



THE AMERICAN  
OCCUPATIONAL THERAPY  
FOUNDATION

Building Evidence to Improve Practice & Health<sup>®</sup>

# 2024 ANNUAL REPORT

ENGAGING COMMUNITY PARTNERS



# FROM OUR CHAIR

Dear Friends, Partners, and Colleagues,

Greetings! As the incoming chair of the AOTF Board of Trustees, I share gratitude, hope, and excitement for the outstanding accomplishments in advancing the exemplary research supporting the occupational therapy profession. AOTF continues to make great strides in supporting and promoting occupational therapy research through funding grant programs, increasing the public understanding of the importance of occupations and wellbeing, and publishing the quarterly journal *OTJR: Occupational Therapy Journal of Research*.



A recent research initiative by AOTF is creating and commencing activities to support community-engaged research. This plan culminated with the inaugural AOTF Engage Summit in the Fall of 2024, which CEO Campbell discusses in his letter. To continue supporting community-engaged research, AOTF is launching a new grant program for community-engaged research in Spring 2025. This new grant is made possible by funding support from the National Board for Certification in Occupational Therapy (NBCOT®). AOTF is committed to supporting community-engaged research through the new grant program and the Engage Summit.

In conclusion, I want to acknowledge Dr. Mary Jane (MJ) Mulcahey, who not only served her four-year term with distinction but also volunteered for a fifth year to facilitate a smooth transition to new leadership on the Board. Under Dr. Mulcahey's leadership in the past four years, AOTF has made significant progress in overcoming the challenging years and uncertainty caused by the COVID-19 pandemic. In addition, under her leadership, AOTF developed and implemented a rigorous strategic plan, propelling AOTF forward to seize future opportunities. I personally thank MJ for her mentorship and graciousness. I also want to recognize all our volunteers on the committees and Board for their tireless commitment and our AOTF staff for their guidance. I look forward to partnering with all of you over the next three years to continue supporting and building capacity for the science of occupational therapy.

**Patricia (Patti) Davies, PhD, OTR/L, FAOTA**  
AOTF Board Chair

# FROM OUR CEO

## THE POWER OF COMMUNITY

Over the course of the Foundation's current three-year strategic plan, we have endeavored to better connect OT researchers to the practice community. Equally important, however, is the connection between OT researchers and the communities in which the research happens. Noted Cleveland Clinic physician and author Mark Hyman has said, "The power of community to create health is far greater than any physician, clinic or hospital." During the past year, the Foundation has emphasized authentic community-engaged research. While there are many definitions of community-engaged research, the one provided by Duke University Medical Center's Clinical and Translational Science Institute is a good one. "Community engagement is the process of working collaboratively with and through groups of people affiliated by geographic proximity, special interest, or similar situations to address issues affecting the wellbeing of those people. It is a powerful vehicle for bringing about environmental and behavioral changes to improve the community's and its members' health." The voices and ideas of the community must be heard, respected, and valued during the entire research process.



In 2024, the Foundation hosted its inaugural AOTF Engage Summit, thanks to the support of the National Board for Certification in Occupational Therapy (NBCOT®). This groundbreaking event brought together passionate occupational therapy researchers and community partners to elevate and build capacity in community-engaged OT research. There were 111 attendees, 69 researchers/clinicians/practitioners, and 42 community partners (36 community partners receiving travel stipends to be able to attend). The event showcased the depth and breadth of high-quality community-engaged research within occupational therapy. It also identified and evaluated systematic approaches to community engagement, including evaluation, measurement, outcomes, and dissemination. The Foundation will host this event every two years going forward.

In her letter, Chair Davies shares a few other community-engaged efforts by the Foundation. To advance the Foundation's mission, the Foundation and its volunteers and donors, as well as the OT research, OT practice, and lay communities, must work together "to support people's full participation in meaningful life activities."

**Scott Campbell, PhD**  
AOTF CEO

# FORGING AHEAD: RESEARCH AND SCIENTIFIC PROGRAMS

In 2024, the Foundation continued to advance the science of occupational therapy (OT) through its various strategic initiatives, including adding new funding opportunities and forming new relationships to fill the gaps and foster stronger connection between occupational therapy practitioners and research. This was in addition to several programs, including research grants, scholarships, fellowships, awards, publications (through AOTF's journal *OTJR*), presentations at various OT and non-OT events, student leadership activities, and others that the Foundation has already taken a lead on.

Over the years, the funding programs have continued to lay the groundwork for the Foundation's mission and vision.

