



Together

Building Evidence [^] to Improve Practice & Health[®]

AMERICAN OCCUPATIONAL THERAPY FOUNDATION

ANNUAL REPORT 2019

Letter from the Chair



Dear Friends and Partners,

As we enter the new decade, we have a renewed sense of commitment to shepherding AOTF forward in our continued efforts to not only be responsive to the needs of society and occupational therapy, but also to help shape emergent research priorities to address contemporary challenges. I am writing today to share my reflections on our community, visions of possible futures, and my gratitude and thanks for all your contributions to our efforts.

Each year we identify a theme that can serve as a kind of catalyst to maximize our impact and ensure a cross fertilization of AOTF activities that are enacted across key aspects of our programs. Last year, we focused on community. This coming year we will emphasize family and the multifaceted ways that family matters to the core commitments and mission of AOTF. Matters and mattering are two of my favorite words, because they convey the dual meaning of the substance or particulars of family life and engagements as well as the deep sense of what is really important and meaningful. Although there are characteristics of family that are considered factual or succinctly described, family is situated and lived through the actions, interactions, experiences, relationships, and sociocultural worlds of its members. We will explore how conceptualizations of family can enhance both our understanding and our impact of our collective efforts. In addition, we will integrate this theme into our continued implementation of our new strategic plan.

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As we all know, families have developmental agendas and trajectories; evolve over time, sometimes in unanticipated ways; are shaped by intergenerational patterns; and are highly heterogeneous and diverse. The thematic focus on families will also foster opportunities for self reflection about the AOTF family and identification of opportunities to nurture, renew, expand, and, as needed, modify our collective endeavors. The designation of family can mark a sense of belonging and a quality of connectedness. It is not uncommon for people to say “oh-you are family” when acknowledging a quality of interrelatedness or inclusivity that indicates the centrality of individuals in life who may not have perceived themselves as “family.”

As we chart the future course of AOTF, we seek to learn more about how to best enhance our engagements with you and the extent to which you might feel included in the AOTF family. We solicit your suggestions and inputs. I look forward to working with all of you over this next year as we enact the “next” next steps for AOTF.

2019 has been a very successful and productive year. I want to recognize and commend all of you, our cadre of volunteer committee members, the AOTF staff, and the Board of Trustees on these achievements. I want to specifically congratulate Dr. Varleisha Gibbs and Grace Oni on their recent study and report of AOTF activities over the past several decades entitled *Foundation Research Through the Years: Retrospective Report* (www.aotf.org/About-AOTF). I encourage all of you to read this report and recognize what the amazing AOTF family has accomplished. So congratulations and deep appreciation to all of you for your efforts and contributions. Our future is dependent on the continued collective endeavors of the AOTF.

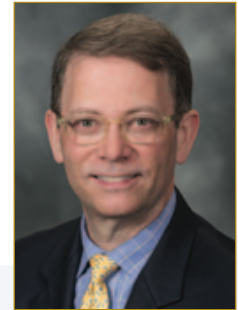
Sincerely,

A handwritten signature in cursive script that reads "Mary C. Lawlor".

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

Partnerships: the Value of an Extended Family

Our annual reports over the last few years have concentrated on our internal partners, the OT community who we serve, but more importantly consider to be our family. With the end of calendar year 2019, the Foundation embarked on a new 3-year strategic plan. Essential to this plan will be an effort to add more external partners to help us extend our family and “advance the science of occupational therapy.” It does indeed take a village.



Two of the pillars of the new strategic plan are to “Expand partnerships with key stakeholders to advance occupational therapy research” and “Establish brand recognition across diverse constituencies.” The Foundation will play an essential role in championing the quality and importance of OT research to the health and research enterprise as a whole. We will seek mutually beneficial collaborations with organizations that help us advance both of our missions.

In an ever-changing health care environment, “team science,” “collaborative care,” “team-based health care” and “interprofessional team health care” are but a few terms that embrace the current concepts of interdisciplinary research and health care. Occupational therapy must be a part of these teams. This will happen if the value of occupational therapy is understood by a wider community. Evidence-based practice rooted in quality research data resulting in effective care and improved quality of life must be OT’s calling card to the research and health care communities. The Foundation is committed to doing our part to champion OT research and practice beyond our own community, not only by collaborations with broader research and health care organizations, but by serving as a champion of all things OT to the world.

