



**AOTF** THE AMERICAN  
OCCUPATIONAL THERAPY  
FOUNDATION  
Building Evidence to Improve Practice & Health<sup>®</sup>

2021 ■ ■ ■ ■ ■  
Annual Report



# From Our Chair



Dear Friends, Partners, and Colleagues,

The mission of the Foundation is essential to the sustainability of our profession and to the value of occupational therapy practices for people, communities and populations. As we enter 2022, AOTF is looking forward to strategic planning, and implementing sustainable and impactful initiatives to build research capacity, strengthen scientific networks, and support occupational therapy scientists at all career stages. I would like to share several new initiatives that AOTF has already begun.

AOTF has partnered with Learning Health Systems Rehabilitation Research Network (LeaRRn) and the Center on Health Services Training and Research (CoHSTAR) to co-sponsor a workshop to advance grant writing skills for Implementation Science and Health Services Research. This intensive workshop will provide occupational therapy researchers and trainees valuable mentorship from established investigators this May and is the first of

what we hope, several co-sponsored events in 2022 and beyond.

We also saw the launch of the AOTF Promoting Occupational Therapy Research and Training to Advance Lives (PORTAL) initiative. The vision of the AOTF PORTAL is to provide a stable and sustained infrastructure for supporting occupational therapy scientists at all career stages. As an initial step, Drs. Grace Baranek, Natalie Leland, Kathy Lyons, Trudy Mallinson, Susan Murphy, Beth Pfeiffer, Gael Orsmond, Susy Stark and Beth Skidmore will be joining me to develop a five-year strategic plan. A huge shout-out to Beth Skidmore for her vision for PORTAL and the leadership she brings to this important initiative.

To continue our commitment to diversity, equity, and inclusion in the field of occupational therapy, AOTF launched the 'Nancy Talbot Postdoctoral Research Fellowship' inviting individuals from racial and ethnic groups underrepresented in health-related sciences to apply. Dr. Lady Rios-Vega, the inaugural awardee, will implement a project to reduce disparities in the utilization of occupational therapy services for Black and African American children with Autism and their families. The AOTF Board of Trustees also approved a financial commitment of \$25K per year over a five-year period to support training diverse clinical scientists in rehabilitation research through a NIH R25 training grant. AOTF will continue supporting emerging research with our grant programs, namely the Intervention Research Grant, Health Services Research Grant, Implementation Research Grant, and the AOTF-MJFF Parkinson's Disease Intervention Grant. We encourage you to apply for these AOTF pilot funding mechanisms.

In January, under the leadership of Drs. Janet Poole and Susan Murphy, AOTF sponsored an interdisciplinary Planning Grant Collective (PGC) to discuss and support new research on fatigue. Be sure to review the recommendations in an upcoming *OTJR: Occupation, Participation and Health* article. In April, AOTF will host our signature events at AOTA INSPIRE 2022, thanks to our sponsors. Breakfast with a Scholar will feature Dr. Kay Redfield Jamison on Mental Health and the State of the Science will address Trauma -Informed Care. In collaboration with AOTA, AOTF will also host the Future Scientist Institute, a mentorship program specifically tailored for undergraduate OT students where they'll also have the opportunity to participate in AOTF-sponsored events, attend the outgoing and incoming AOTA presidents' addresses, and the Eleanor Clarke Slagle Lecture, given by AOTF Trustee Kristie Patten.

AOTF's commitment to the science of occupational therapy and to building sustained and impactful programs and infrastructure to support occupational therapy researchers is energizing. During the first half of 2022, AOTF Board of Trustees will be developing a new three-year strategic plan. In addition to the new initiatives described above, additional strategic actions that advance the Foundation's mission will be defined and implemented. The success of the strategic initiatives requires partners, donors and volunteers. I ask for your partnership and engagement to advance the vision for a vibrant science that builds evidence in support of occupational therapy practice. Please consider a financial donation at [aotf.org/support](https://aotf.org/support).

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

A handwritten signature in black ink, reading "MJ Mulcahey". The signature is fluid and cursive, with the first letters of the first and last names being capitalized and prominent.

## Building Research Capacity to Sustain the Future of OT Research

Research capacity has been defined as the ability to define problems, set objectives and priorities, conduct sound scientific research, build sustainable institutions, and identify solutions to key (national) problems. Research capacity building or strengthening is defined as the process by which individuals, institutions and societies develop abilities – individually and collectively – to perform research effectively, efficiently and in a sustainable manner.

