



# OPTIMIST INTERNATIONAL FOUNDATION

## 2017 - 2018 Annual Report

Fellow Optimist,

As we began the 2017-2018 Optimist year we had a vision to Reach New Heights Together, and we accomplished our goal through the dedication of many to the Optimist International Foundation efforts. Two leading examples of that remarkable effort are that Member giving increased to 7% and Club donations were at 33%.

The money we collect and safe guard funds the programs our Clubs and Districts work hard to maintain for the youth they serve. When we are tired from an event we just finished, the smiles on the children's faces rejuvenate us, and we are ready to go again. Financial contributions make that consistency possible.

Some of the highlights of the past year include:

- Initiation of the Trendsetter Award. We challenged our DFRs to add three new Presidents Club Members and maintain the previous year total, or add 20 new Dime a Day Members and maintain previous year total. We had 13 DFRs accept the challenge and receive honors on stage at the Optimist International Convention in Ottawa. It was my privilege to recognize this original class of outstanding performers.
- The creation of the inaugural class of Lifetime Members to the William H. Harrison Society. Members reached a lifetime-giving total of \$100,000 or more to the Optimist International Foundation. It was a tremendous honor to recognize these amazing Optimists on stage at Ottawa. We are so proud of all of you.  
*The group consists of: Gary Addison, Indiana South; Patricia Beouy (deceased); Bob & Toni Garner, Florida; Ron Graves, South Texas; Karen Monville, Michigan; Herb Strather, Michigan*

I would like to offer special congratulations to our 15 Distinguished DFRs and our 3 Outstanding and Distinguished DFRs. You led your districts to Reach New Heights Together. That is the key to your success.

- The World Oratorical Contest was initiated during my tenure on the OIF Board. The program originally drew some skepticism due to concerns over how it would be funded. This past year OIF stepped forward to cover the U. S. and Caribbean and World Regional winners, plus the first-, second- and third-place winners from those respective areas.

We watched Dominique from California give a flawless speech to win second place in the international contest. You might wonder whether that is simply what is expected of contestants, however, Dominique overcame a speech blockage to earn her achievements. Keep working on it, Dominique!

The past four years serving on the OIF Board and my final year as President are very special. I was lucky to work with dedicated board members who shared my passion for the importance of OIF in the complete picture of Optimist. We worked as a family, and I will have fond memories forever.

Thank you for allowing me to serve our members.

*Sandra Williams*  
Sandra Williams, 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:

Sandra Williams, *President*  
Melvin Bannister, *President-Elect*  
Bill Meyers, *Treasurer*

Janet Oord Graves, *Director*  
Don Sievers, *Director*  
Craig Boring, *Executive Director/Secretary*

### Staff:

Craig Boring, *Executive Director*  
Shenita Taylor, *Sr. Director of Donor Services*  
Patricia Ashby, *Donor Services Coordinator*

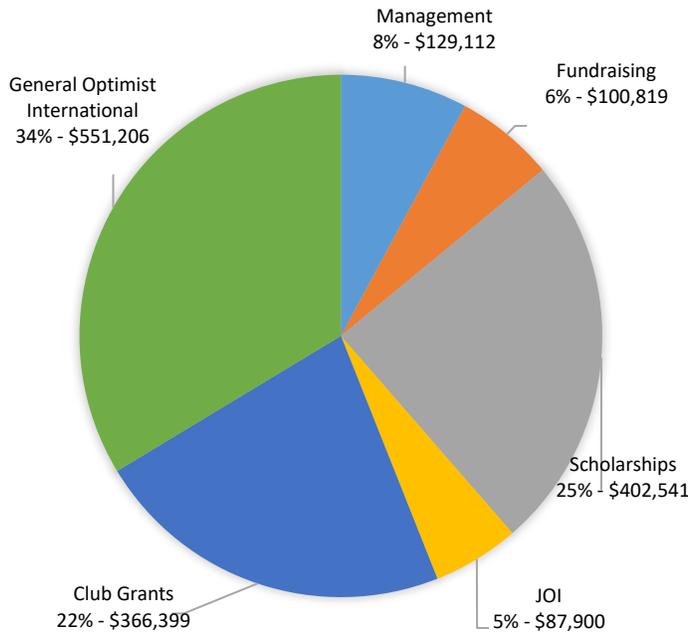
Theresa Ovelgoenner, *CFO - Optimist International*  
Michelle Blackburn, *Accountant - Optimist International*  
Zoe Williams, *Administrative Assistant*



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### \$1,637,977 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

### Financial Information: 10/1/17 - 9/30/18

#### Revenues and Support

Public Support	\$1,158,632
Revenues, Gains and Losses	\$805,023

#### Expenses

Program Services	\$1,408,046
Management/Fundraising	\$ 229,931

#### Net Assets

Beginning of year	\$4,884,386
End of year	\$5,209,809

*Per Audited Financial Statements*

### Key Achievements:

- Supported the Optimist International World Oratorical Championship Contest by funding the US and International Winners totaling \$65,000.
- Paid out \$297,731 to Clubs utilizing the Club Campaign program and added an additional \$46,063 in interest to Club Campaign funds.
- Sent 126 students off to college with Optimist International oratorical, essay, and CCDHH scholarships totaling \$358,500
- Contributed \$53,420 towards the OI Research Fellowship at Johns Hopkins. Plus, an additional \$77,000 towards a new research effort around pediatric bone marrow transplants.
- Helped 381 Optimists help 9,046 children and their families by awarding 21 Club Grants including 1 grant to a Club in Africa.



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