



Optimist International Foundation  
Donor's Guide to Giving





# Optimist International Foundation

## Donor's Guide to Giving

### History

Optimist International Foundation was established in 1971 exclusively for the charitable, literary and educational purposes of Optimist International, a community service-based organization committed to creating a

more optimistic future for young people through innovative programs. The Foundation's Board of Directors grants funds to Optimist International each year for the development and improvement of International programs.

The Foundation has grown steadily since 1971 and is recognized as a not-for-profit 501(c)(3) charitable organization.

Optimist International Foundation works with Optimist Clubs located in over 3,800 communities in the United States, Europe and the Caribbean. Programs funded by the Foundation serve 1.5 million children annually. Optimist International Foundation depends on the support from Optimist Clubs and individual Members, the general public, businesses and corporations.



## Mission

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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

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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.

~Helping Optimists Help Kids~

# Volunteers

## District Foundation Representatives

A District Foundation Representative (DFR) serves as a liaison between the District and the Foundation. DFRs promote the programs of the Foundation and solicit funds.

### Job Duties:

- Be a positive, knowledgeable force, speaking on behalf of the Foundation in your District.
- Attend a training conference and take advantage of workshops at the International Convention.
- Keep your Governor, your Governor's team and your District Members informed about programs and goals of the Foundation.
- Plan and conduct presentations and training sessions at District and Club meetings.
- Coordinate fundraising efforts in your District, which include conducting special fundraising events.
- Ask for donations to the Foundation.
- Ask Members about dollar-matching programs at their companies.
- Ask for business gifts from business owners or decision-makers.
- Send contributions directly to the Foundation.
- Handle the Donor Recognition for Club and individual contributors in your District.
- Remember the opportunities of bequests and wills.
- Identify major gift prospects and strategize with the Foundation staff/Board about possible approach scenarios.
- Make your own gift early in the year to help set the pace.

### Skills Needed:

- Must be a supporter of the Foundation and a believer of its worth.
- Must be able to effectively relate to people both verbally and in writing.
- Must have a desire to understand and promote the Foundation's programs.

# Volunteers

## Club Foundation Representatives

A Club Foundation Representative (CFR) is appointed by the Club President. The CFR serves until replaced. Appointment forms are filled out and signed by the Club President and returned to the Foundation office for record-keeping purposes. Appointments can also be made directly on the Foundation's website.



## The Role of the CFR:

- Inform the Club and its Members about the Foundation programs, including:
  - Dime-A-Day
  - Presidents Club
  - Friends of Today
  - Friends of Tomorrow
  - Christian D. Larson Partners
  - William H. Harrison Society
  - Club Campaign Fund
  - Club Pass-Through Grants
  - Honor/Memorial/Veteran Contributions
  - \$365 Club Gifts
  - Benefactor Levels
  - Women's Philanthropy Council
  - Executives Club
  - Club Grant Program
- Solicit gifts from individual Members and the Club.
- Host a Club fundraiser to benefit the Foundation.
- Send contributions directly to the Foundation office.
- Ask Members about dollar-matching programs at Members' employers.
- Ask for business gifts from Club Members who are business owners.
- Identify prospects for Planned Giving program and contact Foundation Office with prospect names.
- Attend training sessions held by DFRs at District meetings.
- Vote for the Club in Board election if Club qualifies.

# Programs

## Dime-A-Day

Building a future where every kid counts.

Can you spare a dime a day?

Individuals who donate \$36.50 or a dime a day are honored with a lapel pin.



### Save approximately a week's worth of dimes by:

- bypassing the vending machine for an afternoon snack
- skipping the fries
- waiting to get coffee at the office



### Save approximately a month's worth of dimes by:

- ordering plain coffee instead of a "grande cappuccino"
- sending a greeting card from a box rather than an individually purchased card
- brown-bagging lunch instead of ordering out for a day

### Save approximately a year's worth of dimes by:

- giving up one golf game
- catching a few movies on video instead of at the theater
- clipping grocery coupons for a month

Most of us could easily contribute a Dime-a-Day every year of our membership as Optimists.

Optimists who donate \$36.50 are eligible to cast their vote for the incoming Director for the OIF Board.



# Programs

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## The Women's Philanthropy Council

It is not surprising that women bring a different perspective to their giving than men do. Research shows that women tend to give where they believe they can make a difference with their gift – regardless of the amount of the gift. The giving circle of the Women's Philanthropy Council is the perfect solution for these generous women.

