

Memorial Gifts to Honor Occupational Therapists and to Promote our Profession  
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The field of occupational therapy incorporates many dedicated therapists who passionately devote their talents and careers to an area of practice, a facility, a mission, or a cause. To honor therapists who have passed, their family, friends and colleagues are often limited to one-time requests for a donation to a deserving charity. Such donations, utilized for a good cause, offer neither on-going giving nor acknowledgment to the occupational therapists.

Developing endowed scholarships, fellowships, research grants at universities, memorial funds at agencies, and specific tools at facilities offer high priced, perpetuating contributions and memorials. Somewhere in the financial middle ground between endowments and a check to a charity lie options for creative, economical methods to memorize therapists, advance our university programs, further facilities, and promote occupational therapy.

Objective 1: the participant will define five venues to establish perpetual, sustainable memorials and endowments to honor fallen therapists and loved ones.

1. High economic level, scholarships, chairs.
2. High cost permanent buildings, halls, rooms.
3. Low cost tangible permanent or temporary contributions.
4. Low cost intangible contributions.
5. One-time or on-going memorial events and activities.

Objective 2: the participant will determine five methods to establish planned giving to endowments at universities, facilities and agencies, including AOTA, FOTA.

1. Encourage donations on individual basis.
2. Establish endowments and endowment procedure.
3. Establish wish list of items and options at various price levels.
4. Establish memorial events and activities.
5. Establish a memorial marketing procedure.

Objective 3: The participant will describe seven techniques to promote the endowments and memorials.

1. Press releases.
2. Articles in university/agency newsletters.
3. Posters.
4. Annual get together.

5. Alumni group.
6. Annual reminder via email, newsletter, meeting.
7. Word of mouth.
8. Social media.

## TRADITIONAL MODELS OF MEMORIALS TO LOVED ONES

University of Illinois Memorial Stadium to commemorate those who gave their life in World War I \$2M in 1923

Ben Hill Griffin Football Stadium \$XXXM

The Google Anita Borg Memorial Scholarship \$XXM

John Simon Guggenheim Fellowship

Alice C. Jantzen Fellowship

AOTA and AOTF scholarships

Fred Sammons life insurance policy for AOTA

Charlie Sheen \$1M to USO for entertainment facility and...

## HIGH-END \$\$\$\$ ECONOMIC LEVEL

Planned giving to provide scholarships, foundations, stadiums, halls, chair.

Annuities, wills, payment plans, donate land, house, and car,

Payment plans, group donations, corporate match,

Interest, tax concerns,

Consult tax expert for donations and for techniques to growing your donation.

## TYPICAL \$ LOW-END OPTION

One time donation to a charity, or agency,

One-time donations are put to great use by these agencies...

but we miss the element of memorializing our colleague.

## SOMEWHERE IN THE CREATIVE \$\$ MIDDLE

1. Low cost tangible permanent or temporary memorial contributions.

2. Low cost intangible memorial contributions.

### 3. One-time or on-going memorial events and activities.

#### WHERE

Memorials at OT venue, facility, university OT Department, agency.

Memorials at a non-OT venue, as a community agency, park, museum, playground, beach, airport, rest area, place of worship, school, humane society, DV shelter, homeless shelter, library \_\_\_\_\_

#### TANGIBLE MEMORIALS

Infrastructure-dependent.

Permanent or temporary?

Level of care involved.

Gardens, trees, kitchen/appliances, bench, artwork, rocking chair, wheelchair practice area, playground, picnic table, splint pan, computer/computer lab, AT, bedroom, driving simulators, splint pans, lounge, fish tank, kids area in waiting room, rest area on bike or hike trail, bricks in Ybor City or Freedom Playground,

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or wish list item...

Specific contributions to existing scholarships at university/AOTA/FOTA.

One-time or periodic events with tangible or intangible results.

Paint room at DV shelter,

Annual donation to food bank,

Make quilts, or knitted preemie caps,

Dress for Success room decorated,

Home (re)construction event for Habitat for Humanity,

Adapting home for Rebuilding Together, Rebuilding Tampa Together,

Art show, art sale,

Blood donation, Hair donation, Used Book drive, Back to school drive,

Tutoring project, Bowling event, skating event,

YMCA scholarship to sports camp,

Micro loans,

Annual walk with T-shirts,

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WHY DO I WANT TO GIVE TO AN AGENCY?  
WHY DO I WANT TO GIVE BACK TO MY UNIVERSITY?

University programs and agencies are like our children. If I quit supporting my children just because they did something I didn't like, I wouldn't be speaking to them.

REASON TO DONATE

Because

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WHY SHOULD UNIVERSITY/AGENCY SEEK MEMORIAL CONTRIBUTIONS?

1. Budget considerations.
2. Opportunity to honor colleagues.
3. Networking.
4. Forge new & strengthen current ties to community/alumni/agencies.
5. Enhance reputation.