## GRANT PROGRAM

In 2024, we reached the twelfth year of continuous funding for our **Intervention Research Grant (IRG)** program. With one new recipient, the total IRG funding is \$50,000 for 2024 (release of funds pending). The IRG program would not be possible without the support of the American Occupational Therapy Association (AOTA) and the NBCOT®. We also extend a big thank you to the hundreds of students who supported the program through the annual AOTF St. Catherine's Challenge.

In its sixth year, the **Health Service Research (HSR) Grant** 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 in 2024, the total HSR funding is \$200,000 for 2024.

Entering its fifth year, the **Implementation Research (IR) Grant** program, 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 in 2024, the total IR funding is \$299,000. We thank NBCOT® for providing the funding to initiate and sustain this program.

Over the years, several of the past grant recipients have received follow-on federal/non-federal grant funding and have made a significant impact, not only in the field of OT but also in patient care, using the outcomes of their research work funded by the AOTF grants. With the support of our partners, donors, and all the hardworking occupational therapist practitioners, we look forward to continuing this work in 2025.

## INTERVENTION RESEARCH GRANT RECIPIENT

**Emily Grattan, PhD, OTR/L**  
**University of Pittsburgh**

Examining Metacognitive Strategy Training for Individuals with Unilateral Spatial Neglect  
(Mentor: Elizabeth Skidmore, PhD, OTR/L, FAOTA, FACRM)

## HEALTH SERVICES RESEARCH GRANT RECIPIENTS

**Adam Kinney, PhD, OTR/L**  
**University of Colorado**

Inequitable Access to Occupational Therapy Services among Veterans with Traumatic Brain Injury and Cognitive Impairment  
(Mentor: Nazanin Bahraini, PhD)

**Sabrin Rizk, PhD, OTR/L**  
**University of Illinois in Chicago**

Utilizing Electronic Health Records (EHR) for the Surveillance of Referral-Making Processes in Medical Home Primary Care for Children and Youth on the Autism Spectrum (CYAS)  
(Mentor: Teal Benevides, PhD, MS, OTR/L, FAOTA)

## IMPLEMENTATION RESEARCH GRANT RECIPIENTS

**Areum Han, PhD, OTR/L**  
**University of Alabama at Birmingham**

Implementing an Occupational Therapist-Led Acceptance and Commitment Training Group for Parents in Pediatric Outpatient Clinics  
(Mentor: Hee Yun Lee, PhD)

**Laura Swink, PhD, OTR/L**  
**Colorado State University**

Social Prescription for Loneliness in Community-Based Group Exercise Classes for People with Parkinson Disease  
(Mentor: Cory Christiansen, PT, PhD)

**Lauren Wengerd, PhD, OTR/L**  
**The Ohio State University**

Identifying Evidence-Based Practice Gaps in Stroke Rehabilitation to Maximize Research Impact: A Video Observational Study  
(Mentor: Timothy J. Wolf, OTD, PhD, OTR/L, FAOTA)

## 2024 SCHOLARSHIPS AND FELLOWSHIPS

Thanks to generous donors, AOTF invests in and recognizes exceptional OT research scientists early in their careers, funding doctoral students/candidates and postdoctoral researchers. We believe that the future of OT research is embedded in developing a research workforce capable of building new evidence to inform everyday practice and improve health. In line with this, the Foundation introduced the new **Dr. A. Jean Ayres Occupational Therapy Doctoral Candidate Research Scholarship** in the 2024 funding cycle (funds will be disbursed in 2025).

The AOTF celebrates the recipients of Scholarships and Fellowships for 2024:

### DR. GARY KIELHOFNER DOCTORAL STUDENT SCHOLARSHIP

**Cristina Parsons, MOT, OTR/L**  
**Colorado State University**

Inclusion of Young Adults with Intellectual Disabilities in Their Transition to Employment: Designing the Vocational Fit Assessment – Self Report  
(Mentor: Andrew Persch, PhD, OTR/L, BCP, FAOTA)

### BONITA KRAFT DOCTORAL STUDENT SCHOLARSHIP

**Samantha Randolph, MA, OTR/L**  
**Washington University School of Medicine in St. Louis**

Toward an Understanding of Loneliness and Social Participation in Serious Mental Illness  
(Mentor: Lisa Tabor Connor, PhD, MSOT, OTR/L)

### NEDRA GILLETTE ENDOWED RESEARCH FELLOWSHIP

**Jaewon Kang, PhD, MSOT**  
**University of Illinois Urbana-Champaign**

Development of an Instructional Manual for Conducting Remote Home Assessments for Individuals Living with Spinal Cord Injuries  
(Mentor: Laura A. Rice, PhD, MPT, ATP)