The Women's Philanthropy Council funds scholarships and Club Grants across the US and in the Caribbean. Membership in the Women's Philanthropy Council begins with an annual gift of at least \$100.



Donors to the Women's Philanthropy Council are honored with a pink purse lapel pin.



Men are eligible and welcome to join as well!





# Programs

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The Women's Philanthropy Council contributes gifts given to:

- Fund Club Grants annually for the Optimist International Foundation.
- Fund scholarships in an Optimist District.
- Present a workshop related to women and giving at the Optimist International Convention.
- Maintain contacts with women who have an affinity for Optimism and its programs.
- Be available to discuss women's giving concerns on a District, Zone, or Club level.
- Provide funds to Optimist International Foundation, which help support every international program of OI.



The Women's Philanthropy Council also hosts a  
*Purse Snatching* annually at the  
Optimist International Convention.

# Programs

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## Presidents Club

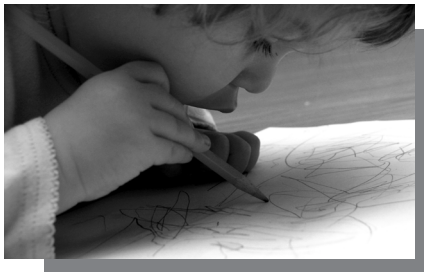
Members may join the Presidents Club by making an initial gift of \$250 and renewing each year for a \$250 annual contribution.

Each year at the International Convention, members are recognized with a ribbon for their badge and are invited to attend a function exclusively for members of the Presidents Club.

Donors receive a prestigious lapel pin showing that they are members of the Presidents Club.

## Friends of Today

A Friend of Today makes a minimum donation of \$500 annually to the Foundation and receives a signed and numbered collector's print. The print is shipped to the DFR to be framed and presented at a District meeting.



## Friends of Tomorrow

The Friends of Tomorrow program recognizes Donors who have made a provision for the Foundation through their estate plan. A bequest in a will, naming the Foundation as a trust recipient, gifting a life insurance policy or establishing a charitable gift annuity are some of the ways to qualify for membership.

# Programs

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## Christian D. Larson Partners

A recognition level honoring the author of The Optimist Creed. Those who follow the Creed and help fund the Foundation's mission through their personal giving of \$1,000 unrestricted become members of the Christian D. Larson Partners.

# Christian D. Larson

### Approved Guidelines:

- Memberships are numbered.
- Membership numbers are assigned on the date actual checks, cash or stock are received by the Foundations' bank or brokerage accounts – not based on pledge date.
- Membership numbers are assigned irrespective of Foundation.
- Memberships are available to individuals only (not couples, not Clubs) – but may be given by a Club in honor or in memory of someone.
- Individual Members do not have to be a Member of Optimist International.
- Gifts must be for the unrestricted use of the Foundation.
- Gifts are credited to the writer of the check and included in recognition totals.
- Christian D. Larson Partners receive a plaque presented by the DFR (if a Member), Plaques are mailed if not a member.
- Donors may combine multiple unrestricted gifts in one Optimist fiscal year to achieve the \$1,000 level.

# Programs

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## Executives Club

The Executives Club of the Optimist International Foundation offers a way for businesses to support the Foundation. Investments from the business community begin with a minimum commitment of \$1,000, requested annually, making the business an active member of the Executives Club. The donation made by the business will help fund scholarships, provide funding for Optimist International programs like junior golf and youth leadership and service, and helps Clubs engage in supporting the needs of youth in their own communities.

Members of the Executives Club may choose to be recognized by linking their website to the Foundation website, by receiving a framed print suitable for display in the office or home, and receiving a complimentary subscription to *The Optimist* magazine.





## Programs

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### **William H. Harrison Society**

This society is named after the first Optimist International President, William H. Harrison, whose drive and determination helped propel

Optimist International into a premier service organization. The Foundation's Board of Directors created this Society as a special way to recognize the major donors of the Foundation.

To become a member of the society, life-to-date giving to the Optimist International Foundation must be \$10,000 or more. Annual contributions of \$1,000 are required to maintain active membership in the society. Members of the society are invited to attend a recognition dinner with the Foundation's Board of Directors at the International Convention, and are listed on the Foundation website.

#### **Guidelines:**

1. Donor must have a life-to-date history of \$10,000 and contribute \$1,000 annually to the Foundation.
2. Not a pledge program; the Member must have contributed the actual dollars to become a Member.
3. Members of the WHHS are invited to a recognition dinner with the Foundations' Boards of Directors at the International Convention.
4. Must continue to contribute \$1,000 annually to remain a member.
5. Members receive a ribbon noting their Membership in the WHHS to be worn with Convention badge.

