

2023

ANNUAL REPORT

STRENGTHENING
PARTNERSHIPS

FROM OUR CHAIR



The AOTF's strategic plan provides a compass for the everyday work of the Foundation. Approved by the AOTF Board of Trustees (BOT) in December 2022, the current strategic plan focuses on four distinct strategic pillars, one of which is an effort "to support research dissemination." An important strategy in this pillar is to **create and strengthen relationships between occupational therapy scientists and the individuals who are living with and affected by conditions who potentially benefit from occupational therapy research.** Many of you may think, "this strategy is not innovative as the majority of funding organizations require some level of community engagement." Admittedly biased, I believe that AOTF is distinctly different from other organizations who are heeding the call for community engagement. AOTF has always had individuals from communities we serve on the BOT as voting members. Because of their lived experiences and

the importance of those experiences on research and practice, community partners are frequent scholars at our Foundation Friday event "Breakfast with a Scholar" at the AOTA Inspire Conference. Two recent leaders of the AOTF Board of Trustees (BOT) were Slagle Lecturers, and their lectures were focused on authentic engagement. Dr. Mary Lawlor (2023 AOTA Eleanor Clark Slagle Lecture, AOTF Chair of BOT 2018-2020) educated us about the importance for people to "**tell their stories**" and describe "**what is important to them,**" while Dr. Kristie Patten (2022 AOTA Eleanor Clarke Slagle Lecture, AOTF Vice-Chair of BOT 2020-2022) challenged us to **confront ableism in our profession.** Drs. Lawlor's and Patten's convictions about authentic community engagement were influential during their AOTF tenure and helped to seed the Foundation's strategic effort to "**create and strengthen relationships with community partners.**" Some of the relevant initiatives in the current strategic plan include engaging community partners in the AOTF Planning Grant Collective and requiring AOTF grant awardees to authentically engage individuals with lived experiences in their research plan, implementation and dissemination, and to describe how they will communicate their research findings in ways that are assessable to community partners. Perhaps the most exciting initiative under the strategic objective "**create and strengthen relationships with community partners**" is an AOTF Community Engagement Meeting that is planned for October 10-11, 2024 in Old Town Alexandria, Virginia. AOTF has assembled an incredibly gifted program committee that has been meeting regularly under the leadership of Drs. Jessica Kramer and Susan Magasi. AOTF has also contracted with a professional meeting planner to oversee the business logistics of the meeting such as the hotel contract, registration, and abstract submission. I invite you to monitor our announcements about this inaugural community engagement conference and to join us in Old Town Alexandria to create new and strengthen existing relationships with individuals from the communities we serve.

Mary Jane (MJ) Mulcahey, PhD, OTR/L
Chair, AOTF Board of Trustees

A handwritten signature in black ink, appearing to read "MJ Mulcahey".

FROM OUR CEO



CHARTING A PATH TO 60

Every three years, the Foundation Board of Trustees and staff work together to generate a strategic plan to guide the Foundation in its efforts to achieve its mission, “to advance the science of occupational therapy to support people’s full participation in meaningful life activities.” This document has 3-4 overarching themes or strategic pillars, as well as more specific objectives and action items to support the OT research community, while always keeping in mind the OT practice community who utilize the advances made in research to provide evidence-based care, and community partners and clients who will ultimately benefit from quality care provided by OT practitioners. The Foundation began a new strategic plan in 2023 and this plan will take us to our sixtieth anniversary in 2025.

Central to the current and previous Foundation strategic plans is “building research capacity in occupational therapy”. In order for the OT research enterprise to function and provide critical research advances to inform clinical practice, we need talented OT scientists to generate the research data. The Foundation invests in both research and research investigators. Of course, data in and of itself means little if it cannot be shared with the clinical practice community and translated into real-world practice settings. In her letter, Chair Mulcahey has highlighted in much more detail the importance of dissemination of research findings.

Our new strategic plan also has several objectives designed to help “establish partnerships between researchers and practitioners”. Researchers and practitioners need to work more closely together in order to generate relevant research questions and to conduct research that has the ability to be implemented in a complex and challenging health care system. Finally, the plan gives guidance to means by which the Foundation can strengthen our existing leadership in the OT enterprise. Our path to success in meeting our vision and mission requires a true partnership between Foundation Board, staff and volunteers, as well as support from the OT research and practice communities, and our community partners. Together we can forge a path towards new breakthroughs in research and practice.

Scott Campbell, PhD
AOTF CEO

A handwritten signature in black ink, appearing to read 'SC Campbell', written over a white background.

2023-2025 STRATEGIC PILLARS

- **Build research capacity in occupational therapy**
- **Build infrastructure to support research dissemination**
- **Establish partnerships between researchers and practitioners**
- **Strengthen AOTF leadership in the occupational therapy enterprise**

RESEARCH GROWTH & GAINS

FUNDING AND PARTNERSHIPS

The Foundation continues to support people's full participation in meaningful life activities through its robust strategic plan which includes funding, educational programs, and publications such as the quarterly journal, *OTJR: Occupational Therapy Journal of Research*.

With support from our partners and donors, we invest in OT scientists, through vital funding programs such as grants, scholarships and fellowships. Over the years they have continued to lay the groundwork to accomplish the Foundation's mission and vision.

In 2023, we reached the 11th year of continuous funding for our **Intervention Research Grant (IRG)** program. With five new recipients, the total IRG funding amounts to \$196,478 for the year 2023 (release of funds pending). The IRG program would not be possible without the support of the American Occupational Therapy Association (AOTA). We also extend a big thank you to the hundreds of students who supported the IRG program through the St. Catherine's Challenge.

In its fifth year, the **Health Service Research Grant (HSR)** program, in partnership with NBCOT, 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 clients because of receiving or not receiving care. With two new grant recipients this year, the total HSR funding amounts to \$195,808 for the year 2023.

