



OPTIMIST INTERNATIONAL FOUNDATION



2021 - 2022 Annual Report

Fellow Optimist,

For the 2021-2022 Optimist year we chose the theme, "Making a Difference, Yes, We Can!". Thanks to your generous donations and support of the Optimist International Foundation we were able to accomplish this. The Foundation owes a huge thank you to all of our individual donors, all of our Clubs that made a club contribution and to all of the District Foundation Representatives and Club Foundation Representatives.

18 of our District Foundation Representatives finished their year as a Distinguished DFR. Congratulations to them for the extra effort that they put forth to make their Districts Distinguished. Once again, we saw an outstanding effort by the Michigan District for raising the greatest amount in total donations. The Optimist District with the highest dollar donations per member and the largest total dollar increase over the prior year was the South Carolina District and the Pacific Southeast District had the greatest percentage increase over the prior year.

A few highlights for the 2021-22 Optimist year:

The 2021-2022 year saw some records set with the highest number of Dime-a-Day contributors, 3,174 which only equates to 7.5% of our Members giving and the greatest amount in planned giving gifts to the Foundation.

The Foundation contributed over \$250,000 to Optimist International with \$85,000 specifically designated to support the ongoing work of JOI.

The Foundation awarded \$51,024 through the Childhood Health and Wellness program, including Childhood Cancer.

Over the past four years it has been my honor and privilege to serve our Members as a Member of the OIF Board of Directors and to have served as Foundation President during the 2021-2022 Optimist year. Over my four years on the Board, I have had the honor of serving with other Board members who truly understood their roles as Board members and continued to be great fiduciaries of the Foundation dollars. Thank you to Melvin Bannister, Bill Meyers, the late Don Sievers, Jan Oord Graves, Deb Merritt, Teri Davis, T G Thomas, Jim Kondrasuk and Ben DeRemer who served on the Board with me. Also, to our Foundation staff, especially Executive Director, Craig Boring and Sr. Director of Donor Services, Shenita Taylor.

Yours in Optimism and Gratitude,

Marc

Marc D. Katz, President

Thanks again to everyone for making the "Making a Difference, Yes We Can!" dream a reality.

Mission:

Seeking, receiving and managing funds and real and personal property for the benefit of Optimist International and its Member Clubs for charitable, literary, and educational activities

Vision:

We envision a Foundation that can provide significant funding for Optimist International's youth and service programs and is proudly supported by individual Optimists, their Clubs, and the community at large.

Board of Directors:

Marc Katz, *President*

Debra Merritt, *President-Elect*

Ben DeRemer, *Director*

Jim Kondrasuk, *Director*

Teri Davis, *Treasurer*

Craig Boring, *Executive Director/Secretary*

Staff:

Craig Boring, *Executive Director*

Shenita Taylor, *Sr. Director of Donor Services*

Kimberly Carroll-Bevly, *Donor Services Coordinator*

Connie Pellock, *CFO - Optimist International*

Michelle Blackburn, *Accountant - Optimist International*

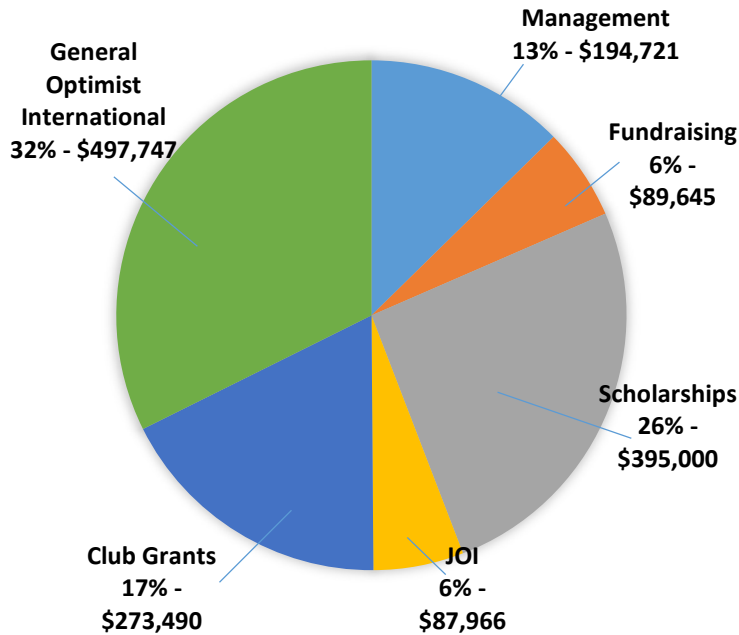
Ashley Morris, *Administrative Assistant*



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\$1,538,569 EXPENDITURES



General O. I. Grants:

Childhood Cancer Campaign, Club Campaign Fund, *The Optimist*, accounting, growth, disaster relief, International development, allocated staff time for programs, training at International Convention, endowment payouts

Management and Operations:

Audit, legal, banking, investment expense, some convention expenses, currency transactions, state registrations

Fundraising:

Recognition program, planned giving, brochures

Key Achievements:

- Supported the Optimist International Oratorical World Championship Contest by funding the US and International Regional winners, plus the first and third place winners in the finals totaling \$55,000.
- Paid out \$305,346 to Clubs utilizing the Club Campaign program and added an additional \$104,447 in interest to the Club Campaign funds.
- Assisted Clubs in receiving \$273,489 in charitable contributions for their own local programs through the Pass Through Grant Program.
- Sent 140 students off to college with Optimist International oratorical, essay, and CCDHH scholarships totaling \$296,000.

Financial Information: 10/1/21 - 9/30/22

Revenues and Support

Public Support	\$1,165,719
Revenues, Gains and Losses	\$1,507,840

Expenses

Program Services	\$1,254,203
Management/Fundraising	\$284,366

Net Assets

Beginning of year	\$7,686,083
End of year	\$5,347,448

Per Audited Financial Statements

Making A Difference, Yes We Can!



OPTIMIST INTERNATIONAL FOUNDATION
4494 LINDELL BLVD
SAINT LOUIS, MO 63108

Phone: (800) 500-8130
Email: info@oifoundation.org
Website: www.oifoundation.org