Our Annual Report cover this year shows the faces of our OT research grantees over the past several years. The Foundation, through the support of our donors, partners and volunteers, has invested in early and mid-career research investigators in an effort to not only generate needed research to help inform the clinical practice community, but to support the career advancement of these grantees. Integral to any junior faculty development is also the mentorship of more senior investigators. The hope of course is that when the junior investigators advance to successful senior investigators, with the help of the Foundation, that they will pay this mentorship forward. At the end of the day, the Foundation is not only supporting research, but the people that do the research. We are therefore helping to sustain the OT research enterprise.



The COVID-19 virus has and continues to negatively impact the research enterprise. Many research projects were suspended or had to be significantly retooled as a result of the virus. One result of this delay in conducting research has been the interruption in the career progression of more junior investigators. The expected timeline to promotion, tenure, research independence, etc. has been disrupted. Now, more than ever, the Foundation's effort to support the careers of OT research investigators is needed.

As we transition to 2022, many challenges remain. It appears likely the pandemic will eventually transition to an endemic, and hopefully be nowhere as disruptive to research and life in general. The timeline of this transition is anybody's guess, but we hope sooner than later. I continue to be truly impressed and inspired by the creativity, ingenuity, flexibility, adaptability and tenacity of OT researchers, including those funded by the Foundation, who have continued to move their research forward in these trying times. To all of our donors, partners and volunteers, a huge thank you. The Foundation remains fiscally sound and dedicated to playing an important role in advancing and sustaining OT research and researchers, as well as evidence-based practice.

Scott Campbell, PhD  
AOTF CEO

A handwritten signature in black ink, appearing to read 'Scott Campbell', written over a light blue background.

## STRATEGIC PLAN 2020-2022

- **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**



# Planning Grant Collective:

## Five Years and Growing

The 2021 AOTF Planning Grant Collective, ***Fatigue: An Understudied Barrier to Participating Fully in Daily Life***, was held virtually again this year. This timely topic was chosen considering many conditions have fatigue as a major characteristic, the issues related to the ongoing pandemic and what appears to be a major comorbidity in COVID “long haulers.” The planning committee for the workshop was co-chaired by **Janet Poole, PhD, OTR/L, FAOTA** (University of New Mexico) and **Susan Murphy, ScD, OTR/L** (University of Michigan), and also included **Erin Foster, PhD, OTD, MSCI, OTR/L** (Washington University in St. Louis), **Virgil Mathiowetz, PhD, OTR/L, FAOTA** (University of Minnesota), **MJ Mulcahey, PhD, OTR/L, CPPC, CLCP, FASIA** (Thomas Jefferson University), and **Alix Sleight Warner, PhD, OTD, MPH, OTR/L** (Cedars-Sinai Medical Center). A wide range of disciplines was represented at the workshop, as well as several funding agencies including the **Arthritis Foundation**, the **National Institute on Disability, Independent Living, and Rehabilitation Research (NIDILRR)**, the **Patient-Centered Outcomes Research Institute (PCORI)** and the following **NIH Institutes/Centers: National Cancer Institute (NCI); National Institute on Aging (NIA); and National Center for Complimentary and Integrative Health (NCCIH)**.

New priority areas of research were identified and included: the need for identification of fatigue subgroups/deep phenotypes; novel trial designs and comparative effectiveness research; implementation science research to improve delivery and effectiveness of fatigue interventions; and the need for consistent and comparable treatment taxonomy.

The Foundation intends to convene one Collective a year and plans are underway for 2022. We believe this interdisciplinary approach to identifying important research topics will result in critical new research in topics of great interest and opportunity for the OT profession.



## Advancing the Profession Through Scientific Inquiry

2021 has been another outstanding year for our research publication *OTJR: Occupation, Participation and Health*. The 2020 Impact Factor (1.768) and 5-Year Impact Factor (2.693) have both reached all-time highs.\* With 223 submissions from January 1 to November 1, 2021, *OTJR* is also tracking to have a record high number of submissions. SAGE Publishing selected *OTJR* as a journal with great potential for content growth and invested in the Journal's future by granting an additional 30% page volume publishing budget for 2021-2022 and beyond. This continued growth represents the contributions of quality data-driven research from authors and the rigorous processes of *OTJR*'s newest Editor-In-Chief, Timothy J. Wolf, OTD, PhD, OTR/L, FAOTA, Assistant Editor, Associate Editors, Editorial Fellows, Review Board Members, and SAGE Publishing Partners. In addition, the editorial team presented the AOTF/*OTJR* Short Course: Advances in Technology to Enhance Manuscript Writing and Publishing at AOTA INSPIRE 2021.