In its fourth year, the **Implementation Research (IR) Grant**, in partnership with NBCOT, examines barriers to implementation, determines how to more efficiently deliver evidence-based practice in the practice setting, addresses scaling up smaller pilot research studies into larger health systems, measures performance within a practice setting, and develops methods to measure successful implementation specific to the field of OT. With three new grant recipients this year, the total IR funding amounts to \$300,000 for the year 2023. We thank NBCOT for providing the funding to initiate and sustain this program.

Over the years, several AOTF grant recipients have received follow-on federal grant funding and have made a significant impact on the field of OT and patient care using the outcomes of their research work funded by the AOTF.

INTERVENTION RESEARCH GRANT RECIPIENTS

Kelle DeBoth Foust, PhD, OTR/L, Cleveland State University
Building Resilience and Social-Emotional Skills in Under-Resourced Preschoolers with History of Trauma (Mentor: Susan Bazyk, PhD, OTR/L, FAOTA)

Andrea Fairman, PhD, MOT, OTR/L, Johnson and Wales University
Clinical Efficacy of CO-OP and mHealth to Support Self-Catheterization in Youth with Spina Bifida (Mentor: Douglass Clayton, MD)

Mark Hardison, PhD, OTR/L, University of New Mexico
Feasibility of the Restorative Occupational Approaches for Disordered Eating (ROADE) Program (Mentor: Catana Brown, PhD, OTR, FAOTA)

Emily Kringle, PhD, OTR/L, University of Minnesota
duoABLE: Feasibility of a Behavioral Activation-Based Intervention to Reduce Sedentary Behavior Among People with Stroke and their Caregivers (Mentor: Beth Lewis, PhD)

HEALTH SERVICES RESEARCH GRANT RECIPIENTS

Joshua Johnson, DPT, PhD, Cleveland Clinic
Defining Value-Based Care in Acute Care Occupational Therapy: A Learning Health System Approach (Mentor: Elizabeth Skidmore, PhD, OTR/L)

Corey Morrow, PhD, MOT, OTR/L, Medical University of South Carolina (formerly with Whitworth University)
Access to Telerehabilitation for Rural and Socially Disadvantaged Stroke Survivors During COVID-19 (Mentor: Kit Simpson, DrPH)

IMPLEMENTATION RESEARCH GRANT RECIPIENTS

Chiao-Ju Fang, PhD, OTR/L, San Jose State University
Implementation of App-Based Coaching Intervention (Social Participation and Navigation; SPAN) to Promote Participation of Young Adults with Autism Spectrum Disorders (ASD) (Mentor: Laurie Drabble, PhD)

Aviva Wolff, EdD, CHT, OT, Hospital for Special Surgery
Implementation Science to Prevent and Reduce Musculoskeletal Occupational Injuries in Musicians (Mentor: Laura Robbins, DSW)

Angela Shierk, PhD, OTR, Texas Woman's University
Implementation of Therapy Together, a Pediatric Constraint Induced Movement Therapy Program, with Early Childhood Intervention (Mentor: Janet Prvu Bettger, ScD, FAHA)

SCHOLARSHIPS AND FELLOWSHIPS

The future of OT emerging research is embedded in the development of an up-and-coming research workforce capable of building new evidence to inform everyday practice and improve health. Thanks to generous donors, AOTF invests in and recognizes exceptional OT research scientists early in their careers providing funding to doctoral students and postdoctoral researchers. The AOTF celebrates the recipients of Scholarships and Fellowships for 2023:

Dr. Gary Kielhofner Doctoral Student Scholarship

Amy Roder McArthur, PhD Candidate, MS, OTR/L

University of Illinois Chicago

Exploring Breast Cancer as Disability: A Qualitative Interpretative Phenomenological Analysis Dissertation Research Study

(Mentor: Joy Hammel, PhD, OTR/L, FAOTA)

Nedra Gillette Endowed Research Fellowship

Cristin Holland, PhD, OTR/L

Columbia University Irving Medical Center

Maternal Activity Engagement in Pregnancy and Fetal Well-being: A Pilot Study

(Mentor: Marisa Spann, PhD, MPH)

Bonita Kraft Doctoral Student Scholarship

Clarissa Mireau, MA, OTR/L, TPS

Minnesota Department of Human Services

Effectiveness of Occupational Therapy Services for Individuals with Co-Occurring Mental Illness and Substance Use Disorders in Intensive Residential Treatment: A Retrospective Study

(Mentor: Sally Wasmuth, PhD, OTR)

Nancy Talbot Postdoctoral Research Fellowship

Dominique Como, PhD, EdM, OTR/L

University of Pittsburgh

Exploring the Factors Impacting the Experiences of Underrepresented Older Adults in Post-Acute Care Facilities

(Mentor: Natalie Leland, PhD, OTR/L, BCG, FAOTA, FGSA)

TRAINING GRANTS

This past year, AOTF's Standing for Research Inclusion, Diversity, and Equity (STRIDE) committee offered research funds to five OT graduate students and clinicians from underrepresented groups to support their participation in a mentored research experience. With the first three STRIDE OT Research Fund (SRF) recipients in 2022 and five in 2023, a total amount of \$80,000 has been awarded so far. Final presentation/dissemination platform for the SRF recipients was changed from a virtual presentation to a in-person presentation at the AOTA INSPIRE Conference to showcase the SRF experience to a wider audience, and in doing so, ensuring the promotion of OT research careers among underrepresented groups.

