



OPTIMIST INTERNATIONAL FOUNDATION

2019 - 2020 Annual Report

Fellow Optimist,

For the 2019-2020 Optimist year we chose Go For The Gold as our theme, reflecting The Optimist International Foundation's commitment to excellence. Thanks to your incredible generosity we had one of the best first quarters in years, surpassing our previous year by 10%.

But then the world seemed to turn upside down and we found ourselves in a very challenging situation. Businesses were closed, people laid off, and social gatherings came to a standstill. Optimist Clubs couldn't meet in person and the whole Optimist world had to learn to survive in a virtual environment.

I am very proud that our Foundation rose to the occasion and took on a new theme, Excellence in Adversity. With support from the OI staff we were able to keep our team employed, maintain our key programs, and continue to assist Optimist Clubs in helping children. I am also very proud of the giving spirit of Optimists who continued to help the Foundation despite their own difficult situations.

One of the highlights of our year was participating in the first Virtual Optimist World Oratorical. While many organizations were cancelling their premiere events, our Foundation provided \$45,000 in scholarships to make it possible to hold the event. It was very successful and we are grateful to the Optimists whose support allowed us to host this great contest.

Other highlights include:

- Paid out \$251,985 to Clubs utilizing the Club Campaign Program and added an additional \$70,869 in interest to the Club Campaign funds.
- Assisted Clubs in receiving \$201,580 in charitable contributions for their own local programs through the Pass Through Program.
- Awarded \$76,447 through the Childhood Health and Wellness Program, including Childhood Cancer Campaign.
- Sent 121 students off to college with Optimist International oratorical, essay, and CCDHH scholarships totaling \$259,500.

Nearly 400 years ago, British minister Robert South noted that "Problems can become opportunities when the right people come together." Time has not diminished this observation and I was blessed to lead our Foundation with the right people. I want to thank the incredible Optimists on our Foundation Board for their dedication and keen insights that kept our Foundation strong. I also want to thank the exceptional staff at our Foundation who work tirelessly to support our programs and Optimist Clubs around the world.

For the last four years I have been privileged to serve you, the Optimist family. I wish to thank all the Optimists who have helped and guided me throughout my tenure. I especially wish to thank my wife Linda whose support has been so important.

Thank you all and let's make our 50th anniversary year the best ever!

Optimistically Yours,

Bill Meyers, 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:

Bill Meyers, *President*

Janet Oord Graves, *President-Elect*

Marc Katz, *Treasurer*

Jim Kondrasuk, *Director*

T G Thomas, *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*

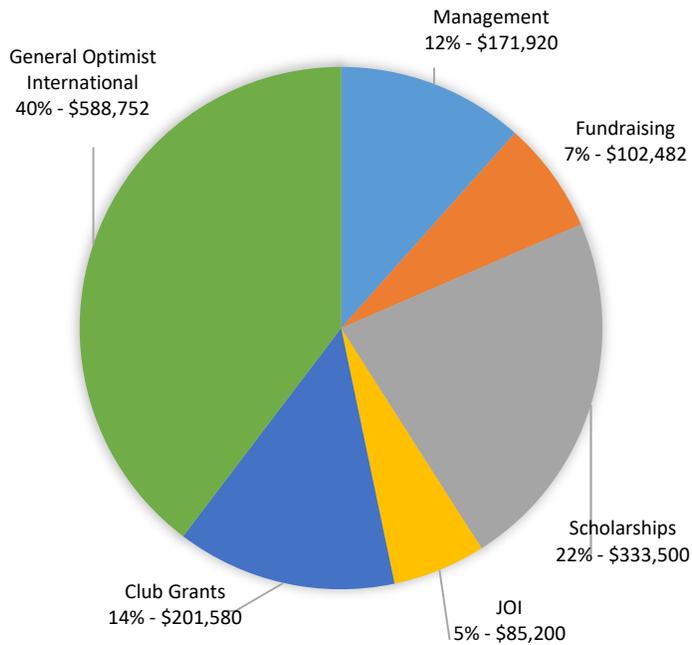
Zoe Williams, *Administrative Assistant*



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\$1,483,434 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 modified Optimist International Oratorical World Championship Contest by funding the US and International Regional winners and the first place winner in the finals totaling \$45,000.
- Paid out \$100,275 on endowments for community projects and scholarships.
- Assisted 334 Optimists to help 9,691 children and their families by awarding 20 Club Grants.
- Contributed \$85,000 to support the ongoing work of the Junior Optimist Program.

Financial Information: 10/1/19 - 9/30/20

Revenues and Support

| | |
|----------------------------|-------------|
| Public Support | \$1,256,008 |
| Revenues, Gains and Losses | \$1,198,749 |

Expenses

| | |
|------------------------|-------------|
| Program Services | \$1,209,032 |
| Management/Fundraising | \$274,402 |

Net Assets

| | |
|-------------------|-------------|
| Beginning of year | \$5,160,495 |
| End of year | \$6,131,818 |

Per Audited Financial Statements



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