A handwritten signature in black ink, appearing to read "Scott Campbell". The signature is fluid and cursive.

Scott Campbell, PhD
CEO

2020-2022 AOTF Strategic Plan Objectives

- **Build Research Capacity in Occupational Therapy**
- **Generate, Translate, and Disseminate Research Knowledge**
- **Expand Partnerships with Key Stakeholders to Advance Occupational Therapy Research**
- **Establish Brand Recognition Across Diverse Constituencies**

AOTF Planning Grant Collective: Third Year and Going Strong

The third AOTF Planning Grant Collective, “Stimulating Research to Enhance Aging in Place: A Continuum of Home and Community-based Services” was held July 21-23, 2019. The planning committee for the workshop was chaired by **Juleen Rodakowski** and included **Carrie Ciro**, **Catherine Lysack**, **Mary Lawlor** and **Tracy Mroz**. A wide range of disciplines were represented at the workshop, as well as several funding agencies including **AHRQ**, **NIDILRR**, **The Michael J. Fox Foundation**, the **American Cancer Society**, and the **Alzheimer’s Association**.

New priority areas of research were identified to advance the following topics:

- Self-report versus Performance-based OT assessment for home living and community dwelling older adults
- Reviewing OTs role in the varying levels of care for community dwelling older adults with cognitive impairment
- Establishing OTs role in the interprofessional team including primary care and preventative care interventions
- Translating OT intervention into practice as related to aging in place

The Foundation plans to convene one Collective a year with 2020 positioned on the topic of telehealth. We believe this interdisciplinary approach to identifying important research topics will result in critical new research in questions of great interest and opportunity for the OT profession.

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Bridging Research, Evidence, and Practice

In 2019, we reached the seventh year of continuous funding for our **Intervention Research Grant (IRG)** program. The IRG grant continues to lay the groundwork to address the Foundation’s mission and vision. With the five new grants, funding amounts total \$1,468,603 with 30 grantees. Current follow-on totals are nearing \$19.5 million of funding to awardees as Principle Investigators or Co-Investigators. The IRG program would not be possible without the support of the American Occupational Therapy Association (AOTA) and the National Board for Certification in Occupational Therapy (NBCOT). And a big thank you to the hundreds of students that supported the IRG program through the 2019 St. Catherine’s Challenge.

The Foundation announced a new grant program in 2018 in partnership with NBCOT®. The **Health Service Research Grant (HSR)** program is positioned to examine how people get access to health care, how and what care is delivered, the cost of that care, and what happens to patients as a result of receiving or not receiving care. Applicants can apply for one- or two-year grants. The initial grant cycle resulted in three grants with a total of \$236,764.98 in funding for 2019-2021.

In August 2019, the **Implementation Research Grant** became our third grant program, funded with support of NBCOT®. The intent of the grant is to examine barriers to implementation, determine how to more efficiently deliver evidence-based practice in the practice setting, address scaling up smaller pilot research studies into larger health systems, measure performance within a practice setting, and develop methods to measure successful implementation specific to the field of OT. One- and two- year grants are available. We thank NBCOT for providing the funding to initiate and sustain this program for the next three years.

The Foundation’s partnerships, and donors, support early career investigators and development of preliminary proof-of-concept research data required for larger funders. As a result, 93% of grantees for the IRG program received federal grant funding. With dissemination of outcomes through approximately 200 publications and presentations, Foundation funded research continues to directly impact the field of OT! We look forward to continuing this work in 2020.