STRIDE OT Research Fund

\$50,000 will be awarded for the year 2023-2024 amongst the five recipients:

Vanessa Fry, OTD

Thomas Jefferson University

Exploration of Interception as an Approach for Supporting Children with Autism in Navigating Puberty

(Mentor: Kristie Patten, PhD, OT/L, FAOTA)

Grace Muppidi, OTD

Boston University

The Caregiver Resilience Education (Ca.R.E.) Program

(Mentor: Ricardo Carrásco, PhD, OTR/L, FAOTA)

Adrienne Smiley, OTD

University of Pittsburgh

Pharmacoepidemiology, Carcinogenesis, and Oncology Rehabilitation: Imperatives for Occupational Therapy

(Mentor: Kathleen Lyons, ScD, OTR/L)

Rachel Ohene, MOT

Liberate Healing and Consulting

The Occupation of Participating in Healthcare for Pregnant and Postpartum People of Color

(Mentor: Leanne Yinusa-Nyahkoon, ScD, OTR/L)

Christopher Gaskins, MS, OTR/L

Howard University

An Examination of the Production and Employment Trends of Black Occupational Therapists Who Attended a HBCU or non-HBCU

(Mentor: Moses Ikiugu, PhD, OTR/L, FAOTA)



ENGAGEMENT AND PARTNERSHIPS:

TRAINING IN DIVERSITY EDUCATION PROGRAM

AOTF's joint partnership with the NIH R25 grant funded 'Training in Diversity education' or TiDe program educates current rehabilitation clinician scientists in the skills and knowledge needed to recruit, train, and support research trainees from populations underrepresented in biomedical science. TiDe conducted its first annual workshop on August 10-13, 2023, in Alexandria, Va.

WORKSHOP IN IMPLEMENTATION SCIENCE AND HEALTH SERVICES

In May 2023, AOTF co-sponsored, for a 2nd consecutive year, the Workshop in Implementation Science and Health Services: Advancing Grant Writing Skills for Rehabilitation Researchers (WISH) with CoHSTAR and Learning Health Systems Rehabilitation Research Network (LeaRRn). This year's 24 participants included 14 Occupational Therapists, six being AOTF-funding recipients. Participants learned about grant writing, new funding opportunities and worked to hone research proposals specifically related to Health Services and Implementation Science rehabilitation research.

OT SUMMIT

In Summer of 2023, AOTF co-sponsored the OT Summit at The Ohio State University. OT Summit is a collaboration between the OT academic programs at the University of Florida, Washington University in St. Louis, University of Washington, and The Ohio State University. It is designed for career scientists at every stage of development. This year's program included presentations and/or discussions led by AOTF grantees, awardees, and affiliates, along with our very own Chief Scientific Officer, Satvika Garg, PhD, OTR/L.

PLANNING GRANT COLLECTIVE

In October, AOTF brought together over 45 OT and collaborative leaders in Alexandria, Va. for the AOTF Planning Grant Collective workshop, "Functional Cognition: Moving the Science Forward." The focus of this two-day program was to clarify and advance occupational therapists' critical role in functional cognition across different age groups and care settings. It also set priorities for functional cognition research and to identify and address the gaps in evidence, to advance the science, and to influence education, practice, and policy.

RESEARCH PRIORITIES:

The 2022-2025 research priorities emerged from a year-long process which included an environmental scan and review by the AOTF Scientific Advisory Council and Board:

- Health Promotion, Prevention and Management of Chronic Conditions
- Mental Health and Well-Being
- Technology and Environmental Supports in the Home and Community
- Development and Transitions for Individuals and Families
- Equitable Access and Use of Health and Community Services
- Family and Caregiver Supports, Resiliency, and Well-Being
- Novel Practice Areas and Approaches to Service Delivery

DISSEMINATING RESEARCH:

2023 has been a year of continued growth and innovative change for our research publication which transitioned to its original name **OTJR: Occupational Therapy Journal of Research**. The 2022 Impact Factor is 1.4 and the 5-Year Impact Factor is 1.9. To meet the ambitious goals of *OTJR*, we've expanded the size and expertise of the Editorial Board, implemented a reviewer in training program, and diversified types of manuscripts published by the Journal to include brief reports, book reviews, and invited commentaries. We published a successful special issue on telehealth that included 22 high-quality articles in July and issued a call for papers on the practical application of the Person-Environment-Occupation-Performance Model for an upcoming 2024 special issue. *OTJR's* publicly available video, *Enhancing Success in Publishing Peer-Reviewed Research*, geared towards graduate students, post-doctoral fellows, and early career researchers has been viewed over 400 times! Additionally, *OTJR's* social media presence grew to over 3,500 AOTF/*OTJR* Instagram followers and 700 X followers providing new avenues for innovative dissemination of occupational therapy research. This continued growth represents the contributions of quality data-driven research from authors and the rigorous processes of **OTJR's Editor-In-Chief, Timothy J. Wolf, OTD, PhD, OTR/L, FAOTA**, Assistant Editor, Associate Editors, Editorial Fellows, Review Board Members, and SAGE Publishing.

RESEARCH EXCELLENCE

FULFILLING THE MISSION

The AOTF Academy of Research in Occupational Therapy recognizes individuals who have made exemplary, distinguished, and sustained contributions toward the science of occupational therapy.

ACADEMY OF RESEARCH



Sook-Lei Liew, PhD, OTR/L is a tenured Associate Professor at the University of Southern California (USC) Mrs. T.H. Chan Division of Occupational Science and Occupational Therapy with joint appointments in the USC Division of Biokinesiology and Physical Therapy, the USC Department of Neurology within the Keck School of Medicine,

and the USC Department of Biomedical Engineering within the Viterbi School of Engineering. Dr. Liew is also the Director of the Neural Plasticity and Neurorehabilitation Laboratory, member of the USC Stevens Neuroimaging and Informatics Institute, and a Founder and Co-director of the USC SensoriMotor Assessment and Rehabilitation Training in Virtual Reality (SMART-VR) Center. She is a registered and licensed occupational therapist specializing in adult neurology and physical disabilities, a Certified Strength and Conditioning Specialist® (CSCS), a Fellow of the American Heart Association Research Leaders Academy, and a Fellow of ReproNim/INCF Program jointly sponsored by the Center for Reproducible Neuroimaging Computation (ReproNim) and the International Neuroinformatics Coordinating Facility (INCF).