### NANCY TALBOT POSTDOCTORAL RESEARCH FELLOWSHIP

**Lindsay Spell, OTD, OTR/L**  
**Washington University School of Medicine in St. Louis**

Asthma Home Occupation-Based Modified Environmental Assessment (HOME): A Pilot Study  
(Mentor: Kelly M. Harris, PhD, CCC-SLP)

## MENTORSHIP AND TRAINING FUNDS

### STRIDE MENTORED RESEARCH SCHOLARSHIP (SMRS)

In 2024, 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 Mentored Research Scholarship (SMRS) recipients in 2022, five in 2023, and another five in 2024, a total amount of \$127,000 has been awarded. The final presentation for the SMRS recipients 2023 was a poster presentation at the AOTA conference of 2024 to showcase the SMRS experience to a wider audience and, in doing so, ensure the promotion of OT research careers among underrepresented groups.

The STRIDE Mentored Research Scholarship Recipients for 2024 are:

**Jerelyne Idica, OTR/L, CHES, ECHM**  
**Brooks Rehabilitation**

Building Research Skills and Competency Through Study of Hospital Readmissions  
(Mentor: Chiung-Ju Liu, PhD, OTR/L, FGSA)

**Janelis Rodríguez, MS, OTR/L**  
**American International College**

Assessing Quality of Life and Community Intervention for Migrant Individuals and Families  
(Mentor: Mansha Mirza, PhD, OTR/L)

**Michele Andrianna Cary, CScD, MPH, MTS, OTR/L**  
**AM Healthcare Professional Consultants, LLC**

Implementation Strategies for Preventing Maternal Mortality for African American Mothers  
(Mentor: Elizabeth Rhodus, PhD, MS, OTR/L)

**Briana Elson, MS, OTR/L, BCPR, CBIS**  
**Brooks Rehabilitation**

Independence Day: Inpatient Rehab facilities (IRF) to Home Transition  
(Mentor: Susan Stark, PhD, OTR/L, FAOTA)

**Valencia Steele, PP-OTD, OTR/L**  
**Columbia University College of Physicians and Surgeons**

"Show me the FACTS" (Functional Assessment of Adolescents Cognitive Skills): Evaluating the Goal-Directed and Life Performance of Neurodiverse Youth  
(Mentor: Dorothy Edwards, PhD)

### THE DR. CAROLYN BAUM COGNITIVE FUNCTION IN DAILY LIFE MENTOR AWARD

In 2024, AOTF launched The Dr. Carolyn Baum Cognitive Function in Daily Life Mentor Award to support functional cognition research by OT scientists and build research capacity in this area. The award funds a scientist to mentor a trainee in functional cognition research.

## RESEARCH RESOURCES

This past year, we continued to update our comprehensive Research Resources on the AOTF website. It features several useful tools and resources to assist occupational therapy students, practitioners, and researchers with their research journey, regardless of stage. Additionally, our Dissemination Toolkits feature a variety of publicly available, free-to-download resources that can help facilitate the uptake and translation of research into practice.

## ENGAGEMENT AND SCIENTIFIC PARTNERSHIPS

In 2024, the Foundation continued to support OT research through engaging new partners and building relationships. Some of these partnerships include the following:

### TRAINING IN DIVERSITY EDUCATION PROGRAM

AOTF has partnered with the R25 grant funded 'Training in Diversity education' or TiDe program. TiDe educates current rehabilitation clinician scientists in the skills and knowledge needed to recruit, train, and support research trainees from populations underrepresented in biomedical science, with the plan that these clinician scientists will support the next generation of diverse clinician scientists with the capacity to advance rehabilitation research.

In 2024, TiDe expanded its outreach to recruit qualified rehabilitation scientist faculty and diverse occupational therapy graduate students nationwide. It has two cohorts with 10 faculty-student trainee dyads representing 14 occupational and physical therapy programs from the East to the West Coast and Hawaii. Additionally, the program not only held its second annual workshop that featured research from Cohort one dyads and introductions to Cohort two dyads but also launched a webinar series to support dyad and pod development.

### OT SUMMIT

The 2024 Annual OT Summit, held in Florida in June, was a pivotal event for advancing occupational therapy research, fostering collaboration among leading universities. Tailored for career scientists at all stages, the Summit featured presentations from numerous AOTF grantees, awardees, and affiliates. AOTF's presence was strong, with CEO Scott Campbell, PhD, and Chief Scientific Officer Satvika Garg, PhD, OTR/L, highlighting the organization's role in OT research. Summit abstracts will be published in a forthcoming issue of *OTJR*.