2019 INTERVENTION RESEARCH GRANT RECIPIENTS

Kelly Anderson, PhD, OTR/L East Carolina University—The Role of Success and Failure in the “Just Right Challenge” (Mentor: Anne Elizabeth Dickerson, PhD, OTR/L, SCEDCM, FAOTA, FGSA)

Karen Adler, PhD, OTR/L Colorado State University—Merging Yoga, Occupational Therapy and Education in Diabetes Management (Mentor: Arlene A. Schmid, PhD, OTR, FAOTA)

Kris Barnekow, PhD, OTR/L, IMH-E University of Wisconsin-Milwaukee—Healthy Transitions from NICU to Home: A Pilot Study of the SMILE Curriculum (Mentor: Deborah Brandon, PhD, RN, CNS, FAAN)

Annemarie Connor, PhD, OTR/L Florida Gulf Coast University—A Peer-mediated Vocational Social Skills Program for College Students with Autism (Mentor: Connie Sung, PhD, CRC, LPC)

Candice Osborne, PhD University of Texas Southwestern Medical Center—Facilitated Learning in Stroke Rehabilitation: Using Problem Solving and Technology to Address Health and Risk Factors (Mentor: Kathleen Bell, MD)

2019 HEALTH SERVICES RESEARCH GRANT RECIPIENTS

Teal Benevides, PhD, MS, OTR/L Augusta University—Publicly Insured Utilization & Costs of Care Among Adults on the Autism Spectrum (Mentor: George S. Rust, MD, MPH, FAAFP, FACPM)

Claudia Hilton, PhD, MBA, OTR, FAOTA University of Texas Medical Branch—Activity Participation Predictors in Children with Disabilities (Mentor: Kenneth Ottenbacher, PhD, OTR, FAOTA)

Matthew Malcolm, PhD, BS, OTR/L Colorado State University—Relating OT Intervention Type, Outcomes, and Disparities in Acute Care (Mentor: James E. Graham, PhD, DC)

93% of IRG
Grantees
RECEIVED
Federal Grant
Funding



2019 AWARD RECIPIENTS

Certificate of Appreciation

Liliana Alvarez, PhD

Leadership Service Commendation

Linda Heilman, OTR

Martha Kirkland, OTR

Joan C. Rogers, PhD, OTR/L, FAOTA

Ruth Ann Watkins, MBA, OTR, FAOTA

Meritorious Service Award

Bette R. Bonder, PhD, OTR, FAOTA

Fred Sammons Volunteer Recognition Award

Ruth Ann Watkins, MBA, OTR, FAOTA

Pi Theta Epsilon – Mary J. Bridle First Research Award

Rylie Power

A. Jean Ayres Award

Stefanie Bodison, OTD, OTR/L, C/NDT

Mid-Career Research Excellence Award

Natalie E. Leland, PhD, OTR/L, FAOTA, FGSA

The Academy of Research

Yael Goverover, PhD, OTR/L

Hui-Ing Ma, ScD, OT

Timothy Reistetter, PhD, OTR, FAOTA

Robert Sainburg, PhD, OTR/L

Susan Stark, PhD, OTR/L, FAOTA

The Dr. Gary Keilhofner Doctoral Student Scholarship — A Special Philanthropic Campaign

Gary Kielhofner, DrPH, OTR, FAOTA, was one of the most influential and transformational figures in occupational therapy. The Model of Human Occupation (MOHO) is an innovative framework that had an incredible impact on the profession. But MOHO is only one piece of Gary's legacy. Central to Gary's life was the development of new research talent in occupational therapy. It is an issue that addresses not only the need for more evidence in OT but the need for future leaders in the field.



AOTF is pleased to announce the creation of the Dr. Gary Kielhofner Doctoral Student Scholarship in Occupational Therapy. This scholarship, the first of its kind, will provide financial assistance to an emerging OT scientist as he/she pursues their doctoral degree. This is an excellent opportunity to bolster the future research workforce, help meet the growing demand for evidence in OT and honor Gary in a truly meaningful manner.

AOTF received a special gift in order to make the first award in 2020, the 10th anniversary of Gary's passing. In order to endow this scholarship and ensure that future annual awards are possible we need your help. Please make a gift to support this special scholarship, honor Gary's legacy and strengthen the future of the field.



Mid-Career Research Excellence Award

Natalie E. Leland, PhD, OTR/L, FAOTA, FGSA is the inaugural recipient of the AOTF Mid-Career Research Excellence Award. Dr. Leland's research program significantly contributes to health services research, with a particular focus on gerontology and nursing

home care. Her research focuses on three critical topics: 1) accidental falls in skilled nursing facilities, 2) post-acute care transitions to community, and 3) dementia care in residential nursing homes. Dr. Leland has built an extensive interdisciplinary network of colleagues throughout the world and her work not only highlights, but verifies the distinct value of occupational therapy within the healthcare system's interdisciplinary care team. Her research program has already significantly impacted the present and future of occupational therapy by interconnecting science, practice and health policy. In 2020, the AOTF will introduce an Early Career Research Excellence Award to accompany the Mid-Career Award, to recognize and celebrate emerging research excellence in occupational therapy.