Carolyn A. Unsworth PhD, BAppSci(OccTher), GCTE, OTR, MRCOT, FOTARA is the Discipline Lead of Occupational Therapy at Federation University, and holds adjunct professorial appointments at Monash, and James Cook University in Australia, and Jönköping University in Sweden. Her research is supported by

competitive grants from both government agencies and philanthropic organisations and focusses on promoting community transport mobility for people with disabilities including driver assessment and rehabilitation and public transport access. Dr. Unsworth's research informs government fitness-to-drive guidelines and bus access policy. She is also known for her contributions to the fields of health outcome measurement and clinical reasoning. Her assessment tools, the Australian Therapy Outcome Measures (AusTOMs-OT) and Occupational Therapy Driver Off Road Assessment (OT-DORA) are used internationally. Carolyn is a supervisor of higher research degree students (PhD and Masters). She has published widely in leading journals such as the Journal of Transport and Health, Ageing and Society, and the Journal of Alzheimer's Disease.

LEADERSHIP SERVICE COMMENDATION

Tracey Ellis, OTR/L, MPH, CEO & Founder, International Diagnostic Solutions, Inc. and Ellis Therapeutic Consultant, Inc. Washington, DC
Elizabeth Pfeiffer, PhD, OTR/L, BCP, FAOTA, Associate Professor, Department of Health and Rehabilitation Sciences; Director of the REACH Lab, Temple University

AOTF MERITORIOUS SERVICE AWARD

Nancy Baker, ScD, MPH, OTR/L, FAOTA, Tufts University
Felicia Chew, MS, OTR/L, FAOTA, FNAP, President, Integrity Health Solutions, Mount Royal, New Jersey
Donald Fogelberg, PhD, OTR/L, Associate Professor, Department of Rehabilitation Medicine, University of Washington Seattle, Washington
Susan Magasi, PhD, MS, BScOT, Associate Professor, Occupational Therapy; Associate Professor, Disability and Human Development; Associate Head, Occupational Therapy, Department of Occupational Therapy and Disability Studies, University of Illinois at Chicago, Chicago, Illinois
Kerri Morgan, PhD, OTR/L, ATP, Assistant Professor of Occupational Therapy and Neurology, Washington University School of Medicine, St. Louis, Missouri
Kristie Patten, PhD, OT/L, FAOTA, Vice Dean of Academic Affairs, Professor of Occupational Therapy Steinhardt School of Culture, Education, and Human Development, New York University, New York, New York

FRED SAMMONS VOLUNTEER RECOGNITION AWARD

Bonita Kraft, retired occupational therapist practicing in behavioral health focusing on schizophrenia, psychosis, depression, bipolar disorder and other personality disorders, Camarillo, California

A. JEAN AYRES AWARD

Teresa May-Benson, ScD, OTR/L, FAOTA, Owner, President, TMB Occupational Therapy Resources, Inc. Norristown, Pennsylvania

VIRGINIA SCARDINA AWARD OF EXCELLENCE

Erna Imperatore Blanche, PhD, OTR/L, FAOTA, Clinical Professor of Occupational Therapy, Chan Division of Occupational Science and Occupational Therapy, University of Southern California, Los Angeles, California

EARLY CAREER RESEARCH EXCELLENCE AWARD

Lisa Juckett, PhD, OTR/L, CHT, Assistant Professor, Division of Occupational Therapy, The Ohio State University, Columbus, Ohio

MID-CAREER RESEARCH EXCELLENCE AWARD

Elizabeth Pyatak, PhD, OTR/L, CDCES, FAOTA, Director of the Lifestyle Redesign® Knowledge Mobilization Initiative, and Associate Professor, Division of Occupational Science and Occupational Therapy, University of Southern California, Los Angeles, California

PI THETA EPSILON MARY J. BRIDLE FIRST RESEARCH AWARD

Sarah Synak, OTD, OTR/L, Creighton University

AOTF AT AOTA INSPIRE CONFERENCE

FOUNDATION FRIDAY

Our signature events at AOTA INSPIRE Conference 2023 went virtual with over 1,100 attendees. Thank you to all of our event sponsors who make these events possible, we appreciate your commitment to our mission.

BREAKFAST WITH A SCHOLAR

Fearlessly Different

Mickey Rowe, Founding Artistic Director of the National Disability Theatre, shared his deeply personal and inspiring story of growing up autistic and pushing beyond the restrictions of a special education classroom to shine on Broadway.

STATE OF THE SCIENCE

Shifting the Culture of Occupational Therapy Scholarship Through Community-Engaged Research

Teal W. Benevides, PhD, MS, OTR/L, FAOTA, Institute of Public and Preventive Health, Augusta University
Janet L. Poole, PhD, OTR/L, FAOTA, Occupational Therapy Graduate Program, University of New Mexico
Yolanda Suarez-Balcazar, PhD, Department of Occupational Therapy, University of Illinois Chicago
Karla Ausderau, PhD, OTR, FAOTA, Department of Kinesiology, Occupational Therapy Program, Waisman Center, University of Wisconsin - Madison

FUTURE SCIENTISTS INSTITUTE

A cohort of entry-level OT students participated in the **AOTF/AOTA Future Scientists Institute**, in Kansas City, Missouri. The facilitators and mentors included faculty and doctoral/postdoctoral students from established research programs from around the nation. Program participants met with leading occupational therapy scientists to address topics such as possibilities within OT science, considerations when evaluating potential doctoral programs, and career opportunities as a scientist. The participants were also invited to our Breakfast with a Scholar, State of the Science and Research Excellence programs, AOTA's Presidential Farewell/Inaugural Addresses, as well as the Eleanor Clarke Slagle Lecture by Mary Lawlor, ScD, OTR/L, FAOTA, Past AOTF Board Chair.



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AOTF TRANSFORMING LIVES.

Occupational therapists are on the front lines of serving people in hospitals, rehabilitation centers, homes, schools, and in a variety of emerging practice areas in the community. With a growing need for occupational therapy services, our profession requires robust and current evidence to inform practice and delivery of high-quality occupational therapy programs to our clients. To build the evidence in demand, the American Occupational Therapy Foundation is funding new OT research grants, research programs and future researchers. This work is vital to strengthening occupational therapy and to improve the delivery of care.

