



american optometric foundation

ANNUAL REPORT

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The American Optometric Foundation
is a philanthropic organization
which develops
and provides financial support
for optometric research and education
in vision and eye health.

During my term as President of the American Optometric Foundation (AOF), it was my personal goal to raise greater awareness of the American Academy of Optometry's philanthropic arm. Although the AOF is a part of Academy culture with a history of support for hundreds of leaders in optometric science, it is my impression that only a small percentage of Academy Fellows understand and appreciate the AOF. It is my hope to explain what the AOF is, what it does, why and how each of you can support it.

The AOF exists to support the advancement of optometric education and research. In this respect, the AOF is a perfect fit for the Academy. Fostering research is a key element in the Academy's goal of enhancing optometric practice. While the Annual Meeting provides a forum for presentation of research, and *Optometry and Vision Science* provides an archival record, it is the AOF that directly supports research. Considering this, every Fellow that believes in the goals of the Academy has a natural connection to the AOF.

The flagship program of the AOF is the William C. Ezell Fellowship. Through these fellowships, the AOF is able to support an elite group of talented young optometrists pursuing full-time careers in academic optometry and vision science. The Ezell Fellowships are extremely competitive, and the AOF would love to be able to grant a greater number of them than is currently possible.

In addition to the Ezell Fellowships, the AOF administers a number of scholarships, awards and grants for outstanding optometric residents and students, including the Antoinette Molinari Memorial Scholarship and the Vincent Salierno Scholarship. The AOF also grants the prestigious Glenn A. Fry Award and the Michael Harris Family Award for Excellence in Optometric Education.

Like the Academy itself, most of AOF's visible activities take place at the Annual Meeting. In addition to presentation of the Fry Award Lecture during the Awards ceremony, the AOF Research Luncheon has become a premier social and fund raising event. Two years ago a "silent auction" was introduced as a part of the luncheon, and has rapidly become a significant (and fun) fundraiser. The Annual Meeting has also brought generous support from those presenting continuing education courses. For the past two years, many of the lecturers have donated part or all of their honoraria to AOF.



Although the funds raised at the Annual Meeting are essential, they are not nearly enough to advance AOF's mission to the level we know it can achieve. The bulk of AOF's support comes through individual donors and corporate supporters, without whom we could not begin to administer our numerous programs. Each year we need to weigh carefully the number of Ezell Fellowships we can fund based on the support we have received, and each year there are several individuals who deserve funding, but for whom AOF simply does not have the resources.

In order for AOF to be a financially sound organization, able to provide support where it is needed and deserved, we need to build substantially greater funds that can perpetuate these awards for the future. For this the AOF needs the support of each and every Academy Fellow. Considering the great enjoyment and benefit each of us gets from our profession, this plea for you to give something back, in a way that supports the future, should be viewed as an opportunity as much as an obligation.

There are many ways to give. One time gifts are always welcome, but long term pledges give the AOF stability and the ability to plan for the future. A growing number of Fellows have generously joined the AOF President's Circle by pledging \$10,000. Another opportunity is through the AOF Legacy Society, in which AOF is included in one's estate plan.

Most of us are Fellows of the Academy because we love our profession. The AOF provides a meaningful way to express this passion. A contribution to the AOF is a contribution to the lifeblood of the profession—the optometric educators and researchers of the future. Do consider making a generous pledge to the AOF as an investment in our science, our profession, our Academy.

Sincerely,



Peter Bergenske, OD, FAAO
President

We express our deepest gratitude to the individuals and corporations whose support sustains the American Optometric Foundation. Their extraordinary generosity and leadership enable AOF to fulfill its mission.

FOUNDER'S CIRCLE

The American Optometric Foundation's Founders Circle recognizes major supporters who contribute \$100,000 or more. This contribution can be in the form of cash, appreciated securities, or through a planned gift such as a charitable trust or future bequest.

Irvin M. and Beatrice Borish
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AOF extends its appreciation to the following sponsors, who provide much-needed support for optometric students and researchers through AOF's fellowship, research grants, residency awards, scholarships and student award programs.