AOTF Thanks Its 2019 Event Sponsors

VIP RECEPTION



BREAKFAST WITH A SCHOLAR

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OCCUPATIONALTHERAPY.COM

BENEFACTOR LEVEL



PATRON LEVEL



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Washington University in St. Louis

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Kristine Haertl, PhD, OTR/L, FAOTA
West Coast University

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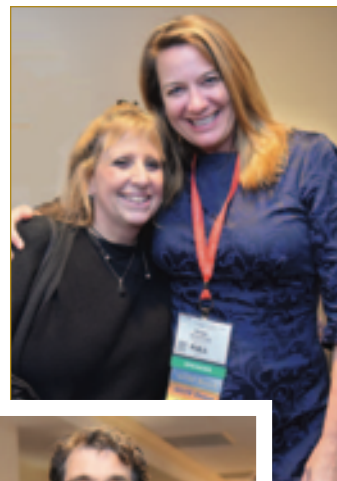
EXPLORER LEVEL

West Coast University

Special Thank You to OCCUPATIONALTHERAPY.COM

AOTF's Events at the 2019 AOTA

AOTF's **VIP Reception** honored our major donors, conference sponsors, volunteers, and leadership who help support our growing research program portfolio. **Simone Gill, PhD, OTR/L**, Program Director and Assistant Professor at Boston University, AOTF Board of Trustees member, along with being a 2015 IRG recipient provided a "mission moment." Dr. Gill shared her thoughts on the impact of AOTF research funding on her career and her recent participation as an Ad Hoc reviewer on the 2019 Intervention Research Grant selection process.



Annual Conference, New Orleans



Breakfast with a Scholar

The Breakfast featured Alan Hobson, international best-selling author and worldwide adventurer who spoke about facing a very aggressive cancer of the blood, "Success isn't about height. It's about depth—the depth of our experiences and the depths to which we must sometimes reach to climb back from our setbacks in life."



The ***State of the Science Symposium*** topic was Caregiving and Family Matters: OT Contributions to Enhancing Health, Quality of Life, and Participation. Symposium speakers included Mary C. Lawlor, ScD, OTR/L, FAOTA, Carol Haywood, PhD, OTR/L, Jill Cameron, PhD, Kristina Kokorelias, PhD(C), Linda Tickle-Degnen, PhD, OTR/L, FAOTA, and Megan E. Gately, OTD, OT.

St. Catherine Challenge: Students Supporting OT Research

AOJF 2019
ST. CATHERINE
CHALLENGE

The 2019 St. Catherine's Challenge was a record breaking event! 56 schools raised over \$52,000 which is the highest levels of participation and fundraising in the Challenge's seven-year history. The funds raised in 2019 will fully fund one Intervention Research Grant (IRG) in 2020. Every school that participated in this challenge should be proud of their creativity, dedication, and enthusiasm that led to this amazing achievement.

Thank you to all the schools, and all the student leaders, who participated in the 2019 Challenge. Join us in the 2020 Challenge and be a part of the community advancing the science of OT.



The San Jose State team, 2019 St. Catherine's Challenge Winner, celebrate their victory!

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THANK YOU 2019 ST. CATHERINE CHALLENGE PARTICIPANTS!

DIAMOND LEVEL \$7,500+

San Jose State University
Columbia University

PLATINUM LEVEL \$5,000+

University of Pittsburgh

GOLD LEVEL \$2,500+

Washington University School of Medicine in St. Louis
St. Catherine University
Misericordia University

SILVER LEVEL \$1000+

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Ohio State University
University of North Carolina – Chapel Hill
Texas Women's University – Houston
University of South Dakota
Dominican College
Medical University of South Carolina
Rush University