A critical gap that exists in OT research is the limited availability of seed-funding for the development of new and novel ideas in order to generate preliminary data as proof of concept. AOTF key grant programs, the Intervention Research Grants, the Health Services Research Grants and the Implementation Research Grants, support early-stage research that provide OT researchers the resources to build evidence in demand.

During the last eight years, AOTF has funded over 50 early-stage research grants that cover more than two dozen different topics. All of these grants were made possible through the philanthropic generosity of a community of donors. Now, with the input of our volunteers and feedback from our community, the Foundation is making mental health, COVID-19 and representation of underserved and marginalized communities a priority for our work this year.

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. When you make a gift to AOTF you help build the evidence that OT practice needs, that clients and caregivers need. AOTF is the only organization dedicated to advancing the science of occupational therapy and one of the few places funding early-stage OT research, which is critical to develop new and improved interventions. Help us continue the investment into new OT research, to address the needs of evidence-based practice and to improve the delivery of care. Your philanthropic gift to AOTF will strengthen occupational therapy and we are so grateful for your support.



THERE IS A GIFT THAT'S RIGHT FOR EVERYONE:

- An annual gift helps build new evidence vital to delivery of quality care.
- A monthly recurring gift is an easy way for you to provide consistent support to AOTF throughout the year.
- A major gift can spark a whole new focus on an area in need.
- A bequest gift through your estate establishes a legacy that will impact the profession for generations.

THANK YOU DONORS!

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Branch PTE Nu Chapter

CELEBRATING A DECADE

ST. CATHERINE CHALLENGE

OT students know that having the best, most recent and most relevant evidence is vital to delivering the best quality care for OT clients. The St. Catherine Challenge is the annual student-led fundraising initiative that raises money for the AOTF Intervention Research Grant Program, a unique early-stage research grant that enables OT researchers to collect pilot data and build proof of concept for new and novel ideas.

57 SCHOOLS RAISED OVER \$53,000 FOR AN AOTF INTERVENTION RESEARCH GRANT



Top fundraising schools:

- 1st Place- St. Catherine University (pictured above w/ Breakfast Scholar speaker)
- 2nd Place- University of Pittsburgh
- 3rd Place- University of Southern California Chan Division
- MVP- Missouri State University
- Rush to the Top- Yeshiva University and University of Wisconsin-Madison

We also are proud to recognize the OT programs which achieved **100% faculty participation**:

100% faculty participation:

- Gwynedd Mercy University
- Missouri State University
- Towson University
- St. Joseph's University
- Yeshiva University

PI THETA EPSILON



Baker College (Alpha Xi)

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. 142 schools now have active chapters across the United States. The following schools joined PTE in 2023: Iona University (Omega), Marquette University (Eta Beta), Presbyterian College (Eta Alpha), Slippery Rock University (Epsilon Omicron), University of Cincinnati (Alpha Lambda), University of Nevada, Las Vegas (Alpha Phi), University of the Pacific (Beta Iota), and Trinity Washington University (Alpha Mu). For a sixth consecutive year, PTE's successful partnership with OccupationalTherapy.com offered free continuing education credits to its active alumni and lifetime members. Thank you to the leadership of PTE officers and engagement of members!

Mary J. Bride First Research Award:

Sarah Synek, OTD, OTR/L, Creighton University

Excellence in Inter-Chapter Collaboration Award:

Duquesne University, Indiana University and University of Texas Medical Branch

President's Award:

Alpha Iota- Creighton University

Research Grant Award:

Elizabeth Williams, Wingate University
Taylor Crum, Alpha Omega chapter at Wingate University
Kaylee Clark, University of Central Arkansas

OVER 50 SCHOLARSHIPS AWARDED

OccupationalTherapy.com Scholarship

Caitlin Horsford – Indiana University Purdue University
McKinley Payne – University of Oklahoma Health Sciences Ctr.

Willard & Spackman Scholarship

Shanice Hamilton - Boston University (Sargent College)
Johnna Belkiewitz - Indiana University

Mary Minglen Scholarship

Laura Gerdts - St. Catherine University

Renee Achter Scholarship

Kasey Bartyzal - University of Minnesota

Mary Will McKenzie Endowed Scholarship

Rachel Fister - Belmont University

The Lela Llorens Endowed Scholarship

Christine Jimenez - Boston University (Sargent College)

The National Board for Certification in Occupational Therapy (NBCOT) Endowed Scholarship

Lauren Bell - University of Illinois at Chicago
Bobbi Dynice - Quinnipiac University
Rachael Class - Cincinnati State Technical and Community College
Tyler LaGuardia - EHOVE Career Center/Lorain County Community College

Lila Daut and Allen Jacobson Occupational Therapy Scholarship

Kyra Neuser - University of Wisconsin – Madison

Carolyn Kohn Memorial Scholarship

Megan Matthews - Russell Sage College

Martha Kirkland Pi Theta Epsilon (PTE) Endowed Scholarship

Kacey Barahona - The Ohio State University
Jennifer Ng - University of Texas Medical Branch

AOTF-STATE OCCUPATIONAL THERAPY ASSOCIATION SCHOLARSHIPS

Adelaid Ryerson Smith Memorial Endowed Scholarship of the

Arizona Occupational Therapy Association

Lauren Fisher – Northern Arizona University

The District of Columbia Occupational Therapy Association Endowed Scholarship

Diarra Simmons - Howard University

The Illinois Occupational Therapy State Association Endowed Scholarship

Thalia Lechuga – North Central College
Kristen Zucco – University of Illinois at Chicago

The Gloria Scammahorn Memorial Endowed Scholarship of the Kansas Occupational Therapy State Association

Jenna Shaw – University of Kansas Medical Center

The Todd Poche Endowed Scholarship of the Louisiana Occupational Therapy Association

Haley Caluda – Louisiana State University Health Science Center

New Jersey Occupational Therapy Association Endowed Scholarship

Tamar Stern - Kean University
Deanna Garofalo - Rutgers University
Joseph Napolitano - Monmouth University