Advanced Medical Optics
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PRESIDENTS CIRCLE

The American Optometric Foundation's Presidents Circle was established in 1997 to recognize donors who contribute gifts of \$10,000 or more. This contribution can be in the form of a one-time gift or a long-term pledge. AOF is deeply grateful for the ongoing commitment from this special group of donors.

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Gerald and Andrya Lowther	Karla Zadnik <i>(In Memory of Karl R. Henry)</i>

AOF's supporters enjoy the Joint Alumni Reception in Dallas: (left to right) Michael Harris, Gunilla Haegerstrom Portnoy, Robert Portnoy, Elna and Tony Adams.

planned gifts

GIFTS BY WILL — PLANNING FOR OPTOMETRY'S FUTURE

Contributions received through bequests are a vital part of our planned giving program and help endow future programs and initiatives. A donor may choose to designate the American Optometric Foundation as the recipient of a bequest through his/her will by naming AOF to receive a specific dollar amount or a percentage of the residual estate. Gifts by will enable a donor to make a significant contribution to AOF while retaining full control of his/her assets.

To include a bequest to the American Optometric Foundation in your will, we suggest this simple statement: "I give, devise, and bequeath to the American Optometric Foundation, 6110 Executive Boulevard, Suite 506, Rockville, MD, 20852, the sum of \$____ (or ____% of my residual estate, or otherwise describe stocks, bonds, real estate, or other assets) to be used for general purposes (or describe a specific purpose)."

LEGACY SOCIETY

The Legacy Society recognizes the following individuals who have informed us that the American Optometric Foundation is designated as a beneficiary of a bequest through their will:

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2003 SILENT AUCTION

AOF wishes to thank the following contributors to the 2003 silent auction:

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GEORGE W. MERTZ SCHOLARSHIP FUND

In December 2002, AOF established a new scholarship fund in honor of Dr. George Mertz. Through the generosity of George's many friends and colleagues, AOF has built a lasting tribute to George Mertz from which young students and researchers will be supported in their innovation. AOF gratefully acknowledges the following individuals and organizations for their generous contributions to the George W. Mertz Scholarship Fund in 2004:



Dr. George W. Mertz

Anthony Adams	Suzanne M. Fleiszig	W. David Sullins, Jr.
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2004 CCL SECTION MATCHING GIFT CHALLENGE

In June 2004, Dr. Karla Zadnik was honored as one of the recipients of the 2004 Bausch & Lomb Visionaries Recognition Award. The award allowed Dr. Zadnik to make a \$30,000 donation to a vision-related, nonprofit organization of her choice. A longtime, enthusiastic supporter of AOF's mission, Dr. Zadnik stated, "When I first was notified of the award, my only thought was that I wanted Bausch & Lomb's charitable contribution to go to the AOF. My heart and soul are with the AOF and its support of the future of optometric education."

Dr. Zadnik offered her \$30,000 as a challenge grant to the AAO Section on Cornea and Contact Lenses to build the Section's Ezell Fellowship Fund. For every \$1,000 donated to the fund, Dr. Zadnik will match it from her Bausch & Lomb Award. CIBA Vision jumpstarted the challenge with a gift of \$2,500. In just three weeks, this campaign raised over \$27,000, bringing the total to \$54,000!



Dr. Karla Zadnik with Ronald L. Zarrella (right), Bausch & Lomb Chairman and CEO, and Paul G. Howes (left), Bausch & Lomb Senior Vice President and President of the Americas Region.



Dr. Michael Harris (right) presents Dr. Kent Daum with the 2003 Michael Harris Family Award for Excellence in Optometric Education

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Inspired by the need to advance optometric research and education, **Dr. William C. Ezell** founded the American Optometric Foundation (AOF) in 1947. As a means to fulfill his vision, AOF established the William C. Ezell Fellowship, which to this day, continues to provide financial support to postgraduate students who plan to pursue an academic career in optometry and vision science.

Over the past half-century, AOF and the Ezell Fellowship program have helped make optometric education what it is today. AOF salutes the Ezell Fellows, past and present, for their continuing contributions to vision science and to the profession of optometry.

- | | | | |
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Names in bold indicate Ezell Club Members.