### OT STATE ASSOCIATIONS

AOTF collaborated with several OT associations nationwide to strengthen the partnerships between clinicians and researchers. A prime example was at our local Maryland Occupational Therapy Association (MOTA)



Connecting at MOTA: AOTF Scientific & Research Team and funded researchers

Conference in November at Towson University, our Scientific & Research Programs Coordinator's alma mater. Several AOTF funding and award recipients participated in an engaging panel review to share research resources and funding opportunities that AOTF provides at various career stages, educate the audience on practical strategies for accessing and applying evidence-based practice (EBP) and define the unique roles and contributions of AOTF & AOTA in the OT community.

### WORKSHOP IN IMPLEMENTATION SCIENCE AND HEALTH SERVICES

The first two Workshops in Implementation Science and Health Services (WISH): Advancing Grant Writing Skills for Rehabilitation Researchers occurred in May 2022 and 2023. AOTF is excited to co-sponsor the WISH Grant Writing Skills for Rehabilitation Researchers for the third consecutive year, alongside CoHSTAR and LeaRRn, in 2025!

The Foundation's partnerships and donors invest in OT scientists through grants, scholarships, fellowships and other programs. We thank them for their generous donations and funding, and our research review committees for their expertise and time!

## DISSEMINATING RESEARCH WITH OTJR

2024 has been a year of continued growth and innovative change for our quarterly research publication *OTJR*: *Occupational Therapy Journal of Research*.

The 2023 Impact Factor is 1.5, and the 5-year Impact Factor is 1.8. 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 and invited commentaries.

In July 2024 we published a focused issue on the Person-Environment-Occupation Performance Model and called for papers for the 2025 Special Edition on Community-Engaged 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, PhD, OTD, 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.



**Ganesh M. Babulal, PhD, OTD, MSCI, MOT, OTR/L**

Associate Professor (Tenured)  
Department of Neurology,  
Washington University School of  
Medicine  
St. Louis, Missouri

Dr. Babulal's research interests reside in investigating the relationship between cognition and mental health and its impact on instrumental activities of daily living in healthy older adults and those with chronic neurological diseases.

His funded studies focus on using biomarkers to track functional changes, predicting cognitive decline, identifying noncognitive disease markers, and examining mental health's impact on brain function. As his research evolved, its progression grew from structural and social determinants of health (SSDOH) and health disparities while addressing the translational gap. This work has scaled up to now examine how upstream SSDOH factors impact adverse health outcomes in on vulnerable populations in the U.S. and globally.



**Lindy Clemson, PhD, MAppSc, BAppSc, Dip OT, FOTARA**

Emeritus Professor  
Faculty of Medicine and Health  
The University of Sydney  
Sydney, Australia

Professor Emeritus Lindy Clemson is a specialist in public health research on aging and an occupational therapist with a PhD in epidemiology. She has led research and advocacy internationally for best practices in in-home evaluation and fall prevention using environmental and enablement strategies. Her research has transformed approaches to fall prevention and provided new approaches and strategies to occupational therapy, medical practitioners, and a lay audience.

This work positively impacts the lives of countless older people around the world. Clemson's contributions have been recognized by national and international entities, including being elected as an inaugural fellow of the Australian Occupational Therapy Research Academy, reflecting her exemplary, distinguished, and sustained contributions to the science of occupational therapy.



**Roberta (Bobbi) Gittens Pineda, PhD, OTR/L, CNT**

Assistant Professor (Tenured)  
Mrs. T.H. Chan, Division of  
Occupational Science and  
Occupational Therapy  
Herman Ostrow School of Dentistry  
University of Southern California  
Los Angeles, California

Dr. Roberta Pineda is a tenured Associate Professor and Director of the NICU Laboratory within the Chan Division of Occupational Science and Occupational Therapy at the University of Southern California. She is also a founder and co-chair of the Neonatal Therapy Certification Board. Dr. Pineda's research explores factors affecting preterm infant development to improve neurodevelopmental outcomes. Over the past decade, she has secured \$7 million in grants to develop innovative NICU programs, assessments, and products. Her work includes a multimodal sensory exposure program, a standardized neonatal feeding measure, a bottle technology for paced feeding, and a community program improving NICU-to-home transitions, especially for underserved populations.