The New York State Occupational Therapy Association Endowed Scholarship

Alexis Muka - D'Youville College
Alex Gross - University of Buffalo

The Jane Davis Rourk Memorial North Carolina Occupational Therapy Association Endowed Scholarship

Jisun Kim – Duke University

Florence M. Stattel Endowed Scholarship

Arianna Cook Sewell- Nova Southeastern University-Tampa

Charles Christiansen and Beth Jones Endowed Scholarship

Kathryn Hiles - University of Texas Health Science Center at San Antonio

Kappa Delta Phi Scholarship

Kiana Shibata - San Jose State University
Melanie Koto - Grand Valley State University

The Robert and Sharon Ryan Endowed Scholarship

Victoria Long - Belmont University

The Linda Botten Endowed Scholarship

Madison Buchys - Salus University

Dian Blicksilver Aja Memorial

Annika Soderfelt - University of St. Augustine-California Campus

Carlotta Welles Scholarship

Millie Medina - Stanbridge University-Los Angeles

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

Kristin Hapke - Creighton University

AOTA ASD Scholarship

Rose Mary Mulholland – Florida Gulf Coast University
Samantha Corbridge – University of Utah

The Ruth Peterson Memorial Endowed Scholarship of the Kappa Chapter of Pi Theta Epsilon

Rachel Koenig – University of North Dakota
Madison Christian – University of North Dakota

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

Francie Bailey – Western Michigan University

Phillip Firehock – Duke University

The Ohio Occupational Therapy Association Endowed Scholarship

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The Oklahoma Occupational Therapy Association Endowed Scholarship

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

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

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Texas Occupational Therapy Association Endowed Scholarship

Ashlie Frederiksen – University of Texas Medical Branch

The Utah Occupational Therapy Association Endowed Scholarship

Tiffanee Matheson – University of Utah
Ofelia Arellano – Salt Lake Community College

The Charlotte Prudich, Elizabeth Devereaux, and Deborah Shamblin Endowed Scholarship of the West Virginia Occupational Therapy Association

Brooke Driscoll – West Virginia University

The Wisconsin Occupational Therapy Association Endowed Scholarship

Sarah Hoffman – Mount Mary University

THANK YOU FOR YOUR SERVICE!

(as of March 1, 2024)

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Open Positions:
Executive Assistant
Communications Coordinator

Welcome:

Emily Felipe joined the Foundation in May 2023 as the Programs Coordinator and was quickly promoted to Scientific & Research Programs Coordinator.

Farewell:

Executive Assistant, Julie Lichtman and Grants Administrators Sylvia Casaro Dietert and Caroline Oke left the Foundation to pursue other endeavors.

FINANCIAL HIGHLIGHTS

Revenues and expenses incurred in supporting our profession through research support and publications, scholarships, development and recognition of leadership, and education. The AOTF is a 501(c)(3) organization, Federal Tax I.D. # 136189382.

The Foundation incurred expense in the following programmatic categories from
October 1, 2022- September 30, 2023.

PROGRAM EXPENSES	2023	2022
Research	\$1,345,224	\$1,432,005
Education	\$546,082	\$520,707
Total Program Services	\$1,891,306	\$1,952,712
SUPPORT SERVICES		
General and Administration	\$803,882	\$731,061
Marketing and Development	\$187,231	\$209,720
Total Support Services	\$991,113	\$940,781
TOTAL EXPENSES	\$2,882,419	\$2,893,493

STATEMENT OF FINANCIAL POSITION SEPTEMBER 30

ASSETS	FY 2023	FY 2022
Cash and Cash Equivalents	\$934,035	\$571,022
Prepaid Expenses and Other Assets	\$26,520	\$19,089
Accounts Receivable	\$17,955	\$18,441
Contributions Receivable	\$678,746	\$1,417,640
Investments	\$31,346,773	\$29,651,044
Right-of-Use-Assets - Operating	\$264,295	\$0
Property and Equipment, Net	\$17,042	\$12,600
TOTAL ASSETS	\$33,285,366	\$31,689,836
LIABILITIES AND NET ASSETS		
CURRENT LIABILITIES		
Accounts Payable and Accrued Expenses	\$308,752	\$89,223
Lease Liability - Operating	\$80,505	\$0
Capital Lease Obligation Total	\$0	\$3,375
Total Current Liabilities	\$389,257	\$92,598
LONG TERM LIABILITIES		
Lease Liability - Operating	\$227,071	\$0
Deferred Rent	\$0	\$57,134
TOTAL LIABILITIES	\$616,328	\$149,732
NET ASSETS		
Unrestricted:		
Undesignated	\$18,245,344	\$17,639,458
Board-designated Quasi-endowment Funds	\$1,961,979	\$1,346,101
Total Unrestricted Net Assets	\$20,207,323	\$18,985,559
Temporarily Restricted	\$3,221,189	\$3,494,829
Permanently Restricted	\$9,240,526	\$9,059,716
Total Net Assets	\$32,669,038	\$31,540,104
TOTAL LIABILITIES AND NET ASSETS	\$33,285,366	\$31,689,836

Copies of the complete audit report prepared by CliftonLarsonAllen, LLP may be obtained by writing to AOTF at 12300 Twinbrook Parkway, Suite 520, Rockville, MD 20852.