University of Mary
University of Scranton
Virginia Commonwealth University

CHALLENGE PARTICIPANTS

Saint Louis University
Texas Woman's University – Dallas
University of Oklahoma Health Sciences Center
Towson University
Texas Woman's University, Denton
Texas Tech University Health Sciences Center
Touro University Nevada
Boston University
East Carolina University
Salus University
Indiana State University

MGH Institute of Health Professionals

University of Tennessee Health Sciences Center

Brenau University
Spalding University

University of Texas Medical Branch – Galveston

Maryville University
Stanbridge University
D'Youville College

Louisiana State University Health Sciences Center – New Orleans

University of Central Arkansas

University of Missouri College of St. Scholastica

56 Schools
RAISED OVER
\$52,000



Colorado State University
Mary Baldwin University
Northern Arizona University
Missouri State University
Nova Southeastern University – Tampa
Rockhurst University
Sacred Heart University
Saginaw Valley State University
University of Findlay



TEAMWORK



OTJR Impact Factor Continues to Climb

2018 OTJR
Impact Factor
ROSE TO
1.234



OTJR: *Occupation, Participation and Health*, AOTF's peer-reviewed research journal, is pleased to announce our 2018 Impact Factor increased from 1.00 to 1.234! This historical growth represents the contributions of quality data-driven research from authors and the rigorous processes of OTJR's Editor-In-Chief (**Sherrilene Classen PhD, MPH, OTR/L, FAOTA, FGSA**), Assistant Editor, Associate Editors, Editorial Fellows, Review Board Members, and SAGE Publishing Partners.



Pi Theta Epsilon Supporting Excellence in Occupational Therapy

Pi Theta Epsilon (PTE), the national occupational therapy honor society continues to advance its mission to support occupational therapy by promoting research, leadership, and scholarly activities. 126 schools now have active chapters, with Drake University, New York University, Georgia State University, A.T. Still University, Cox College, and Clarkson University joining PTE in 2019.

In a successful transition from Conclave to Conference, PTE held and sponsored several events at the AOTA Annual Conference in New Orleans, Louisiana which included, PTE Faculty Advisors' Workshop, PTE Poster Session & Reception, and the PTE Annual Business Meeting. In collaboration with Drs. Susan Murphy and Susan Lin, PTE also hosted its first Speed Mentoring Session with plans to continue the program annually.

PTE now has an OT Honor Society channel on YouTube that allows members to view a variety of videos from tips on how to have a successful St. Catherine's Challenge to feedback on PTE events held during the 2019 AOTA Conference in New Orleans. Additionally, PTE held and launched a live Beginner's Orientation session in November that can now be downloaded to help active and potential new chapters navigate a variety of topics associated with PTE and what a PTE membership can offer. PTE plans to turn this live webinar into an annual broadcast.

For a third consecutive year, PTE's successful partnership with OccupationalTherapy.com offered free continuing education credits to its active alumni and lifetime members. In 2019, PTE and OccupationalTherapy.com offered 3 courses: Executive Functions and Everyday Activities; Ethics in Rehabilitation: A Clinical Perspective for Occupational Therapists; and Finding the Sweet Spot in Functional Cognition Intervention: Grading Tasks to Maximize Outcomes. Each course is approximately 1-hour long, and students that complete the course are eligible for CEU credit.

Finally, PTE expanded upon its awards and scholarship program with the addition of The Grant for Excellence in Inter-Chapter Collaboration allowing chapters to gain experience in writing a grant with the possibility of being funded by PTE National to host a joint event between multiple chapters.

126 PTE
CHAPTERS



Strengthening the Future of OT

The American Occupational Therapy Foundation is immensely grateful to our generous donors who made gifts during the fiscal year 2019 (October 1, 2018-September 30, 2019). The full list of donors is available at www.aotf.org.

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\$50 Million+
RECEIVED
In Follow-On
Research Funding



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Cheryl Strickland
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Linda Tickle-Degnen
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To Advance The
Evidence of OT



\$250-\$499 continued

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314 Grant AWARD Winners



“Getting the IRG was a definite boost to my career and allowed me to acquire greater visibility in the field. I was also recently promoted from Assistant to Associate Professor... I think the biggest value is providing support for larger OT grant funded research and also building the preliminary evidence for role of OT in non-traditional practice areas.”