**GRADUATE STUDENT/CLINICIAN  
OT STUDENT**

**EDUCATIONAL  
SCHOLARSHIPS**

Post-Baccalaureate,  
Associate, State  
Scholarships

Pi Theta Epsilon  
(PTE) Awards

**MENTORSHIP &  
TRAINING FUNDS**

The Dr. Carolyn Baum  
Cognitive Function in Daily  
Life Mentor Award

STRIDE Research  
Scholarship

**DOCTORAL  
CANDIDATE**

**RESEARCH  
SCHOLARSHIPS**

Dr. Gary Kielhofner  
Research Scholarship in OT

Bonita Kraft OT Doctoral  
Student Scholarship

Dr. A. Jean Ayres Doctoral  
Candidate Scholarship

**POSTDOCTORAL  
RESEARCHER**

**FELLOWSHIPS**

Nedra Gillette Endowed  
Research Fellowship

Nancy Talbot Postdoctoral  
Research Fellowship

**OT FACULTY/EARLY  
CAREER RESEARCHER**

**GRANTS**

Intervention  
Research Grant

Implementation  
Research Grant

# AOTA INSPIRE 2024: FUN IN FLORIDA!

We had a great time at the AOTA INSPIRE 2024 Conference and Expo in Orlando! Thanks to attendees, speakers, donors, sponsors, volunteers, and staff for supporting OT research at the Conference and all year round!

#AOTFoundationFriday included our signature events, Breakfast with a Scholar, Research Excellence Symposium, State of the Science Symposium, and kick-off of the two-day AOTF/AOTA Institute for Future OT Scientists.

Congratulations to all our 2024 AOTF Award Recipients and AOTA Award Recipients, including **Karen Jacobs, EdD, OTR/L, CPE, FAOTA**, who received the AOTF/AOTA Presidents' Award in honor of Wilma L. West and **Roseann Cianciulli Schaaf, PhD, OTR, FAOTA**, who received the Eleanor Slagle Clarke Lecture Award. Plus, a big shout-out to the roster of fellows, which includes several AOTF Grant Recipients, Current and Past Board Members, Volunteers, and other Supporters of the Foundation.

To many of us, our colleague Lands Banks was there in spirit; we were glad to partner with AOTA to honor his memory through the Lands Banks Memorial Scholarship.

## FUTURE SCIENTISTS

A cohort of entry-level OT students participated in the AOTF/AOTA Future Scientists Institute in Orlando, Florida.

The facilitators and mentors included faculty and doctoral/postdoctoral students from established research programs nationwide. 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 scientists.

The participants were also invited to our Breakfast with a Scholar, State of the Science and Research Excellence programs, AOTA's Presidential Address, and the Eleanor Slagle Lecture by **Anita Bundy, ScD, OT/L, FAOTA, FOTARA**, AOTF Academy of Research Member.



Applauding OT leadership



Networking with AOTF



Exploring the newest advancements in OT science



Mentoring Future Scientists



*A vibrant session underway at our first Engage Summit*



*Building connections at the World Café*



*Bringing research to life through poster presentations*

# THE INAUGURAL AOTF ENGAGE SUMMIT: ADVANCING COMMUNITY-ENGAGED OT RESEARCH

On October 10–11, 2024, AOTF hosted its first-ever Engage Summit in Alexandria, Virginia. This landmark event, sponsored by the NBCOT®, brought together over 100 occupational therapy researchers and community partners to advance community-engaged OT research. Co-chaired by **Susan Magasi, PhD, MS, BScO, BSc, FACRM**, from the University of Illinois Chicago, and **Jessica M. Kramer, PhD, OTR/L**, from the University of Florida, the Summit focused on building capacity and fostering collaboration within the profession.

The Engage Summit featured dynamic panels and discussions addressing key topics:

- Community engagement across all phases of research
- Infrastructure development to support research initiatives
- Evaluating processes and outcomes to ensure meaningful impact

Attendees also participated in partnership showcases and poster sessions, providing valuable networking and knowledge-sharing opportunities.

Keynote speakers included:

- **Karriem Watson, DHSc, MS, MPH**, explored the NIH *All of Us* Research Program’s potential to address disability health disparities.
- **Angel Love Miles, PhD**, emphasized the importance of community participatory research in occupational therapy.

This event strongly emphasized diversity, equity, and inclusion (DEI) by engaging underrepresented communities and empowering individuals with lived experience to contribute as equal partners in research.

The event concluded with a World Café session, paving the way for future progress, including developing a white paper and an *OTJR* manuscript to synthesize the key insights and discussions.

# THANK YOU TO OUR 2024 SPONSORS

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Dr. Lynne Richard,  
PhD, OT/L, FAOTA

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Barbara Winthrop, MA, OTR, CHT, FAOTA  
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## STATE OF THE SCIENCE

### VANGUARD



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Barbara Winthrop,  
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Piller Child Development

### EXPLORER

University of Missouri

# THE POWER OF PHILANTHROPY IN OCCUPATIONAL THERAPY

At the heart of occupational therapy is heart! For over 100 years, our profession has uniquely provided healthcare through a holistic approach that engages a person's physical, mental, and emotional attributes to help them participate in the activities they want and need to do. Occupational therapy is a profession of passion and compassion.