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2023 ANNUAL REPORT



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Margaret Leshner	Zoe Mailloux	Paula McNamara
Kimberly Desiree Leverett	Bolanle Majekodunmi	Carol McVey
Gloria Levin	Gretchen Makinson	Ana Teresa Mebune
Paul Levin	Marcia Maltz	Ellyn Medrano
Minna Levine	Ann Mandel	Manjusha Mehra
Catherine LeViseur	Ethel Mandelbaum	Sarah Meinhardt
Danielle Lewicki	Robin Mandell	Emily Mercer
Maureen Leyes	Inti Marazita	David Merlo
Yu Hsiang Liang-Paultre	Michelle Mari	MaryBeth Merryman
Holly Liesegang	Jurgita Marshall	Constance Messier
Lawrence Liff	Mary Martello	Kevin Metro
Kathleen Lind	Gianna Martello	Jayne Meyer
Susan Lingelbach	Brenda Martin	Anand Mhatre
Christine Linkie	Amelia Martin	Stephanie Migliano
Caren Listopadzki	Samantha Martin	Julie Milasich
Amanda Littleton	Jennifer Martin	Mary Milavetz
Beth Littman	Gail Martin	Francine Miles
Chiung-ju Liu	Edmundo Martinez	Peyton Miller
Brittany Livingston	Emily Martini	Jennifer Miller
Scarth Locke	Andrea Mason	Tessa Milman
Preston Lockwood	Lisbeth Mathew	Takeshi Misawa
Stephen Lofy	Jessica Mattheis	Douglas Mitchell
Teresa Lohr	Rachell Maue	Debra Mlotek
Mary Lokken	Lynn Maue	Rebecca Mojica
Ireta London	Mary Maurice	Barbara Mollere Doucet
Katrina Long	Sarah Maxwell	Natalie Monroe
Amy Lorino	Jean May	Dawn Monteiro
Lynn Losada	Elizabeth Mazer	Yvonne Monti
Kathryn Loukas	Kelly Mazur	Amanda Montoney
Cheryl Lucas	April Mazzarelli	Carol Mooney
Whitney Lucas Molitor	Rose McAndrew	Adira Moore
Ellen Lucey	Elizabeth McAnulty	Mia Morales
Gloria Lucker	Victoria McCarley	Sandra Moreira
Susan Ludwig	Barbara Ann McCarrick	Rachel Morgan

Emily Morgan	Hannah Oldenburg	Talia Persaud
Claire Morress	Julie Olearcek	Christine Peters
Rachel Morris	Rachel Oliverio	Jill Peterson
Anne Moscony	Asher Ollivierre	Patricia Peterson
Sherry Muir	Jane Olson	Sarah Phillips
Claire Mulry	Carol Olson	Marcy Phillips
Brian Muni	Laurette Olson	Carmelle Phillips
Bryan Murphy	Arlene Ono	Wendy Phillips
Bailey Murray	Lisa Opielinski	Ashley Phillips
Gayle and Jeffrey Musnikow	Linda Orr	Rebecca Piazza
Kristin Muzzy	Eva Ortega	Ilana Picker
Christine Myers	Kristen Ost	Derek Piggott
Sarah Myers	Barbara Ostrove	Rachel Pigott
Patricia Nagaishi	Virginia Oswald	Gina Pitera
Laura Nagel	Noreen Ouano	Jennifer Pitonyak
Carrie Nakamura	Beth Overturf	Gregg Pitts
Jessica Nakos	Holly Owens	University of Pittsburgh
Christina Nanof	Kimberly Pachik	Samantha Pleasant-Washington
Carol Nathan	Sarah Packard	Kate Poisson
Patricia Nellis	Geraldine Pagaoa-Cruz	Cutting Polakiewicz
Rachel Nelson	Lesley Paige	Jean Polichino
Denise Nepveux	Barbara Palmer	Ellyn Pollard
Katie Ness	Maureen Palmer	Marylee Pontillas
Nicole Netzel	Diane Parham	Sally Poole
Sheri Newsome	Linda Parham	Marie-Christine Potvin
Connie Newton	Sheetal Parikh	Susan Powell
An Nguyen	Melissa Park	Richard Powell
An Nguyen	Lanoris Parker	Theresa Powers
Marta Nibert	Timothy Parks	Virginia Poynton
Shante Nichols-Lockwood	Linda Parocua	Diana Price
Gail Niederman	Mary Alice Partain	Nathanial Pritchard
Sarah Nielsen	Christienne Parten	Rachel Proffitt
Linda Niemeyer	Emily Pasqualetto	Emily Pugh
Dawn Nilsen	Binda Patel-Bell	Tina Pulley
Janet Njelesani	Julie Patterson	Julie Pusey
Cheryl Noda	Julie Paull	Kathleen Pyne
Michael Nolan	Adam Pearson	Nancy Quarrier
Sary Noncent	Megan Peeples	Charles Quick
Dawn Oakley	Cecelia Peine	Julie Quinlivan
Jayme Ober	Samuel Pelligrino Connors	Christine Raber
Sarah Oberle	Kaitlin Pelzer	Samia Rafeedie
Shirley O'Brien	Jean Pennucci	Ketki Raina
Virginia O'Brien	Elaine Penny	Diana Ramsay
Brenda O'Connell	Denise Peralta	Stephanie Ramser
Misao Ogano	Emily Perna	Ric Rasco
Philip Ogunleye	Darci Pernoud	Sharon Rask
Heather O'Keefe	Jennifer Perodeau	Heidi Ratliff
Julie Okon	Amy Perry	Deborah Reber