\*With the 2020 Impact Factor, Clarivate has introduced Early Access content in Journal Citation Reports to more accurately reflect the dynamic citation environment of rapid online publication, phasing in further changes over three years.



# Collaboratively Bringing OT Research to You:

## Virtually, OnDemand and In-Person

Our signature events at AOTA INSPIRE Conference 2021 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.

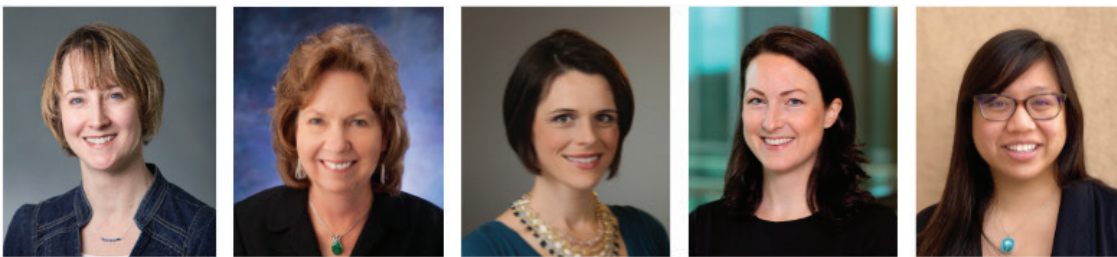
### EVENING WITH A SCHOLAR



#### What Really Matters at End of Life

Dr. BJ Miller, preeminent speaker on palliative and end-of-life care

### STATE OF THE SCIENCE



#### Intersections of Occupation and Self-Management of Chronic Conditions

Kathleen D. Lyons, ScD, OTR/L  
Janet L. Poole, PhD, OTR/L, FAOTA  
Beth Pyatak, PhD, OTR/L, CDE  
Alix Sleight, PhD, OTD, OTR/L  
Kristine Carandang, PhD, OTR/L  
(Moderator: Mary C. Lawlor, ScD, OTR/L, FAOTA)

Our webinar series, *Navigating Research During the COVID Pandemic*, spearheaded by Past Board Chair, **Mary Lawlor, ScD, OTR/L, FAOTA**, continued in 2021 with *Lessons Learned from Front Line Occupational Therapists and Implications for Research*.

Four panelists shared their unique stories in *Authentic Stakeholder Participation in Research*; exploring the practices, opportunities, barriers and benefits of stakeholder participation in, and throughout the research process, all with an aim to improve the delivery of care. Thanks to our Board Member **Stephen Shore, EdD**, along with **Anna Perng, Pamela Quinn, Kimberly Anderson-Erisman, PhD** for bringing their unique experiences to this must-see presentation.

Our Board Members **Mary Jane Mulcahey, PhD, OTR/L, CHC, CLP, FASIA** and **Kerri Morgan, PhD, OTR/L**, shared their SCI expertise on Coaching Care Partners of Children with SCI and Exercise, Physical Activity, and Adapted Sports for Persons with an SCI, in our joint presentation *Occupational Therapy Across the SCI Lifespan* with the Christopher & Dana Reeve Foundation's National Paralysis Resource Center during Spinal Cord Injury Awareness Month in September.

“Well-done research but also good examples of the importance of mentorship.”

Attendee

# Advancing our Research Efforts: Grants & More!

The Foundation's partnerships and donors support early career investigators, in development of preliminary proof-of-concept research data, through multiple grant programs. Over the past years, several AOTF grant recipients have received federal grant funding as a result of their research work funded by the AOTF grants and they continue to disseminate their work through publications and presentations at variety of forums.

In 2021, we reached the ninth year of continuous funding for our **Intervention Research Grant (IRG)** program. The IRG program continues to lay the groundwork to address the Foundation's mission and vision. With five new IRG recipients this year, the total funding amounts to \$249,540 for the IRG program for the year 2021. 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). We also extend a big thank you to the hundreds of students who supported the IRG program through the 2021 St. Catherine's Challenge.

