Health Sciences, Delta Omicron at Rockhurst University, Delta Nu at Concordia University Wisconsin, and Delta Mu at Salus University.

5

● **PTE students shared their research** projects by participating in the 2nd Annual Poster Session at AOTA/NBCOT Student Conclave. A focus on research was present throughout the conference; all PTE members had the opportunity to attend the PTE-sponsored session "Becoming a Lifelong Evidence Builder: Reflections on the Road to Research".

2

● **new national board members**, President Joseph Brey and Secretary Rebecca Hastings, were welcomed at the PTE Annual Business Meeting. They join standing Vice President Kimberly McClung and Treasurer Myrtyce Courtright. PTE nominations and elections are held in the spring of each year with candidates beginning their term at the Annual Business Meeting.

1

● **chapter**, Alpha Pi at Touro University Nevada, received the PTE President's Award for its efforts in presenting current OT research to peers via their "Lunch and Learn" program. This award honors a Pi Theta Epsilon chapter that organizes outstanding scholarly activities developed to increase knowledge, develop professional skills, and contribute to the advancement of the occupational therapy profession.



AOTF Board of Trustees

Seated left – right: Kinsuk Maitra, Jan Polgar, Wendy Coster, Martha Kirkland, Scott Campbell.  
 Standing left – right: Bette Bonder, Elizabeth Francis-Connolly, Amy Lamb, David Emerson, Carolyn Baum, Shawn Phipps, Cheryl Miller, Mary Ellen Buning, Joseph Brey.

## BOARD OF TRUSTEES

As of January 1, 2016

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### Thank you

With the end of the 2015 calendar year, we had several members of the AOTF Board of Trustees end their terms. We would like to recognize and sincerely thank the following Board members whose service ended in 2015: Diana Ramsay (Chair), MPP, OTR, FAOTA; Patricia Booth, MAT (Secretary); Mary Foto, OT, FAOTA, CCM; Susan Fitzpatrick, PhD; Emily Kringle (President, PTE), MOT, OTR/L. Their contributions have significantly impacted the relevance and advancement of the Foundation.

## Securing the Future

The American Occupational Therapy Foundation expresses sincere appreciation for the support provided by so many generous friends during fiscal year 2015 (October 1, 2014-September 30, 2015), including the American Occupational Therapy Association, whose members contribute to the Foundation through their annual AOTA membership dues.

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## 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–September 30:

<b>PROGRAM EXPENSES</b>	<b>2014</b>	<b>2015</b>
Research	\$542,229	\$651,549
Education	\$351,511	\$322,544
<b>Total Program Services</b>	<b>\$893,740</b>	<b>\$974,093</b>
<b>SUPPORT SERVICES</b>		
General and administration	\$276,466	\$468,134
Marketing and development	\$246,334	\$258,207
<b>Total Support Services</b>	<b>\$522,800</b>	<b>\$736,341</b>
<b>Total Expenses</b>	<b>\$1,416,540</b>	<b>\$1,700,434</b>

### STATEMENT OF FINANCIAL POSITION SEPTEMBER 30

<b>ASSETS</b>	<b>FY 2014</b>	<b>FY 2015</b>
Cash and Cash Equivalents	\$72,800	\$195,308
Inventory	\$61	\$2,819
Prepaid Expenses and Other Assets	\$13,082	\$14,972
Interest Receivable	\$25,861	\$9,349
Contributions Receivable	\$26,761	\$99,409
Accounts Receivable	\$55,760	\$23,842
Investments	\$23,426,009	\$21,654,024
Beneficial Interest in Remainder and Perpetual Trusts	\$2,306,769	\$2,041,917
Cash Surrender Value of Life Insurance, Net	\$6,679	\$6,679
Property and Equipment, Net	\$32,402	\$32,572
<b>Total Assets</b>	<b>\$25,966,184</b>	<b>\$24,080,891</b>
<b>LIABILITIES AND NET ASSETS</b>		
Accounts Payable and Accrued Expenses	\$116,541	\$130,308
Liability for Future Interest in Pooled Income Fund	\$1,492	\$1,492
Capital Lease Obligation Total	\$22,369	\$17,606
<b>Total Liabilities</b>	<b>\$140,402</b>	<b>\$149,406</b>
<b>NET ASSETS</b>		
Unrestricted:		
Undesignated	\$17,615,074	\$16,032,543
Board-designated Quasi-endowment Funds	\$456,876	\$456,876
<b>Total Unrestricted Net Assets</b>	<b>\$18,071,950</b>	<b>\$16,489,419</b>
Temporarily Restricted	\$657,652	\$589,536
Permanently Restricted	\$7,096,180	\$6,852,530
<b>Total Net Assets</b>	<b>\$25,825,782</b>	<b>\$23,931,485</b>
 <b>Total LIABILITIES and NET ASSETS</b>	 <b>\$25,966,184</b>	 <b>\$24,080,891</b>

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  
4720 MONTGOMERY LANE, BETHESDA, MD 20814  
(240) 292-1079 • (240) 396-6188 FAX

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