Ann Redash	Karen Russell-McCaleb	Anne Scott
Darcee Redden	Amy Russell-Yun	Laura Secker
Gretchen Reeves	Ann Russo	Margot Serwer
Carol Regli	Jacquelyn Ryan	Augustus Sese
Khandi Reid	Julia Ryan	Angela Shaffer
Janalee Reineke Lyth	Dawn Ryan	Neha Shah
Timothy Reistetter	Rosemarie Saccomandi	Larisa Shamray
Gail Requardt	Siham Saih	Keren Shavit-Buckley
Linda Resendez	Marcelle Salamy	Chi-Kwan Shea
Loretta Reust	Farida Salhi	Elizabeth Sheather
Amy Reynolds	Sheryl Salvador	Kristen Sheau
Elizabeth Rhodus	Claire Salvini	Cynthia Shechter
Caitlin Rhoten	Jasmin Samaniego	Karyn Shenker-Gould
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Kathryn Riccio	Nancy Samuelson	Elizabeth Shepherd
Kim Rice	Susan Sanders	Kathy Sheppard
Melanie Richardson	Marj Santuff	Stephanie Sheynerman
Erin Richardson	Phyllis Saphra	Brenna Shields
Ann Richardson	Joseph Sardegna	Angela Shierk
Amy Ries	Kazuko Saruwatari	Mary Shotwell
Brandi Ringholz	Harshala Sarwadnya	Jeff Silvernail
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Rebecca Ritter	Kathleen Saunders	Gaylene Simmons
Sarah Roberts	Michelle Savrann	Phyllis Simon
Christine Roberts	Lauren Sayoc	Connie Simon
David Robertson	Annmarie Scalise-Kinsella	Stacy Simoneaux
Catherine Robinson	Annette Schaefer	Robin Simpson
Marquita Robinson-Altman	Carol Scheerer	Matthew Simpson
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Juleen Rodakowski	Barbara Schell	Johnny Singleton
Sarah Rodenburg	Jessica Schlosser	Angelita Siojo-Allen
Ashley Rodriguez	Gretchen Schmalz	Justin Sisson
Michelle Rodriguez	Laura Schmeiser	Molly Sleigh
Marco Rodriguez	Arlene Schmid	Natasha Smet
Sandra Rogers	DeAnne Schmunk	Margaret Smith
Charles Rogers	Sarah Schoen	Stacy Smith
Kara Rogers	Caren Schranz	Jerilyn Smith
Leslie Rognstad	Judith Schrepfer	Cristina Smith
Marjorie Rojas	Kali Schrey	Dawn Smith
Susanne Roley	Connie Schroeder	Ute Smith
Kim Rose	Kelly Schrubba	Michael Smith
Abbey Rosen	Trina Schulz	Cheyenne Smith
Gail Rosenberg	Theresa Schuster	Jessica Smith
Denise Rotert	Nicole Schwam	Teepa Snow
Jan Rowe	Jeannette Schwartz	Jo Solet
Aurora Rowland	Kari Schwarzwalter	Amy Solomon
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Linda Rudd	Jennifer Sciacca	Diane Specht

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Karen Speicher	Corwin Sutherin	Laura Turnbull
Emma Spencer	Elise Sutton	Bailey Tyler
Shoshana Spiegel	Lynne Swedberg	Quinn Tyminski
Stephanie Spinelli	Abigail Swidergal	Marilyn Tyre
Susan Spitzer	Judy Taft	Sophia Uehara
Carol Spizman	Sheree Talkington	Amy Ukleja
Susan Spoeri	Elaine Tam	Angela Umbarger
Abigail Spor	Marbea Tamaro	Stanbridge University
Alice Sporleder	Tiffany Tang	Carolyn Unsworth
Carolyn Sprehe	William Tarleton	Christine Urish
Cathleen St. Dennis	Louie-Jean Taylor	Amy Utecht
Olivia St. Martin	Teresa Teague	Karon Uzzell-Baggett
Danielle St. Victor	Yvette Tebo	Jantje Van Der Molen
Kathleen Stachowski	Sivan Tehila	Caleigh Van der Veer
Lucile Stangel	Lindsey Telg	Stephen Van Lew
Holly Stants	Lisa Tellem	Laura VanPuybrouck
Laurie Steen	Orley Templeton	Angie Vasser
Ashley Stefka	Dianne Tennant-Rucker	Jaime Vehovsky
Nicole Steingraber	Courtney Tesch	Tripta Velamoor
Jaclyn Stephens	Yvonne Teske	Craig Velozo
Annie Stepka	Elizabeth Thiers	Saraswathy Venkataraman
Sharon Sterling	Amy Thomas	Marybeth Ventorini-Burkett
Brocha Stern	Lauren Thomas	Rose Versace
Erica Stern	Traci Thomas	Jennifer Villar Guerin
Sue Stevens	Jinu Thomas	Arlene Villarin
Thomas Stevens	Ryan Thomas	Kirsta Von Hellens
Crosby Stevens	Angela Thomas-Davis	Alexandra Wagner
Edith Stewart	Amy Thompson	Thelma Wakefield
Amanda Stilianos	Skye Thompson	Lorraine Walczyk
Darcelle Stillman	Joyama Thomson	Amiya Waldman-Levi
Whitney Stippler	Lena Thoresen	Constance Wall
Sharon Stoffel	Linda Tickle-Degnen	Nancy Wallace
Carolyn Stoller	Helen Tilson	Shelley Wallock
Kelly Stone	Dennis Tobin	Toni Walski
Erin Stone	Julie Toenies	Deborah Waltermire
Sandra Stoppel	Michelle Tompkins	Karen Walters
Chelsey Storlie	Janice Tona	Chaye Warburg
Sonia Story	Elizabeth Torcivia	Randa Warner
Nicole Stotz	Patricia Tornabene	Elizabeth Warnken
Valerie Strange	Jacqueline Torossian	Madison Warren
Chad Strowmatt	Pamela Toto	Jennifer Washko
Linda Struckmeyer	Karen Travis	Renee Watling
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Christie Stuber	Anne Trecker	Marit Watson
Michelle Suarez	Reema Trivedi	Amy Watson-Grace
Jason Suda	Abby Tropiano	Kelsey Watters
Beth Sullivan	Joseph Troudt	Jennifer Weaver

Cara Weaver
Lindy Weaver
Michelle Webb
Kristen Webber
Anna Weber
Brie Weisman
Shari and Ira Weissman
Joseph Wells
Andrew Welsh
Diane Wenger
Seth Werlin
Shirley Werth
Sylvia West
Pauline Westcott
Blythe Westendorf
Eileen Westholz
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Mirtha Whaley
Cynthia Wheeler
Tera White
Shannon White
Teresa Wickboldt
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Victoria Wilburn
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Sarah Wilkin Gibart
Laura Wilkinson
Kimberly Wilkinson
Megan Willard
Lisa Willey
Ethan Williams
Pamela Williams
Lisa Williams
Jane Willis
Caleb Wilson
Tracy Wilson
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Kjirsten Winters
Cecilia Wirth
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Jennifer Womack
Alicia Womack
Jessica Wood
Amy Woods
Lorraine Woody

Jamie Wronka
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Jenna Yeager
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