—Mansha Mirza, PhD, OTR/L, MSHOR, IRG Recipient 2016, University of Illinois at Chicago



“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. 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, Distinguished Professor, University of Missouri; Academy of Research member; Intervention Grant Recipient; Formerly of the University of Kansas Medical Center

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WHY SUPPORT AOTF

OTs give because they care. They are driven by passion and compassion. It is these fundamental qualities that make them so outstanding at helping people live meaningful and independent lives. But what makes occupational therapy so valuable for clients is the ability of therapists to combine their talent with scientific evidence in their interventions and treatment plans. Evidence is essential to quality care and to improving both individual and societal health. At AOTF we are dedicated to:

- advancing the science of occupational therapy by supporting new research
- bolstering the research workforce
- disseminating new knowledge.

When you make a philanthropic gift to AOTF you are helping fill a critical gap in OT research funding and you are demonstrating your passion for strengthening the future of the field. OTs give because they care. Please make a gift this year and together we will **Build Evidence to Improve Practice and Health.**

AOTF Board of Trustees and Staff Members

(as of March 1, 2020)

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Brian Dombkowski, Sand Hill Global
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Staff Updates

CONGRATULATIONS

In August 2019, Helene Ross retired from her position devoting over 20 years of her expertise to the Foundation. She held a number of positions with the Foundation over the years, culminating as the Communications Associate.

WELCOME

Varleisha Gibbs joined the AOTF team in March 2019 as the Scientific Program Officer. Assisting Varleisha with the grant programs, Grace Oni came on board as the part-time Grant Administrator in April 2019 and has since been promoted to full-time. David Robertson was promoted from the Office Assistant to the PTE Member and Program Coordinator in May 2019 and Kristin Bukovsky joined AOTF in October 2019 as the Communications Manager. Sandy Weiss began as the Office Assistant in December 2019. AOTF also had several interns from the University of the Sciences assist the Scientific Programs Officer in the Foundation's research efforts, Delaney Booth, Sierra Clair, and William Librizzi.



DEDICATION



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, 2018–September 30, 2019:

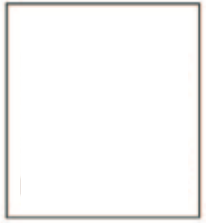
PROGRAM EXPENSES	2019	2018
Research	\$820,634	\$619,043
Education	\$329,079	\$333,976
Total Program Services	\$1,149,713	\$953,019
SUPPORT SERVICES		
General and administration	\$461,364	\$410,097
Marketing and development	\$288,617	\$272,846
Total Support Services	\$749,981	\$682,943
Total Expenses	\$1,899,694	\$1,635,962

STATEMENT OF FINANCIAL POSITION SEPTEMBER 30

ASSETS	FY 2019	FY 2018
Cash and Cash Equivalents	\$319,465	\$256,905
Inventory	\$1,886	\$358
Prepaid Expenses and Other Assets	\$51,241	\$9,471
Interest Receivable	\$4,112	\$5,667
Contributions Receivable	\$1,446,922	\$849,642
Accounts Receivable	\$2,007	\$14,717
Due from AOTA	\$11,441	\$9,278
Investments	\$26,877,238	\$26,023,239
Beneficial Interest in Remainder and Perpetual Trusts	\$2,128,167	\$2,211,438
Property and Equipment, Net	\$49,684	\$43,868
TOTAL ASSETS	\$30,892,163	\$29,424,583
LIABILITIES AND NET ASSETS		
Accounts Payable and Accrued Expenses	\$165,974	\$155,850
Liability for Future Interest in Pooled Income Fund	\$1,492	\$1,492
Capital Lease Obligation Total	\$19,586	\$24,469
TOTAL LIABILITIES	\$187,052	\$181,811
NET ASSETS		
Unrestricted:		
Undesignated	\$18,288,830	\$18,587,189
Board-designated Quasi-endowment Funds	\$456,876	\$456,876
Total Unrestricted Net Assets	\$18,745,706	\$19,044,065
Temporarily Restricted	\$3,546,553	\$2,606,324
Permanently Restricted	\$8,412,852	\$7,592,383
TOTAL NET ASSETS	\$30,705,111	\$29,242,772
TOTAL LIABILITIES AND NET ASSETS	\$30,892,163	\$29,424,583



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