What has significantly advanced our practice and made the greatest impact on delivering high-quality care is scientifically based evidence generated through OT research. Today, with the growing demand for occupational therapy services from a population that is increasing in size, age, diversity, and abilities, we need substantial, current, and inclusive evidence.

AOTF is advancing the science of occupational therapy. By addressing critical gaps in the research landscape and making targeted investments, AOTF builds new evidence and expands research capacity. To meet the needs of clients and caregivers and the demands of payers and policymakers, occupational therapists must have access to the best evidence, and AOTF ensures they do.

Your philanthropy is vital. AOTF provides the seed funding necessary for early-stage OT research studies, enabling innovative ideas to take shape. Through multiple grant programs spanning diverse topics and supporting a wide range of researchers, clinicians, students, and community partners, AOTF is addressing our profession's evidence-based needs.

These investments, whether in research grants, training and mentorship, scholarships for OT students, or educational sessions and resources, are only possible because of the generosity of donors like you. AOTF's work is essential to advancing OT science, supporting practitioners, and improving the lives of those they serve.

The future of occupational therapy science is in our hands. By supporting AOTF, an independent, nonprofit organization, you help empower practice, drive research, and transform lives. Together, we can make a meaningful impact.



# THANK YOU DONORS!

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Jeffrey Crabtree  
Amanda Craig  
Elizabeth Crepeau  
Timothy Cyr  
Collese Daley  
Elin Davis  
Evan Dean  
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Emily Eddy  
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Peter Fayard  
Ashley Fernandez

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Cameron Smith  
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Jordan Amato  
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Lisa Andersen  
Emily Anderson  
Pamela Anderson  
Lynne Andonian  
Janah Angelou  
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Lourdes Arellano  
Olivia Ariens  
Stephanie Armstrong  
Amy Armstrong-Heimsoth  
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Deborah Austin	Kathleen Boas	Julie Capello	Laura Collins	Jean Deitz
Sandra Austin	Janna Boettcher	Paula Carey	Lara Collins-Barros	Ronna DeKoven
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Patricia Parden	Julie Pusey	Jan Rowe	Nicole Schwam	Magda Sosa-Gwosdz
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Victoria Payne	Susan Rapsis	Rosemarie Saccomandi </td <td>Veronica Seung Mun Lee</td> <td>Cheryl Stair</td>	Veronica Seung Mun Lee	Cheryl Stair
Deanna Peabody	Ric Rasco	Lisa Sakemiller	Angela Shaffer	Alina Stanczak
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Judy Taft	Gumaro Tovar	Amanda Walker	Renate Williamson	Audrey Zapletal
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Alison Taylor	Dianna Ullrich	Michele Watson	Darii Wohlers	
	Carolyn Unsworth	Amy Watson-Grace	Laurie Wolf	

# SUPPORTING THE INTERVENTION RESEARCH GRANT

The 2024 St. Catherine Challenge was a great success, with 66 schools raising more than \$57,000 to support the AOTF Intervention Research Grant (IRG) program. This national, student-led fundraiser provides essential funds for the IRG program. The Challenge has fully funded an annual IRG since 2017, and over the last 10 years, it has raised more than \$500,000 for OT research!

IRGs fill a critical gap in OT research funding by providing financial support for early-stage studies to collect pilot data and build proof of concept. Since 2014, AOTF has funded 50 studies in 28 states covering more than two dozen topics! Every year, the IRG program is made possible solely thanks to the philanthropic generosity of our community of donors, many of whom support both OT research and their schools through the St. Catherine Challenge.

Complete results of the Challenge were posted at our 2024 AOTA Inspire Conference booth; top school teams were invited to both AOTF's Breakfast with a Scholar and State of the Science events, where they received the awards and took a group picture with the Breakfast with a Scholar speaker.

## TOP FUNDRAISING SCHOOLS:

**1<sup>st</sup> Place** - University of Southern California

**2<sup>nd</sup> Place** - Marquette University

**3<sup>rd</sup> Place** - St. Catherine University

**MVP** - Marquette University

**Rush to the Top** - Temple University



Celebrating success! Our 2024 St. Catherine Challenge winners

# PTE SHINES AND GROWS

In 2024, Pi Theta Epsilon (PTE), the honor society for occupational therapy students and alumni expanded its reach with the addition of four new chapters: Midwestern University (Beta Epsilon), Rutgers University (Beta Eta), Cedar Crest College (Beta Lambda), and Notre Dame of Maryland University (Delta Zeta). All 147 chapters will provide a major boost to occupational therapy.



UNE PTE Induction Ceremony: Honoring the dedication and commitment of our newest professionals.