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2004 – 2005 ezell fellowships

AMERICAN ACADEMY OF OPTOMETRY'S SECTION ON CORNEA AND CONTACT LENSES — EZELL FELLOW



Loretta Szczotka-Flynn, O.D., M.S., F.A.A.O.
 Case Western Reserve University
 Department of Ophthalmology
Research Focus: *Use of epidemiology and biostatistics to gain greater knowledge of inflammatory corneal disease associated with contact lens wear.*

The AOF has honored me by being chosen the AAO's Section on Cornea & Contact Lenses Ezell Fellow. I am dedicated to pursuing advanced training in optometric clinical research, and this Ezell Fellowship will assist me in devoting my time to this goal. The selection as the AAO's Section on Cornea & Contact Lenses Ezell Fellow is a message of confidence and support by my peers which encourages me to continue to pursue these academic and research goals.

BAUSCH & LOMB — EZELL FELLOW

Kit Guan, O.D., BSc
 University of Toronto
 Department of Ophthalmology and Vision Science



Research Focus: *Investigation of longitudinal change of retinal blood flow, short wavelength visual field sensitivity, and objective retinal imaging in diabetic patients with early and sight-threatening retinopathy.*

The generous support of the AOF and corporate sponsors such as Bausch & Lomb are critical to the continuance of clinical research. The benefits and risks of laboratory work for health care are rarely realized due to the lack of transitional research. Without such funding, it would be difficult to complete and publish the important work of our multi-disciplinary group. Such funding goes a long way to providing and maintaining the necessary laboratory supplies for cutting edge research. Your support is much appreciated.

CIBA VISION — EZELL FELLOW

Robert Wojciechowski, O.D., MS.C.
 Johns Hopkins University
 School of Medicine



Research Focus: *The complex interactions between genetic and environmental influences on refractive error and ocular component development.*

I am honored to be amongst this year's recipients of the Ezell Fellowship. I would like to thank CIBA Vision and the generous donors to the AOF for sponsoring this important award and encouraging research and education in optometry. Thanks to the CIBA Vision-Ezell Fellowship, I will be able to devote all my efforts to gathering and analyzing the extensive epidemiological data required for my research.

ESSILOR — EZELL FELLOW



Sanjeev Kasthurirangan, B.S.
 University of Houston
 College of Optometry

Research Focus: *Use of dynamics of the accommodative system as a tool to understand basic aspects and age-related changes in the accommodative system.*

I thank AOF and Essilor for awarding me the prestigious Ezell Fellowship. Apart from the financial benefits, the Ezell Fellowship provides immense recognition for upcoming researchers and educators in the optometric community. I am honored to be an Ezell Fellow. The award has provided me ample encouragement and impetus to carry on my academic pursuits.

OCULAR SCIENCES — EZELL FELLOW

Michael D. Twa, B.A., B.S., O.D., F.A.A.O.
The Ohio State University College of Optometry

Research Focus: *The application of data mining methods from computer sciences to the problem of feature extraction and pattern recognition in medical imaging. Second research is the study of biomechanical properties of the cornea.*



I am grateful and proud to be a repeat recipient of the American Optometric Foundation's William C. Ezell Fellowship that is supported by Ocular Sciences, Inc. This fellowship provides me with an important source of financial support that is especially

helpful in the early stages of my research and educational career.

VISTAKON — EZELL FELLOWS

Sandra Block, O.D., F.A.A.O.
Illinois College of Optometry

Research Focus: *Investigation of the visual performance of Fragile X adults pre- and post-pharmacological treatment for attention deficit disorders.*



I would like to thank the American Optometric Foundation and Vistakon for their support as I work towards my Ph.D. Reaching for this higher level of education and knowledge has been a dream of mine for more than a decade. It is rewarding to know that AOF and Vistakon believe in me enough to support my work. My long term goal is to conduct epidemiological research which supports the position of optometry as a primary care provider in children and individuals with disabilities.



Srihari Narayanan, B.Optom., M.S.
University of Houston College of Optometry

Research Focus: *The role of inflammation in the pathogenesis of dry eye disease.*

The support offered by the Ezell Fellowship has enhanced my confidence since it has placed me on a par with some of Optometry's greatest scholars. My happiness in obtaining this honor is shared by my family, friends, mentors and colleagues around the world. I would like to sincerely thank the AOF for this recognition and Vistakon for sponsoring this award.

