



# OPTIMIST INTERNATIONAL FOUNDATION



## 2020 - 2021 Annual Report

Fellow Optimist,

Thank you for making the celebration of our 50<sup>th</sup> year of "Helping Optimists Help Kids!" an extraordinary one! It was extremely gratifying to visit with so many of you throughout the year, be it in person or via Zoom. Through these encounters, I enjoyed learning about the many wonderful projects and supports Optimists provide for youth and their families in their communities. I was heartened to hear about the many ways that our Foundation has helped Clubs implement these projects.

Our fiftieth anniversary was made even more memorable by our partnership with Jeff Hanson Art. Through their generosity we were able to use Jeff's art to adorn our incentives and sell beautiful Jeff Hanson Art note cards, scarves and ties. We were all grief stricken when Jeff passed away in December of 2020 from the reoccurrence of a brain tumor. His beautiful, giving spirit lives on through his art. Julie and Hal, Jeff's parents, continue his work. They hope to help reach Jeff's goal of 10 million raised for charities. The OIF was able to credit Jeff Hanson Art with \$70,000, helping the Hanson's move the bar closer towards Jeff's goal.

While COVID continued to rear its ugly head, we persevered and achieved many successful initiatives and events during the 2020-2021 Optimist year. A few are listed below:

- Continued to support all of the Optimist programs we had traditionally supported to the full extent.
- Three new areas of support were implemented: \$2500 contribution to the OI Jr Golf Program, Increase to a max of \$1000 for the Club Matching Grant and the establishment of a JOI Past President Scholarship Fund.
- The Optimist International Scholarship programs were implemented back to full extent. The Optimist International Foundation funded the District Oratorical, Essay and CCDH scholarships for the US and Caribbean. Also, the World Oratorical scholarships were underwritten by the OIF for the participants from the US, The Caribbean and the World Regions.
- The Junior Optimist program was supported with \$85,000 in funding.
- Awarded Grants to Clubs via the Club Grant, Childhood Health and Wellness and Disaster Relief totaled over \$85,000.

The many achievements of the 50<sup>th</sup> Anniversary year could not have happened without the dedication of our District Foundation Representatives. I am thrilled that 23 of our DFRs achieved Distinguished status! In addition, four of these achieved Outstanding recognition for highest level in a particular level. Thank you to our incredible DFR's.

It has been a phenomenal experience to be a member of the OIF Board for four years, culminating with serving as President during the 50<sup>th</sup> anniversary year. I will always be grateful and humbled by this honor. There have been numerous blessings that I will take with me from my years on the OIF Board: the privilege of serving with and learning from many outstanding Optimists over the years, serving with exceptional fellow Board Members, working with an incredibly dedicated OIF staff, collaborating with the OI Board and staff to best support the needs of our youth. Probably my most valued take away is the undying, tremendous generosity of our members. Fellow Optimists, this is your foundation.

Thank you for your continued support of our Foundation!

Yours in Optimism and Gratitude,

Janet Oord Graves, President

### 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:

Janet Oord Graves, *President*

Marc Katz, *President-Elect*

T G Thomas / Debra Merritt, *Treasurer*

Jim Kondrasuk, *Director*

Teri Davis, *Director*

Craig Boring, *Executive Director/Secretary*

### Staff:

Craig Boring, *Executive Director*

Shenita Taylor, Sr. *Director of Donor Services*

Patricia Ashby, *Donor Services Coordinator*

Connie Pellock, *CFO - Optimist International*

Michelle Blackburn, *Accountant - Optimist International*

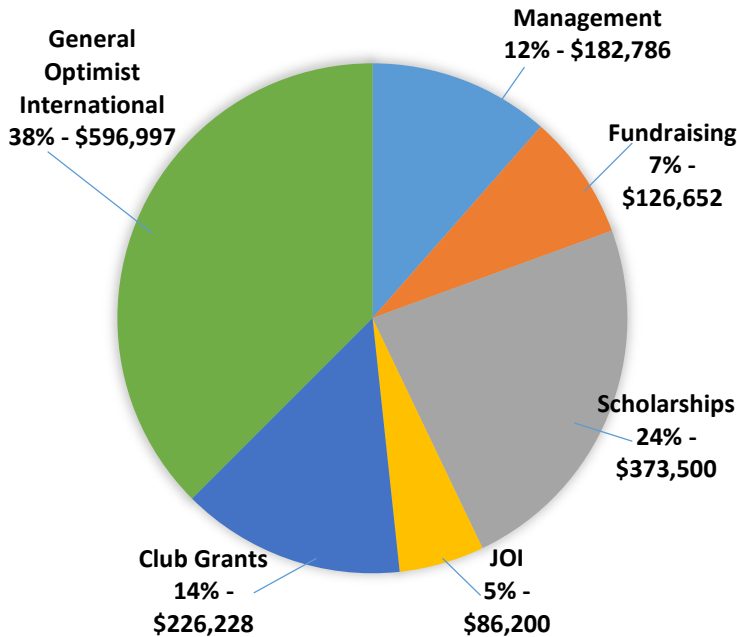
Zoe Williams, *Administrative Assistant*



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### \$1,592,363 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:

- Awarded \$97,054 through the Childhood Health and Wellness Program, including Childhood Cancer Campaign.
- Paid out \$255,702 to Clubs utilizing the Club Campaign program and added an additional \$86,039 in interest to the Club Campaign funds.
- Sent 120 students off to college with Optimist International oratorical, essay, and CCDHH scholarships totaling \$244,500.
- Supported the Optimist International Oratorical World Championship Contest by funding the US and International Regional winners and the first place winner in the finals totaling \$65,000.

### Financial Information: 10/1/20 - 9/30/21

#### Revenues and Support

Public Support	\$1,135,993
Revenues, Gains and Losses	\$2,010,635

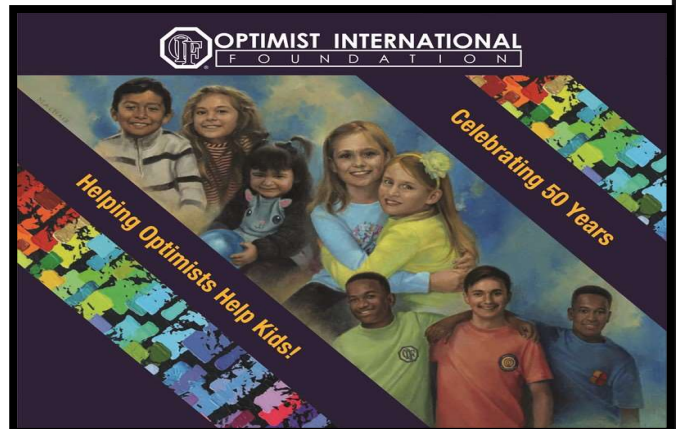
#### Expenses

Program Services	\$1,282,925
Management/Fundraising	\$309,438

#### Net Assets

Beginning of year	\$6,131,818
End of year	\$7,686,083

*Per Audited Financial Statements*



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