## President's Award

Alpha Iota chapter at Creighton University

## Excellence in Inter-Chapter Collaboration

Beta Theta chapter at Duquesne University

Iota chapter at Indiana University

Nu chapter at the University of Texas Medical Branch

## Research Grant Award

**Elizabeth Williams**, Alpha Omega chapter at Wingate University

**Taylor Crum**, Alpha Omega chapter at Wingate University

**Kaylee Clark**, Gamma Iota chapter at the University of Central Arkansas

## Mary J. Bridle Award

**Sarah Synek**, Alpha Iota chapter at Creighton University

# OVER 65 SCHOLARSHIPS AWARDED

## **OccupationalTherapy.com Scholarship**

Gabriella Johnson, University of Texas Medical Branch-Galveston  
Stephanie Magana, University of Southern California

## **Willard & Spackman Scholarship**

Eugenie Planche, Boston University  
Sarah Rabitoy, Keck Graduate Institute

## **The National Board for Certification in Occupational Therapy Endowed Scholarship**

Shanmin Sultana, Wayne State University  
Marissa Heirich, Dominican University  
Leslie Rognstad, Houston Community College  
Noa Szylakowski, Lorain County Community College

## **Mary Minglen Memorial Scholarship**

Christen Stefanelli, University of Pittsburgh

## **Renee Achter Scholarship**

Helen Saul, Cleveland State University

## **The Lela Llorens Endowed Scholarship**

Alice Lee, MGH Institute of Health Professionals

## **Carolyn Kohn Memorial Scholarship**

Marion Dela Pena, State University of New York Downstate Medical Center

## **Martha Kirkland Pi Theta Epsilon Endowed Scholarship**

Sara Mathai, Thomas Jefferson University  
Megan Rush, University of Mississippi Medical Center

## **The Florence M. Stattel Endowed Scholarship**

McKinley Alden, Nova Southeastern University – Ft. Lauderdale

## **Mary Will McKenzie Endowed Scholarship**

Meagan Sandwith, University of St. Augustine Health Sciences

## **Charles Christiansen and Beth Jones Endowed Scholarship**

Alison Xi, MGH Institute of Health Professionals

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

Rocío Rojas, University of New Mexico HSC

## **Kappa Delta Phi Scholarship**

Kiersten Smith, West Virginia University  
Skylar Trezona, San Jose State University

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

Karin Johnson, University of Washington School of Medicine

## **The Robert and Sharon Ryan Endowed Scholarship**

Madeline Blackbourn, St. Ambrose University

## **The Linda Botten Endowed Scholarship**

Amber Nipper, University of Florida

## **Diane Blicksilver Aja Memorial Scholarship**

Ava Murchison, Wingate University

## **Carlotta Welles Scholarship**

Maygen Smith, San Jacinto College

## **AOTF-STATE OCCUPATIONAL THERAPY ASSOCIATION SCHOLARSHIPS**

### **Adelaid Ryerson Smith Memorial Endowed Scholarship of the Arizona Occupational Therapy Association**

Jordan Swarztrauber, Northern Arizona State University  
Kailee Sullivan, Northern Arizona State

### **The District of Columbia Occupational Therapy Association Endowed Scholarship**

Alicia Alleyne, Trinity University of Washington  
Taylor Ross, Howard University

### **Florida – The Myra McDaniel Endowed Scholarship**

Amber Nipper, University of Florida

### **Illinois Occupational Therapy Association Endowed Scholarship**

Ari Buslovich, University of Illinois-Chicago  
Courtney Bland, Midwestern University-Downers Grove Campus

### **Kansas – Gloria Scammahorn Memorial Endowed Scholarship**

Paige Becker, University of Kansas Medical Center

### **Louisiana – The Todd Poche Endowed Scholarship**

Julia Reggio, Louisiana State University – HSC-New Orleans

### **Massachusetts – The Karen Jacobs Scholarship**

Eugenie Planche, Boston University  
Jillian Salis, MGH Institute of Health Professionals

### **Michigan – The Fred Sammons and Barbara Rider Endowed Scholarship**

Shanmin Sultana, Wayne State University

### **New Hampshire – The Mary Eileen Dixey Endowed Scholarship**

Kate English, Massachusetts College of Pharmacy and Health Science, Hanover Campus

## **New Jersey Occupational Therapy Association Endowed Scholarship**

Lauren Ettore, Thomas Jefferson University  
Ashley Choi, Rutgers University

## **New Mexico – The Julia Sweeny Endowed Scholarship**

Rocio Rojas, University of New Mexico  
Mandy Schaffer, University of New Mexico

## **New York State Occupational Therapy Association Endowed Scholarship**

Marion Dela Pena, State University of New York Downstate  
Sydney Zelin, Stony Brook University  
Nadine Johnson, State University of New York Downstate  
Olivia Izenwasser, Stony Brook University  
Meagan Kearney, Stony Brook University  
Laura LaCara, Nazareth University