In its third 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 as a result of receiving or not receiving care. With four new HSR grant recipients this year, the total funding amounts to \$363,166 for the HSR program for the year 2021.

In its second year, the **Implementation Research (IR) Grant**, in partnership with of 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 IR grant recipients this year, the total funding amounts to \$297,967 for our IR grant program for the year 2021. We thank NBCOT for providing the funding to initiate and sustain this program from 2019-2022.

Foundation-funded research continues to directly impact the field of OT! With the support of our partners, donors, and all the hardworking occupational therapists, we look forward to continuing this work in 2022.

## Intervention Grant Recipients

**Jewel Elias Crasta, PhD, OTR/L, Ohio State University**  
*Characterizing Occupational Therapy Intervention for Children with Autism Spectrum Disorders*  
(Mentor: Amy Darragh, PhD, OTR/L, FAOTA)

**Marion Russell, OTD, OTR/L, Creighton University**  
*Impact of COVID-19 on Family Quality of Life and Healthcare Access for Families with a Child with Diabetes*  
(Mentor: Vanessa Jewel, PhD, OTR/L)

**Areum Han, PhD, OTR/L, University of Alabama at Birmingham**  
*A Guided Eight-Week Online Acceptance and Commitment Therapy (ACT) Intervention for Distressed Family Caregivers of People with Dementia: A Mixed-Methods Pilot Study*  
(Mentor: Hon Yuen, PhD, OTR/L)

**Amy Armstrong-Heimsoth, OTD, OTR/L, Northern Arizona University**  
*Easing the Transition: Occupational Therapy Life Skills Curriculum for Former Foster System Youth*  
(Mentor: Heather Williamson, DrPH)

**Grace Kim, PhD, OTR/L, New York University**  
*Promoting Adherence in Upper Extremity Home-Based Rehabilitation Through Motivational Interviewing and Ecological Momentary Assessment: A Feasibility Study*  
(Mentor: Yael Goverover, PhD, OTR/L)

## Health Services Grant Recipients

**Anne Zachary, PhD, OTR/L, University of Tennessee Health Science Center**  
*Inequities in Access and Impact of Post-Stroke Home Occupational Therapy Services in a Statewide Medicaid Population*  
(Mentor: James E. Bailey, MD, MPH, FACP)

**Daniel Whitney, PhD, University of Michigan**  
*The Effect of Rehabilitation Utilization on Risk of Fragility Fracture and its Related Disease, Mortality, and Healthcare Cost Burden for Adults with Cerebral Palsy: Providing Actionable Information to Inform Rehabilitation Efforts*  
(Mentor: Susan L. Murphy, ScD, OTR/L, FAOTA)

**Jun Li, PhD, OTR/L, University of Tennessee Health Science Ctr.**  
*Acute Occupational Therapy Spending in the National Comprehensive Care for Joint Replacement Program*  
(Mentor: Andrew M. Ryan, PhD)

## Implementation Grant Recipients

**Lisa Juckett, PhD, OTR/L, CHT, Ohio State University**  
*Strategies to Promote the Implementation of Outcome Measures in Stroke Rehabilitation*  
(Mentor: Amy Darragh, PhD, OTR/L, FAOTA)

**Roberta Pineda, PhD, OTR/L, CNT, University of Southern California**  
*Implementation of the Baby Bridge Program via Telehealth to Enhance Access to Early Intervention Services in Los Angeles*  
(Mentor: Carol Peden, MB, ChB, MD, FRCA, FFICM, MPH)

**Sally Wasmuth, PhD, OTR, Indiana University**  
*Implementation of Narrative Theatre for Occupational Justice Promotion*  
(Mentor: Dawn Bravata, MD)



# Building the Future Research Workforce

Vital to the future of OT is the pipeline of research talent that will build new evidence for practice. This year, AOTF made three significant investments to bolster the future research workforce made possible through the philanthropic generosity of donors.

## Dr. Gary Kielhofner Doctoral Student Scholarship



Congratulations to our Kielhofner Research Scholarship Awardee, **Rachelle Brick, MSOT, OTR/L, PhD** Candidate, University of Pittsburgh, *Developing a Stakeholder-Driven Cancer Rehabilitation Intervention for Older Adults with Breast Cancer.*

Dr. Gary Kielhofner, DrPH, OTR, FAOTA, was one of the most influential and transformational figures in occupational therapy. Central to Gary's devotion to the science of OT was the development of new research talent.