2004 VISTAKON AWARDS OF EXCELLENCE IN CONTACT LENS PATIENT CARE

Purpose: To recognize outstanding student clinicians who have demonstrated excellence in contact lens patient care during their optometric education.

Nathan Crouch, O.D.
Illinois College of Optometry

Veronica Molina, O.D.
Indiana University School of Optometry

Jay Lizyness, O.D.
Michigan College of Optometry at Ferris State University

Lynette Johns, O.D.
New England College of Optometry

Leigh Cox, O.D.
Northeastern State University College of Optometry

Zoanne Schinas, O.D.
NOVA Southeastern University College of Optometry

David Kading, O.D.
Pacific University College of Optometry

Caroline Beesley, O.D.
Pennsylvania College of Optometry

Walter Yim, O.D.
Southern California College of Optometry

Cynthia Gillum, O.D.
Southern College of Optometry

Priscilla Louie, O.D.
SUNY College of Optometry

Dave Anderson, O.D.
The Ohio State University College of Optometry

Ashley Holloway, O.D.
University of Alabama-Birmingham School of Optometry

Melissa Dacumos, O.D.
University of California-Berkeley School of Optometry

Justin Stricklin, O.D.
University of Houston College of Optometry

Christopher Banniger, O.D.
University of Missouri-St. Louis School of Optometry

Ketan Kutlerywala, O.D.
Inter American University of Puerto Rico School of Optometry

Amal Hakim, O.D.
Universite de Montréal École d'optométrié

Sarah Stevens, O.D.
University of Waterloo School of Optometry

2004 VISTAKON STUDENT INVOLVEMENT AWARD

Purpose: Conferred annually to a deserving second or third year optometry student by the faculty of the Southern California College of Optometry for demonstrating a high degree of participation in College, professional and community service activities while maintaining a 3.0 or higher cumulative grade point average.

Randy McClellan
Southern California College of Optometry

2004 ANTOINETTE MOLINARI MEMORIAL SCHOLARSHIP

Purpose: A rotating, regional scholarship designed to assist an exceptional student who has extraordinary financial needs and, as such, would have difficulty meeting the financial requirements of attending optometry school. The student must maintain a grade point average of 3.5 or higher at the time of application.

Jennifer Lynn Stewart
New England College of Optometry

2004 - 2005 VINCENT SALIERNO SCHOLARSHIP

Purpose: A rotating scholarship that is awarded to the student chosen by the faculty as most deserving financially and educationally. The scholarship is renewed through the student's fourth year of optometry school, provided that the student remains in good standing and maintains a 3.0 grade point average or higher for all course work in optometry school.

Kimberlee Sakai
Southern California College of Optometry

*AOF's Residency Award program has been moved to Spring 2005.

**2004 ACUVUE EYE HEALTH ADVISOR
STUDENT CITIZENSHIP SCHOLARSHIP**

Purpose: To recognize outstanding student clinicians who best exemplify ideal eye care standards of practice.

Brian Colander
Illinois College of Optometry

Anne Pfeffer
Indiana University College of Optometry

Amy Dinardo
Michigan College of Optometry at Ferris State University

Crystal Klaahsen
New England College of Optometry

Rodney Bendure
Northeastern State University College of Optometry

Kelli Murrow
NOVA Southeastern University College of Optometry

Courtney Goetsch
Pacific University College of Optometry

Clark Chang
Pennsylvania College of Optometry

Brandie Mendina
Southern California College of Optometry

Joshua Garrett
Southern College of Optometry

Michael Halkias
SUNY College of Optometry

Trisha Anne Barnes
The Ohio State University College of Optometry

Matthew Mottela
University of Alabama-Birmingham
School of Optometry

Julia Polito
University of California-Berkeley School of Optometry

Kendra Powell
University of Houston College of Optometry

Mark Gifford
University of Missouri-St. Louis School of Optometry

Luis Navarro
Inter American University School of Optometry

Frederic Morin
Universite de Montréal École d'Optométrie

Name Pending
University of Waterloo School of Optometry

**2004 MICHAEL G. HARRIS FAMILY
AWARD FOR EXCELLENCE IN
OPTOMETRIC EDUCATION**

Purpose: To recognize an optometric educator who has demonstrated ongoing and consistent excellence in education of optometry students and/or advancement of optometric education.