## **North Carolina – The Jane Davis Rourk Memorial Endowed Scholarship**

Claudia Barnett, The University of North Carolina, Chapel Hill  
Camryn Wolff, Duke University School of Medicine

## **Ohio – Rose Hartsook Endowed Scholarship for Post-Professional Students**

Sydney Ferguson, University of Findlay  
Allison Drees, University of Toledo  
Matthew Husband, Medical University of South Carolina

## **Texas Occupational Therapy Association Endowed Scholarship**

Gabriella Johnson, University of Texas Medical Branch at Galveston  
Sazla Hoang, Texas Woman's University  
Leslie Rognstad, Houston Community College

## **Utah Occupational Therapy Association Endowed Scholarship**

William Tucker, The University of Utah  
Lia Liu, The University of Utah

## **Virginia – Fred Sammons Endowed Scholarship**

Ashley Gros, Virginia Commonwealth University  
Sarah Frances House, James Madison University

## **Washington Occupational Therapy Association Endowed Scholarship**

Karin Johnson, University of Washington  
Robert Austria, University of Washington

## **West Virginia – The Charlotte Prudich, Elizabeth B. Devereaux, and Deborah Shamblin Endowed Scholarship**

Kiersten Smith, West Virginia University  
Mauro Maminta, West Virginia University

# THANK YOU FOR YOUR SERVICE! (as of January 2025)

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Timothy Reistetter, Secretary  
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Lianna Meyreles  
Executive Assistant

David Robertson  
Manager, Student Activities

Sandy Weiss  
Office Assistant

### Welcome:

Lindsey Chang started in May 2024 in the new position of Communications Coordinator. Lianna Meyreles joined the Foundation in March 2024 as the Executive Assistant.

# 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, 2023- September 30, 2024.

PROGRAM EXPENSES	2024	2023
Research	\$926,304	\$1,345,224
Education	\$572,006	\$546,082
<b>TOTAL PROGRAM SERVICES</b>	<b>\$1,498,310</b>	<b>\$1,891,306</b>
SUPPORT SERVICES		
General and Administration	\$951,673	\$803,882
Marketing and Development	\$205,013	\$187,231
<b>TOTAL SUPPORT SERVICES</b>	<b>\$1,156,686</b>	<b>\$991,113</b>
<b>TOTAL EXPENSES</b>	<b>\$2,654,996</b>	<b>\$2,882,419</b>

## STATEMENT OF FINANCIAL POSITION SEPTEMBER 30

ASSETS	FY 2024	FY 2023
Cash and Cash Equivalents	\$923,440	\$934,035
Prepaid Expenses and Other Assets	\$31,094	\$26,520
Accounts Receivable	\$17,199	\$17,955
Contributions Receivable	\$352,730	\$678,746
Investments	\$36,649,470	\$31,346,773
Right-of-Use-Assets - Operating	\$192,989	\$264,295
Property and Equipment, Net	\$912	\$17,042
<b>TOTAL ASSETS</b>	<b>\$38,167,834</b>	<b>\$33,285,366</b>
LIABILITIES AND NET ASSETS		
CURRENT LIABILITIES		
Accounts Payable and Accrued Expenses	\$144,197	\$308,752
Lease Liability - Operating	\$86,258	\$80,505
<b>TOTAL CURRENT LIABILITIES</b>	<b>\$230,455</b>	<b>\$389,257</b>
LONG TERM LIABILITIES		
Lease Liability - Operating	\$140,812	\$227,071
<b>TOTAL LIABILITIES</b>	<b>\$371,267</b>	<b>\$616,328</b>
NET ASSETS		
UNRESTRICTED		
Undesignated	\$21,377,567	\$18,245,344
Board-designated Quasi-endowment Funds	\$3,346,671	\$1,961,979
<b>TOTAL UNRESTRICTED NET ASSETS</b>	<b>\$24,724,238</b>	<b>\$20,207,323</b>
Temporarily Restricted	\$3,698,759	\$3,221,189
Permanently Restricted	\$9,373,570	\$9,240,526
<b>TOTAL NET ASSETS</b>	<b>\$37,796,567</b>	<b>\$32,669,038</b>
<b>TOTAL LIABILITIES AND NET ASSETS</b>	<b>\$38,167,834</b>	<b>\$33,285,366</b>

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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**ANNUAL REPORT**  
**2024**



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