# Lifetime Recognition Levels

Individuals receive a pin and Clubs receive a banner emblem for each level reached.

Amount	Recognition Level	Pin
• Benefactor	\$1,000	Gold, no stone
• Honored Benefactor	\$2,500	Gold, Amethyst
• Distinguished Benefactor	\$5,000	Gold, Aquamarine
• Eminent Benefactor	\$10,000	Gold, Blue Sapphire
• Bronze Benefactor	\$15,000	Gold, Yellow Topaz
• Silver Benefactor	\$25,000	Gold, Ruby
• Golden Benefactor	\$50,000	Gold, Emerald
• Diamond Benefactor	\$75,000	Gold, Diamond
• Copper Benefactor	\$100,000	Silver, One Diamond
• Pearl Benefactor	\$250,000	Silver, Two Diamonds
• Sterling Benefactor	\$500,000	Silver, Three Diamonds
• Platinum Benefactor	\$1,000,000	Silver, Four Diamonds



# Programs

## Club Campaign Fund

The purpose of the Club Campaign Fund is to support a literary, educational or charitable program of a Club.

# Club Campaign Fund

### Guidelines:

1. Simple interest prorated over the year is accrued on the fund balance.\*
2. The fund must be established for a minimum of three months before a withdrawal may be processed.
3. Maximum fund balance is unlimited.
4. Minimum fund balance of \$500 before a withdrawal is required.
5. Minimum withdrawal from fund is \$500.
6. Withdrawals are paid out with principal first before any interest is distributed.
7. To meet auditor's requirements, requests for withdrawal must be in writing and describe how the funds are to be used.
8. This campaign is separate from all Optimist International Foundation programs and no prior contributions may be attributed to the Club Campaign Fund.
9. Contributions must be designated by the Donor on check or attached paperwork for the Club Campaign Fund at the time of remittance.
10. Checks must be made payable to Optimist International Foundation.
11. The funds are restricted for Club's specific Campaign Fund only and must be for a charitable purpose.

*\*Rates may change. Please contact the Foundation for current rates.*

# Programs

## Club Grant Program

The Club Grant Program provides \$500 matching grants for new projects by Optimist Clubs. This program enables the Foundation to assist Clubs implementing new projects/events in their community.



The review committee for club grants strives to achieve geographical balance and programming diversity in awarding the grants and favorably considers projects that assist many children and foster diversity and directly involve Optimist Members' participation.

### **Guidelines:**

- Any adult Club served by OIF is eligible to apply for a \$500 grant for a NEW charitable project of the Club.
- The project must start and finish between the assigned dates.
- A representative for every Club awarded a grant must be available at International Convention to receive the check.
- Grants to Clubs will be matching grants, with Clubs expected to show plans for matching the money and reporting the results. Clubs will complete follow-up reports.
- Grants are for one year only.
- Club dues must be current.
- Clubs might consider using the Pass-Through Program to obtain donations from local businesses and foundations.



# Programs

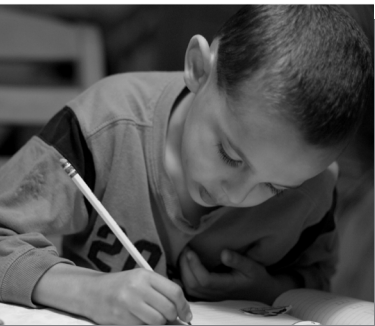
## Pass-Through Program

An Optimist Club seeking grant funds or contributions for funding of charitable community service projects or other charitable, literary or educational programs, may request the assistance of Optimist International Foundation (OIF) as a 501(c)(3) charitable organization.

### Guidelines:

- Complete the grant application online on the Optimist International Foundation's website, or print and mail or fax completed application to the Foundation office.
- Application must be signed by Club President or Secretary/Treasurer.
- If trying to secure a grant from a corporation or foundation that has its own grant application form, please complete any information pertaining to the Club and forward to OIF. OIF will complete the information in regards to OIF and attach any documents that may be necessary. We will mail or fax the completed form and documents to the corporation/foundation.
- Checks received from corporations/foundations must be made payable to OIF. OIF will deposit the check and issue a check to the Club for the amount received. Unless otherwise directed, the check will be sent to the Club officer who signed the application form. A tax receipt can be issued to the corporation/foundation upon their request.
- The Club must report a final accounting of all grant funds received, using the OIF Final Accounting form. OIF cannot proceed with any further Club Pass-Through Grant for the Club until a Final Accounting report is received.