ESTABLISHING YOUR MEMORIAL GIFT OR EVENT

1. Determine group of decision makers.

Peers, colleagues, neighbors, friends from place of worship or volunteer agency.

2. Basic budget and energy level.

GOAL: Maximum results with minimal input.

ZERO...

3. PASSION Activity Analysis of honored person:

PASSION

PLACE OF EMPLOYMENT-work agency, department,

ACTIVITIES OF HOME AND FAMILY--family activities as sports, dance, camping, hiking, holiday rituals,

SPIRITUAL/RELIGIOUS—place of worship, activities, and events

SOCIAL and LEISURE--crafts, arts, yoga, gardening, tai chi, theatre, concerts, musical instrument, flower arranging, martial arts, Zumba, biking, running, walking, fitness, knitting group...

INTERESTS and INVESTMENT of time priorities--education, family, health, volunteer activities...

ORGANIZATIONS--AOTA, FOTA, political organization, YMCA, The Spring, American Cancer Society, Humane Society,

NO NOs—things or events that are not on the person's area of interest.

4.. Focus on a few projects.

Consider upkeep, long-term actions.

One time event?

Annual event?

Upkeep? Garden with monthly commitment.

5.. Think about the list. Again.

Clean out the closet again.

6. Present a few options to targeted family caregivers.

7. Draft a written format with details.

8.,9.,10.,Revise PRN.

9. Do it.

10. Market.

Call local press/TV for press releases.

Articles in university/agency newsletters.

Contact OT Practice, OT Advance.

Posters.

Annual get together.

Alumni group.

Annual reminder via email, newsletter, meeting.

Word of mouth.

Social media.

For every 10 games you play or every 5 reality shows you watch, for every 5 drinks you drink, for every 5 manicures. for every 100 jokes and fun emails you send or read, send out an email or repost on social media.

Inform AOTA, FOTA, and employment place.

Reasons NOT to do this

1. No time.
2. No money.
3. Other people have more severe needs.
4. An item may not last, such as splint pan, appliance.
5. May require too much follow up, garden.
6. No time, no money.
7. Too much hassle.
8. Easier to write a check to an agency.
9. No time, no money.
10. No time, no money.

The only reason to do this is

BECAUSE \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

#### AGENCY/UNIVERSITY RESPONSIBILITY

How do we set up endowments and wish list?

#### MAKE A WAY TO ESTABLISH ENDOWMENTS AND PRICE RANGE WISH LIST

Make these steps department or personal goals.

1. Set up Endowments through university foundation or other vehicle.
2. Develop creative gifting program.  
Named fieldwork, lecture, and research forum...
3. Develop creative wish list in various price brackets...  
Permanent items vs. non-permanent items.

--Consider technological changes, wear and tear.

Driving simulator.

Rehab kitchen and items.

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3. Design creative ways to memorialize.

Plaque, write up in facility magazine, opening ceremony, press release, social media, Annual luncheon to meet fellowship winner.

#### HOW TO DO THIS AT UNIVERSITY/AGENCY/FACILITY/NPO?

1. Make establishing endowment a department goal or individual goal.
2. Make establishing wish list and memorial procedure a department or individual goal.
3. Make establishing a memorial event a department or individual goal.
4. Make establishing the memorial process a department or individual goal.
5. Make establishing marketing the memorials a department or individual goal.

MAKE THESE STEPS DEPARTMENTAL AND/OR INDIVIDUAL GOALS!!

#### ONLINE RESOURCES

1. <http://aota.org/Students/Aid/Scholarships.aspx>
2. <http://www.aotf.org/scholarshipsgrants/scholarshipprogram.aspx>
3. [http://www.edmonton.ca/for\\_residents/municipal\\_cemeteries/in-memory.asp](http://www.edmonton.ca/for_residents/municipal_cemeteries/in-memory.asp)
4. <http://directory.tbo.com/4271519/Freedom-Playground-Foundation-Tampa-FL>
5. <http://www.plannedgiving.com/>
6. Foundations information: [www.cof.org](http://www.cof.org)
7. Online wish list: <http://giving.choa.org/wishlist>, <http://giving.choa.org/wishlist>,
8. Memorial plaques: <http://www.plaquemaker.com/index.html>
9. Micro loans: [www.kiva.org](http://www.kiva.org), [www.accionusa.org](http://www.accionusa.org),  
<http://www.worldvisionmicro.org>,
10. Charity ratings" [www.charitynavigator.org](http://www.charitynavigator.org), [www.charitywatchdog.org](http://www.charitywatchdog.org).

Please feel free to review the story that motivated this presentation and the establishment of the Judie Pink-Goldin OT Fellowship at the University of Florida.

<http://phhp.ufl.edu/alumni-giving/news-events/scholarship-gift-honors-a-mothers-legacy/>