## Nedra Gillette Endowed Research Fellowship

Congratulations to our 2021 Nedra Gillette Endowed Research Fellowship Awardee, **Emily Kilroy, MS, PhD**, University of Southern California Chan Division of Occupational Science and Occupational Therapy, *Neural Correlates of Sensory Processing In Autism Spectrum Disorder.*



To honor its namesake Nedra Gillette, the Nedra Gillette Endowed Research Fellowship award is in support of a postdoctoral researcher's foundational occupational therapy study into the human condition.

## AOTF and The Michael J. Fox Foundation Occupational Therapy in Parkinson's Disease Grant



The inaugural winner of the AOTF and The Michael J. Fox Foundation Occupational Therapy in Parkinson's Disease Intervention Research Grant is **Katrina Long, EdD, MS, OTR/L**, an Assistant Professor at San Jose State University's College of Health and Human Sciences. Her study *Pre-Active PD: A randomized control trial pilot study to improve self-*

*management of PA routines in adults with early stage Parkinson's disease* focuses on evaluating the feasibility and acceptability of Pre-Active PD, an early intervention to promote the role shift from passive-patient to active-participant in PD management. Pre-Active PD aims to increase physical activity participation using evidence-based behavior change and goal setting strategies.

**A**OTF and AOTA announced the cohort of entry-level students selected to participate in the **5th Annual Summer Institute of Future Scientists in Occupational Therapy**. The two half-day virtual sessions took place in June, hosted by Colorado State University. The 48 future scientists (which included the 2020 selectees) introduced students to a career in research, connected them with mentors in the occupational therapy scientific community, and immersed them in a research-focused professional experience. They explored topics through a series of mini-lectures and facilitated break-out rooms. Participants were also invited to attend the 9th Annual Virtual Occupational Therapy Summit of Scholars June 23rd-25th, which featured several AOTF leaders, Academy of Research members, committee members, and funding recipients who shared their expertise and knowledge.

# Recognizing Research Excellence

Every year, AOTF bestows awards and honors to individuals that contribute time, energy, and support to the fulfillment of the mission, goals, and objectives of AOTF.

## ACADEMY OF RESEARCH INDUCTEES



**Kathleen Doyle Lyons, ScD, OTR/L** is a rehabilitation scientist and professor at MGH Institute of Health Professions in Boston, Massachusetts. Her focus is on building the evidence base for occupational therapists working in oncology. She is trained in experimental design, mixed methods and implementation science. Her research program is designed to

answer the following question: How can we support people living with cancer to fully participate in meaningful activities, life roles, and society through theory-driven and evidence-based rehabilitation? She designs and tests pragmatic interventions that blend occupational therapy with behavioral therapies. Her research is primarily community-based as she has developed both telehealth and home-based interventions.



**Shawn C. Roll, PhD, OTR/L, RMSKS, FAOTA, FAIUM** is an Associate Professor at the University of Southern California's Chan Division of Occupational Science and Occupational Therapy, where he also directs the PhD in Occupational Science program. Dr. Roll is a licensed occupational therapist, registered sonographer, and occupational scientist who studies the relationships between

musculoskeletal conditions of the arms and hands, people's ability to perform activities and their health outcomes within the workplace. His specialties include using ultrasound to study carpal tunnel syndrome, which affects an estimated 10 million Americans with annual health care costs of \$2 billion. He also studies holistic approaches for improving the experience and results of hand therapy. His largest current project, funded by the National Institute for Occupational Safety and Health, is designing the next generation of intelligent "smart desks" that can automatically learn from, adapt to, and respond to users' habits and preferences to improve.



### Leadership Service Commendation

Wendy Coster, PhD, OT, OTR, FAOTA  
M. Pollie Price, PhD

### Meritorious Service Award

Tara C. Alexander, OTR/L, CPC  
Roger I. Ideishi, JD, OT/L, FAOTA  
Mary C. Lawlor, ScD, OTR/L, FAOTA

