



OPTIMIST INTERNATIONAL FOUNDATION

2022 - 2023 Annual Report



To my Optimist friends and family –

On behalf of the Optimist International Foundation, I would like to thank you for your gracious and heartfelt giving during the 2022-2023 year. Your kindness and generosity helped improve the lives of children in communities worldwide. Our organization is now stronger because of you.

The theme for 2022-2023 was "Hearts United in Optimism," which focused on the reason why we as Optimists give our time and resources to help children (our hearts) and the unity between Optimist International and the Optimist International Foundation – since our organizations are dependent upon one another for success. You, my fellow Optimists, made this theme a reality.

We started the year with the implementation of a new Recognition Program which replaced our former incentive-based program. Our goal was to place a greater emphasis on personally recognizing our donors. As a result of this change, and thanks to your continued generous support, we were able to allocate more funds to support OI youth programs, such as JOI and Junior Golf, as well as provide additional grants to clubs through both of the Foundation's grant programs.

During the 2022-2023 year there was a 23% increase in unrestricted donations as well as an increase in the number of Dime-a-Day and President's Club memberships. Additionally, our average dollar per member total increased from \$16.05 to \$19.82. Just a few other highlights for the year are:

1. We assisted 150 students with college scholarships totaling \$320,000 due to their participation in the Essay, Oratorical, and CCDHH programs.
2. We increased our support of the JOI program to \$135,000.
3. We assisted clubs in receiving \$282,421 in charitable contributions for their local activities through the Pass Through Program.

It was a dream come true for me to serve on the Foundation's Board of Directors and an honor and privilege to serve as the 2022-2023 Optimist International Foundation President.

I would like to personally thank the other members of the Board of Directors that I had the pleasure of serving with for their time, encouragement, guidance and support over the past several years, as well as their dedication to the Foundation's mission. Those fellow Board members are Jan Oord Graves, Marc Katz, Teri Davis, Ben DeRemer, Jim Kondrasuk, and Fatima Plater.

Another huge thank you goes to Foundation's Executive Director Craig Boring, Senior Director of Donor Services Shenita Taylor, and the rest of the staff at OIF headquarters in St. Louis.

And a very special shout out and well deserved thank you to our DFRs and CFRs, our literal boots on the ground, for all their efforts in support of the Foundation. Twenty-five of the 2022-2023 DFRs were honored for their efforts in making their Districts Distinguished. A very special congratulations and thank you to our Outstanding District, the Ohio District, that not only raised the greatest amount in donations, but had the highest dollar per member in donations and largest percentage increase in donations over the prior year.

Yours in Optimism and Appreciation,

Thank you again – my Optimist family – to all the clubs and individual members who donated to the Foundation. Your generosity and support is truly appreciated. You are the "heart" of the Foundation, and we can't do it without you.

Debra Merritt
2022-2023 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:

Debra Merritt, *President*
Teri Davis, *President-Elect*
Ben DeRemer, *Treasurer*

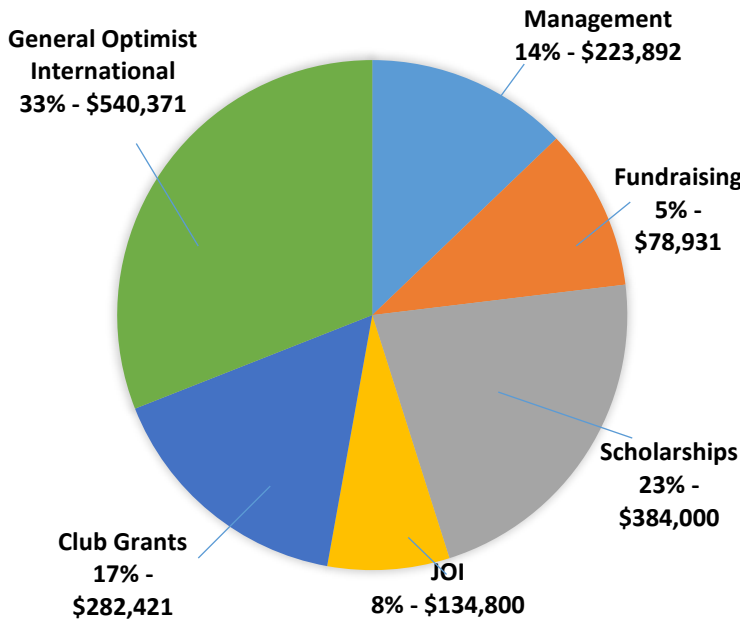
Jim Kondrasuk, *Director*
Fatima Plater, *Director*
Craig Boring, *Executive Director/Secretary*



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\$1,644,415 EXPENDITURES



Key Achievements:

- Assisted 387 Optimists to help 13,965 children and their families by awarding 21 Club Grants

- Paid out \$1,363,631 to Clubs utilizing the Club Campaign program and added an additional \$100,963 in interest to the Club Campaign funds.

- Paid out \$45,194 on endowments for community projects and scholarships.

- Supported the OI World Oratorical Championship by funding the U.S. and International Regional winners, plus the first and third place winners in the finals totaling \$50,000.

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: 10/1/22 - 9/30/23

Revenues and Support

Public Support	\$1,375,913
Revenues, Gains and Losses	\$1,587,146

Expenses

Program Services	\$1,341,592
Management/Fundraising	\$302,823

Net Assets

Beginning of year	\$5,347,448
End of year	\$6,666,092

Per Audited Financial Statements



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