Lawrence Gray, O.D., F.A.A.O.
(Awarded Posthumously)
Pennsylvania College of Optometry



Dr. Gray (right) receiving the 2004 Faculty of the Year Award from Dr. Anthony Di Stefano.

2004 GLENN A. FRY LECTURE AWARD

Purpose: To recognize a distinguished scientist or clinician for her or his current research contributions. The recipient is invited to present a special paper at the American Academy of Optometry's Annual Meeting.



John Flanagan, Ph.D, MCOptom, F.A.A.O.
University of Toronto School of Medicine
University of Waterloo School of Optometry

**2004 - 2005 VISTAKON RESEARCH
GRANTS — \$25,000 AND \$10,000**

Purpose: To support basic or clinical research in the area of soft disposable contact lenses.

\$25,000 GRANT WINNER:
Jason Nichols, OD, MPH, PhD, FAAO
The Ohio State University College of Optometry
The Interaction between Hydrogel Surface Lipid Binding and In-Vivo Lens Wettability

\$10,000 GRANT WINNER:
Jason Marsack, MS
University of Houston College of Optometry
Correction of Keratoconus Aberration with a Disposable Soft Contact Lens

AOF FELLOWS
(donor category closed)

Stanley J. Yamane
Dan O. Yoshii

AOF LIFE MEMBERS
(donor category closed)

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Thaddeus W. Bartles
Harold B. Bell
Irving Bennett
Charles A. Benson
Emile J. Bernard Jr.
Arthur W. Biber
William E. Blackman
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Frank A. Broome
Fred Burnett Jr.
Lucia S. Burnell
Paul D. Burnell
Glynn C. Capps
F. William Carter
Neil R. Cays
Joseph A. Chambers
Sam M. Chambers
Carl W. Childress
Mary E. Childress
Jack M. Christ
Bobby Christensen
Ramona Clifton-Porter
Ellen L. Colley
Charlie Collins
Bert C. Corwin
Harry Coyle
O. Doyle Dannenberg
Jay Dean

William L. DeBruhl
William D. Dellande
Thomas D. Dennis
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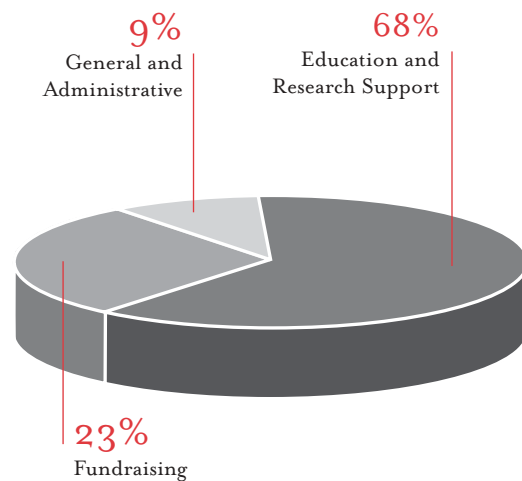
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financial summary

JULY 1, 2003 — JUNE 30, 2004

	2003 — 2004	2002 — 2003
Total Assets	\$ 1,249,432	\$ 1,207,058
Total Liabilities	12,510	13,797
NET ASSETS		
Board-Designated Endowment	396,669	583,207
General Unrestricted	21,605	(193,742)
Temporarily Restricted	639,430	625,196
Permanently Restricted	179,218	178,600
Total Net Assets	\$ 1,236,922	\$ 1,193,261
REVENUE, SUPPORT, AND GAINS		
Unrestricted	144,963	121,975
Temporarily Restricted	225,276	344,222
Permanently Restricted	618	600
Total Revenue, Support, and Gains	\$ 370,857	\$ 466,797
EXPENSES		
Education and Research Support	222,222	194,948
Fundraising	75,268	95,772
General and Administrative	29,706	34,367
Total Expenses	\$ 327,196	\$ 325,087

FISCAL YEAR 2004 EXPENSES



The American Optometric Foundation's audited financial statements may be obtained by writing to:

American Optometric Foundation
6110 Executive Blvd., Suite 506
Rockville, MD 20852 USA

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