### Fred Sammons Volunteer Recognition Award

Pat Booth, MAT

### A. Jean Ayres Award

Leah Stein Duker, PhD, OTR/L  
Scott D. Tomchek, PhD, OTR/L, FAOTA

### Virginia Scardina Research Award of Excellence

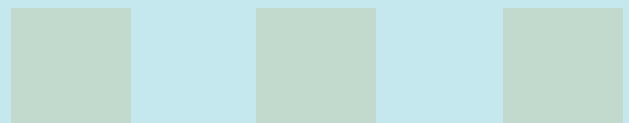
Aimee Piller, PhD, OTR/L, BCP

### Early-Career Research Excellence Award

Chih-Ying "Cynthia" Li, PhD, OTR/L

### Mid-Career Research Excellence Award

Jessica Kramer, PhD, OTR/L





# 53 Scholarships Awarded

With collaborations from organizational partners and OT state associations, AOTF awarded 53 scholarships to students pursuing post professional and associate degrees in the OT field. The scholarships ranged in value from \$150 to \$5,000. The OT Scholarship Program is one of the oldest of the Foundation's programs dating back to the establishment of AOTF in 1965. Thank you to the Scholarship Selection Committee, comprised of volunteer occupational therapy practitioners and educators, who reviewed all applications and recommended scholarship recipients.

