



# OPTIMIST INTERNATIONAL FOUNDATION

## 2015 - 2016 Annual Report

My Fellow Optimist,

I am pleased to present you with a few of the many Foundation high lights for the Optimist year 2015-2016. First we will start with the theme that was adopted for the year, "Together We Make It Happen." Looking back, this coming together led the way to another successful year for the Foundation. We as Optimist owe a huge "thank you" to all of the District Foundation Representatives and Club Foundation Representatives. It is through their tremendous effort that we are able to provide the many programs and services of Optimist International.

Speaking of District Foundation Representatives, thirteen of them finished their year as Distinguished DFR's and they are to be congratulated for their extra effort. Once again we saw an outstanding effort on the part of the Michigan District for raising the greatest total donations. The District with the highest donations per member was Arizona and the Capital-Virginia District had the greatest percentage increase in giving.

Allow me to quickly praise the Women's Philanthropy Council (WPC). What a wonderful group of Optimist charged with spreading the word on the importance of the role that women play in philanthropy. Their efforts also make possible club grants and provide sponsorship in the girls oratorical program. Thank you ladies, you are much appreciated.

We are so fortunate to have a variety of giving possibilities and again they make all of our programs possible. The William H. Harrison Society, the Christian D. Larson Partners, the Friends of Today, the Presidents Club Members, Dime-A-Day contributors and certainly our District Scholarship Sponsors. One other giving opportunity that I want to mention is the Friends of Tomorrow Society. This being the arranging of a charitable bequest to the Optimist International Foundation. During the year we were blessed with one such Friend of Tomorrow and it will certainly provide for the future needs of Optimist International and the Optimist International Foundation.

It has been my honor and pleasure to serve these past four years on the board and to serve as your President during 2015-2016. I cannot say enough about having served with such an outstanding group of board members. As volunteers, their deep concern for the wellbeing of the Foundation will continue to lead us well into the future.

During the year I found it necessary to spend some additional time in St. Louis. I must say that in doing so I grew to have a greater admiration and respect for the Foundation staff consisting of Shenita Taylor and Jessica Hurn. Thank you both so much, you made the transition go so smoothly. And now, with the addition of Craig Boring as our Executive Director, join me in knowing that your Foundation is in good hands.

Thank you all, "Together We Make It Happen"- And We Did!

Yours in Optimism,

Ed Finn

OIF President 2015-2016



### **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:**

Ed Finn, *President*  
Don Crall, *President-Elect*  
Sandy Williams, *Treasurer*

Melvin Bannister, *Director*  
Don Sievers, *Director*  
Craig Boring, *Executive Director/Secretary*

### **Staff:**

Craig Boring, *Executive Director*  
Shenita Taylor, *Director of Donor Services*  
Jessica Hurn, *Donor Relations Manager*

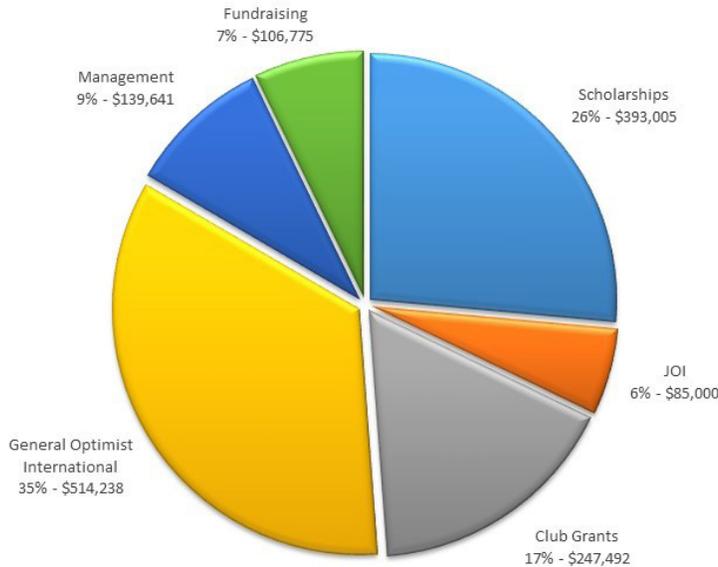
Connie Pellock, *CFO - Optimist International*  
Michelle Blackburn, *Accountant - Optimist International*



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### 1, 486,151 Expenditures



### Key Achievements:

- Sent 128 students to college with Foundation-funded scholarships totaling \$295,500
- Paid out \$246,164 to Clubs utilizing the Club Campaign program and added an additional \$10,175 in interest for their use while providing charitable, literary and educational programs
- Assisted Clubs in receiving \$247,492 in charitable contributions for their local programs through the Pass Through program
- Helped 269 Optimists help 5,285 children and their families by awarding 20 Club Grants
- Supported the launch of the Optimist International Oratorical World Championship Contest through commitment of start-up funding

### 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

### Financial Information: 10/1/15 - 9/30/16

#### Revenues and Support

Public Support	\$1,350,475
Revenues, Gains and Losses	\$667,252

#### Expenses

Program Services	\$1,239,735
Management/Fundraising	\$ 246,416

#### Net Assets

Beginning of year	\$3,799,843
End of year	\$4,331,419

*Per Audited Financial Statements*



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