**Please note:** The minimum amount per check qualifying for this program is \$100. OIF cannot process Pass-Through gifts that are in-kind, fixed assets or real estate. Recognition items are not applicable with Pass-Through Grant funds.



# Ways To Give

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## **Unrestricted vs. Restricted**

An unrestricted gift permits the Foundation to use funds where they are most urgently needed and to respond to new opportunities and initiatives as they occur. These gifts fund OI scholarships, Club Grants, and OI programs.

Restricted gifts are designated by the Donor for one or more of the specific programs of Optimist International.

## **Gifts of Cash**

Most gifts to OIF are cash contributions. For the Donors' convenience, OIF also accepts MasterCard, Visa, American Express and Discover (by form or fax, over the phone and online).

## **Gifts of Stock**

When a Donor is ready to transfer ownership of stock to OIF, the Donor may go to the home page of OIF's website and follow the directions after clicking "Donate Stock" or a representative from the brokerage firm may call OIF's office directly for transfer information.

## **Matching Gifts**

Many companies have Matching Gift Programs in which the company will double, and sometimes triple, the amount the employee contributes to a qualifying nonprofit organization. Check with your employer for specific guidelines and appropriate forms.

# Ways To Give

## Honor/Memorial/Veterans Gifts



These gifts are given in honor of a living individual or in memory of a deceased individual, or in honor of an individual that has served in the armed forces. The honoree or a remaining family member is notified, but not of the gift amount. These gifts are the perfect way to remember and recognize someone special.

Clubs are encouraged to recognize outstanding Optimist Members. By making an unrestricted \$100 contribution, Clubs can order Honor, Memorial or Veterans banner emblems that are accompanied by a name bar embroidered with the name of the person being recognized.

## Endowments

Endowments are permanent funds that use only a portion of the earnings for a charitable purpose. The balance of the earnings is invested for growth.

Clubs, Districts or individuals may establish endowments. An endowment must have reached at least \$10,000 and be invested at \$10,000 for a full year before funds are paid out. Funds are paid out once a year in March.



# Ways To Give

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## Scholarships

The Foundation funds all Optimist International Scholarships annually, at a cost of approximately \$400,000. Funding comes from named scholarships and unrestricted gifts, augmented by about \$17,000 from the Pave the Way endowment and \$5,000 for CCDHH Scholarships from the Ames Family Trust endowment.

Making a donation in the form of a scholarship will ensure scholarship longevity. Naming opportunities are available: a five-year \$12,500 commitment with an outright gift will allow donors to name one scholarship in the District for a five-year period, while funding of an endowment with \$50,000 will allow for permanent naming of an Optimist International Scholarship. An endowment may be funded with and an outright gift, an estate gift, or a combination of the two. Please contact the Foundation office for more information.



# Ways To Give

## Planned Gifts

Planned gifts usually come from assets instead of income and allow the Donor to leave a legacy for Optimism. Such gifts may provide substantial tax savings for Donors and their heirs.

A Donor may choose to use one or more of the following planning devices:



# Planned Gifts

### **Bequests**

A bequest is a transfer to the Foundation, by will, of personal property such as cash, securities or other tangible property.

### **Charitable Gift Annuity**

A charitable gift annuity provides income to the donor for life and leaves the remainder to OIF. Some of the annual income from the annuity to the Donor will be taxable.  
*Not available in all states.*

### **Life Insurance**

The gift of life insurance is an affordable way to make a substantial gift. The Donor can irrevocably name OIF as the beneficiary of an existing policy or establish a new life insurance policy in which OIF is the irrevocable owner and beneficiary.

### **Gift of Retirement Fund Assets**

The cost to a donor's estate to give retirement fund assets (like IRA's) to children or grandchildren can be steep. For the charitably inclined, gifting those assets to the Foundation will avoid decreasing these assets.

# Committees

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## Club Grant Committee

The Club Grant Committee is made up of four impartial individuals who review and select the twenty Clubs awarded the \$500 grant towards a new Club project. These individuals select grants based on the guidelines of the Club Grant Program, and work as a team to help fund the best projects each year.\*



## Women's Philanthropy Council Committee

The Women's Philanthropy Council Committee supports the work of the Optimist International Foundation. Members reach out to women as donors and help shape their philanthropy.\*

\* Please refer to [www.oifoundation.org](http://www.oifoundation.org) for a complete listing of names.



"Helping Optimists  
Help Kids"



**Optimist International  
Foundation**

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