## **OccupationalTherapy.com**

Case Peters - Northern Arizona University

Stephanie Gomez-Rubalcava - University of Southern California

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

Shannon Myers - Midwestern University-Downers Grove

Anna Bland - Arkansas State University-Jonesboro

Katherine Phillips - University of Wisconsin-Milwaukee

Michaela McBride - University of New Hampshire

## **Willard & Spackman Scholarship**

Katie Ericsson - University of South Dakota

Bayli Fugle - Keuka College

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

Gina Delgado - Nova Southeastern University-Tampa

## **The Gerry Balasta Scholarship**

Rachel Truax - Sage Colleges

Kappa Delta Phi Scholarship

Kimberly Nycz - Indiana University

Rachel Reindl - Washington University

## **Carolyn Kohn Memorial Scholarship**

Derrick Wegner - Stony Brook University

## **Mary Fiorentino Memorial Scholarship**

Savannah Burrup - A.T. Still University-Health

## **Mary Minglen Memorial Scholarship**

Kali Tripputi - University of Texas Medical Branch

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

Sarah Smith - Northern Arizona University

Julia Zezinka University of Pittsburgh

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

Catharine Kim - Stanbridge University

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

Fallon Roderick - Pacific University

## **The Network for LGBTQIA Concerns in Occupational Therapy Endowed Scholarship**

Seth Mitchell - University of Southern California

## **Alice Jantzen Memorial Scholarship**

Kelly Moring - Indiana University

## **Edith Weingarten Memorial Scholarship**

Abigail Thompson - University of Texas Medical Branch

## **The Linda Botten Endowed Scholarship**

Charles McMillan - Florida Gulf Coast University

## **The Lela Llorens Endowed Scholarship**

Jenna Senkeleski - Thomas Jefferson University

## **Janice McGraw Memorial Scholarship**

Jody Bennett - University of North Carolina at Chapel Hill

## **Carlotta Welles Scholarship**

Katherine Alsbrooks - Community College of Baltimore County

## **Diane Blicksilver Aja Memorial Scholarship**

Julianna Dole - University of Southern California

## **The Chuck Clark Scholarship**

Caitlin Read - Western New England University

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

Nina Spengler - Radford University

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

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

Eliana Meissner - Northern Arizona University

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

Trianna Davis - Howard University

### **The Florida Occupational Therapy Association Myra McDaniel Endowed Scholarship**

Rachel Scarboro - University of Florida

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

Anne Mokate - Midwestern University

### **The Kansas Occupational Therapy Association Gloria Scammahorn Memorial Endowed Scholarship**

Brianna Sugiura - University of Kansas Medical Center

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

Alexandrea Veale - Eastern Michigan University

### **The Mary Eileen Dixey Scholarship of the New Hampshire Occupational Therapy Association**

Quianna Willard - University of New Hampshire

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

Joy Yim - Stony Brook University

Maureen Laffey - Stony Brook University

Ian Gallagher - Stony Brook University

### **The North Carolina Occupational Therapy Association Endowed Scholarship**

Britni Alatorre - Winston-Salem State University

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

Heather Bowman - University of North Dakota

Rebecca Rimel - University of North Dakota

### **The Ohio Occupational Therapy Association Endowed Scholarship**

Samantha Miller - Ohio State University

Sarah Heldmann - Owens Community College

### **The Occupational Therapy Association of Oregon Endowed Scholarship Pacific University**

Alexandra Quinn - Pacific University

### **The Chris Ebbers Scholarship of the South Carolina Occupation Therapy Association**

Ashlyn Shealy - Medical University of South Carolina

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

Maria Theresa Bautista - University of Texas Medical Branch

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

Jessica Bodily - University of Utah

Kelsie Buchanan - Salt Lake Community College

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

Cara Harman - Virginia Commonwealth University

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

Ashley Lankford - Eastern Washington University

Megan Black - University of Washington

### **The Wisconsin Occupational Therapy Association Endowed Scholarship**

Jenna Keller - Concordia University Wisconsin

# Pi Theta Epsilon

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 10 new schools joining PTE in 2021: University of North Dakota-Casper (*pictured right*), Jacksonville University, Western New England University, Florida A&M, Methodist University, North Central College, Lewis University, Pace University, Lenoir-Rhyne University-Hickor and Columbia. For a fifth 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:**  
Keri Kamphoff- *Occupational Therapists Addressing Quality of Life Issues for Clients with Lymphedema*

**Award for Excellence in Interchapter Collaboration:**  
Alpha Iota at Creighton University, Delta Gamma at College of St. Mary & Epsilon Eta at Nebraska Methodist College.  
Scholarly Activity: Virtual Research Symposium

**Presidents Award:** Gamma Pi, Russell Sage College & Beta Psi, Stony Brook University

## 50 OT Schools Raised Over \$43,000!

Building new evidence for OT practice is a community effort. The **2021 St. Catherine Challenge**, a student-led fundraising initiative, raised over \$43,000 for the AOTF Intervention Research Grant Program. This unique seed-funding allows OT researchers to receive resources to collect pilot data and build proof of concept for new and novel ideas.

AOTF is so appreciative of the work and dedication of students and faculty and the support of everyone who made gifts. We know that as schools moved to remote education, students and faculty juggled virtual learning, fieldwork and health concerns yet remained dedicated to this philanthropic initiative. This year's success is a true testament to the commitment, innovation and perseverance of our young occupational therapists.



Top 2021 Fundraising School: University of Pittsburgh

## Thank You 2021 Participating Schools!

### Platinum Level-\$5,000-\$7,499

University of Pittsburgh

### Gold Level-\$2,500-\$4,999

New York University

Washington University in St. Louis+

University of Florida

### Silver Level-\$1,000-\$2,499

Columbia University

Indiana University

MGH Institution of Health Professionals\*

Misericordia University

San Jose State University

St. Catherine's University

Texas Woman's University

University of North Dakota

Anonymous

### Bronze-\$500-\$999

Boston University

Brenau University

Florida International University

Missouri State University

Spalding University+

St. Louis University

St. Scholastica University+

Stanbridge University+

Temple University

Towson University

Tufts University

University of Louisiana-Monroe

University of Illinois-Chicago

University of New Hampshire

University of Southern California

## AOTF 2021 ST. CATHERINE CHALLENGE

University of Texas Medical Branch-Galveston

University of Wisconsin-Milwaukee\*\*+

Virginia Commonwealth University

### Challenge Participants

Creighton University

Eastern Carolina University

Gwynedd Mercy University+

Indiana State University

Mary Baldwin University

Northern Arizona University

Nova Southeastern University, Tampa

Rockhurst University

Sacred Heart University

Salus University

Texas Tech

University of Mary

University of New England

University of Oklahoma, Health Sciences Ctr.

University of South Dakota

University of Tennessee Health Science Center

University of the Sciences

Virginia Commonwealth University

Xavier University

\*MVP

\*\*Rush to the Top

+Achieved 100% faculty participation

# Thank You 2021 Event Sponsors!

## EVENING WITH A SCHOLAR

### Founder



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THE GEORGE WASHINGTON UNIVERSITY

WASHINGTON, DC



### Patron



USC Chan Division  
of Occupational Science  
and Occupational Therapy



### Partner

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Kansas University  
New York University  
Nova Southeastern University  
The Ohio State University  
Sacred Heart University  
San Jose State University

University of New England  
University of New Hampshire  
University of North Carolina  
University of Oklahoma  
University of Pittsburgh  
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Madison

### Friends

Barbara Winthrop, OTR, FAOTA  
Illinois Occupational Therapy Assoc.

## STATE OF THE SCIENCE

### Vanguard



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### Pathfinder



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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.



“My AOTF grant was made possible through the philanthropic generosity of a community of donors. Thanks to their investment, I was able to secure a \$1.17M NSF grant, using preliminary research conducted with AOTF Intervention Research Grant funds.”

Mary Khetani, ScD, OTR/L

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- 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.

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### Welcome:

Oluwadunsin (Dunsin) Akinyemi joined the Foundation in August as the new Grants Administrator. In October, Satvika Garg was hired as the new Scientific Programs Officer and Careen Carlton was hired as Executive Assistant in January 2022.

### Farewell:

Grants Administrator, Grace Oni and Executive Assistant, Gaby Garcon left the Foundation in 2021 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 expenses in the following programmatic categories from October 1, 2020 – September 30, 2021:

<b>PROGRAM EXPENSES</b>	<b>2021</b>	<b>2020</b>
Research	\$1,280,938	\$715,458
Education	\$401,715	\$381,244
<b>Total Program Services</b>	<b>\$1,682,653</b>	<b>\$1,096,702</b>
<b>SUPPORT SERVICES</b>		
General and Administration	\$556,087	\$772,200
Marketing and Development	\$178,767	\$218,297
<b>Total Support Services</b>	<b>\$734,854</b>	<b>\$990,497</b>
<b>TOTAL EXPENSES</b>	<b>\$2,417,507</b>	<b>\$2,087,199</b>

## STATEMENT OF FINANCIAL POSITION SEPTEMBER 30

<b>ASSETS</b>	<b>FY 2021</b>	<b>FY 2020</b>
Cash and Cash Equivalents	\$991,078	\$638,947
Inventory	\$0	\$1,886
Prepaid Expenses and Other Assets	\$18,978	\$18,741
Interest Receivable	\$0	\$4,112
Contributions Receivable	\$1,037,567	\$694,154
Other Receivables	\$0	\$21,700
Investments	\$35,726,328	\$31,087,888
Property and Equipment, Net	\$42,336	\$61,141
<b>TOTAL ASSETS</b>	<b>\$37,816,287</b>	<b>\$32,528,569</b>
<b>LIABILITIES AND NET ASSETS</b>		
Accounts Payable and Accrued Expenses	\$65,882	\$130,561
Liability for Future Interest in Pooled Income Fund	\$1,492	\$1,492
Capital Lease Obligation Total	\$9,218	\$14,402
Deferred Revenue	\$0	\$69,200
Deferred Rent	\$58,955	\$61,059
<b>TOTAL LIABILITIES</b>	<b>\$135,547</b>	<b>\$276,714</b>
<b>NET ASSETS</b>		
Unrestricted:		
Undesignated	\$24,267,843	\$19,734,424
Board-designated Quasi-endowment Funds	\$456,876	\$456,876
<b>Total Unrestricted Net Assets</b>	<b>\$24,724,719</b>	<b>\$20,191,300</b>
Temporarily Restricted	\$4,136,750	\$3,451,946
Permanently Restricted	\$8,819,271	\$8,608,609
<b>TOTAL NET ASSETS</b>	<b>\$37,680,740</b>	<b>\$32,251,855</b>
<b>TOTAL LIABILITIES AND NET ASSETS</b>	<b>\$37,816,287</b>	<b>\$32,528,569</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.

The American Occupational Therapy Foundation is immensely grateful to our generous donors during the fiscal year 2021 (October 1, 2020 – September 30, 2021). As a supplement to our 2021 Annual Report, we are including our donors of under \$250.

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Cecilia Wirth  
Jodie Wise  
Rebecca Witkowski  
Bergsten  
Rose Wittersheim  
Kathleen Wolf  
Laurie Wolf  
Mary Kay Wolfe  
Leslie Wolfenden  
Aviva Wolff  
Jennifer Womack  
Bill Wong  
John Wong  
Judy Wood  
Jessica Wood  
Madison "Maddie" Wood  
Sarah Worthington  
Jamie Wronka  
Amy Wu  
Ching-Yi Wu  
Mary Yapp  
Linda Yee  
Trina Yogore  
Andrea Young  
Susan Young  
Jacki Young  
Abigail Young  
Lana Younglove  
Amy Yun  
Anne Zachry  
Andrea Zakrajsek  
Denise Zander  
Audrey Zapletal  
Laura Zeman  
Debra Ziegler  
Robert Zila  
Alison Zilioli  
Cynthia Zinkgraf  
Kasa Zipfel

Evelyn Zirkle  
Sarah Zurawski