



Annual Report

2017

The OACTA Foundation

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**Message From the 2018 OACTA
Foundation President
*Brian D. Kerns***

The OACTA Foundation was created in 2015 to raise funds to generate a perpetual funding source for charitable and educational purposes, including OACTA's annual diversity scholarships and to support the National Foundation for Judicial Excellence (NFJE). The NFJE serves to educate appellate jurists and promote more efficient and equitable administration of justice. The Foundation was kicked off at the OACTA 50th Anniversary Gala and has continued to grow since that time. We are proud of the support the Foundation has been able to provide for the diversity scholarship program and for supporting NFJE the last couple of years. However, our challenge is to grow this fund to the point that it can support other existing, and yet to be determined, causes that coincide with OACTA's mission.

WE NEED YOU! The Foundation has enjoyed financial support from OACTA members, law firms and businesses in addition to benefitting greatly from OACTA's annual golf outing fundraising efforts—but we need members and firms to double down on their commitment to grow this important nest egg. Please consider making an annual giving commitment. Our goal going forward is promote the growth of the funds of the foundation by encouraging and soliciting contributions and gifts. We also seek to establish rational investment growth of the corpus of our funds. This year we are considering the adoption of an investment policy for Foundation and hope to implement this moving forward to insure the sensible management and growth of this important fund.

It has been my great pleasure to serve as the President of the OACTA Foundation this past year. I am very grateful for the work and support of the OACTA Foundation by the officers and the Board of OACTA and its Foundation. Also, a special thank you to David Orlandini, the Annual Golf Outing Chair the last several years for his great work in making that fundraising effort such a great success. And certainly the Foundation owes a great debt of thanks to OACTA Executive Director Debbie Nunner and OACTA's Executive Assistant, Laney Mollenkopf. Debbie and Laney do extraordinary work for this organization and OACTA throughout the years.

**Message from the 2018 OACTA
President
*Jill K. Mercer***

The OACTA Foundation is in its third year and has proven to live up to its mission of funding projects consistent with the mission of OACTA, including educating future lawyers with diverse backgrounds and supporting the education of the judiciary. Specifically, the OACTA Foundation has allowed our organization to generously finance multiple scholarships through its Diversity Scholarship, which has funded 20 scholarships, in all, since its inception in 2011. The recipients of these scholarships over the years have been a very impressive group of students who have expressed tremendous gratitude to OACTA for supporting their future careers in the legal community. I am proud to be part of such an organization that recognizes the value in such an endeavor.

Likewise, the OACTA Foundation has helped to support OACTA's continued yearly donation to the National Foundation for Judicial Excellence (NFJE), which is an organization dedicated to the training and education of appellate court judges from around the country. In fact, OACTA is a leading contributor among all defense bar organizations. This does not go unnoticed by NFJE, who has reached out to OACTA personally to express their gratitude for the generous donation each year. This donation helps NFJE pursue its mission of strengthening and preserving the civil justice system through seminars and scholarly publications.

None of this would be possible without the lawyers, law firms, companies, claims executives, and sponsors that have generously donated to the Foundation. This includes those who participate in the OACTA Golf Outing, which has proven to be a huge success and benefit to the Foundation. Thank you to those who have supported this event over the years, and especially to those who helped to organize and plan. This is no easy task. Likewise, thank you to those that have served on the Diversity Scholarship Committee, who have coordinated, vetted, and chosen a very impressive group of recipients over the last 7 years. Please help OACTA to continue these ventures for the betterment of the civil justice system and join me in supporting this worthwhile cause.

Our Mission

Established in 2015, The OACTA Foundation was organized exclusively for charitable and educational purposes. The Foundation funds projects consistent with the mission of OACTA, such as the annual OACTA Diversity Scholarship Program and the National Foundation for Judicial Excellence (NFJE). The OACTA Foundation is incorporated in Ohio as a 501(c)(3) nonprofit charitable organization under the Internal Revenue Service. Contributions made to The OACTA Foundation are tax deductible to the extent allowed by law. Please consider contributing to The OACTA Foundation. Go to www.oacta.org to make a contribution. Your support is appreciated!

OACTA Law Student Diversity Scholarships

The Ohio Association of Civil Trial Attorneys (OACTA) Law Student Diversity Scholarship program is open to incoming second and third-year African American, Hispanic, Asian, Pan Asian and Native American students enrolled at Ohio law schools. Incoming second and third-year female law students enrolled at Ohio law schools are also eligible regardless of race or ethnicity.

Other criteria for the scholarship include:

- Academic achievement in law school;
- Professional interest in civil defense practice; and
- Service to community and to the cause of diversity;

Currently, up to two (2) scholarships in the amount of \$2,500 each will be awarded to successful applicants. Applicants are required to submit an application, law school transcript and a cover letter addressing the following: academic, personal and professional accomplishments, and why they should be selected as a recipient of the scholarship. Applicants may submit up to three letters of recommendation.

OACTA Golf Outing

Since 2009, OACTA has conducted an annual golf outing. Net proceeds from the OACTA Golf Outing have benefitted the OACTA Foundation since 2016. Since its founding, the OACTA Golf Outing has been held at Pinnacle Golf Club in Grove City, Ohio, in early September. OACTA members, friends and colleagues gather for golf and fun and all for good causes! The Foundation will continue to support the Law Student Diversity Scholarship Awards and the NFJE from proceeds raised by the annual Golf Outing.

Established in October, 2015, the OACTA Foundation is a 501(c)(3) charitable organization based in Columbus, dedicated to supporting OACTA, through its Law Student Diversity Scholarships, the Golf Outing to support the NFJE, and the broader educational and organizational goals of OACTA itself.

In 2016, Jim Mann, Immediate Past President of OACTA, served as the first President of the OACTA Foundation, which partnered with OACTA to host a 50th Anniversary Gala at the Ohio Statehouse in the Atrium and Rotunda. OACTA provided all the logistical and staff support for the event held in conjunction with the OACTA Annual Meeting in Columbus and the OACTA Foundation was the direct beneficiary of all net proceeds from the event. Sponsorships and contributions of \$52,150 helped generate net income to the OACTA Foundation in the amount of \$42,435.02.

2017 marked the first full year in which the entire OACTA Law Student Diversity Scholarship Program and the Annual OACTA Golf Outing were fully administered through the OACTA Foundation, with significant administrative support from OACTA. The personal donations and contribution of individuals are fully eligible for favorable tax deductions for each generous donor to the OACTA Foundation for these and all future OACTA Foundation programs and events.

Since the OACTA Law Student Diversity Scholarships were first awarded in 2011, OACTA and the Foundation have now collectively awarded over \$30,000 in Diversity Scholarships to 20 students. In addition to the Diversity Scholarship Awards, OACTA has been a national leader among all defense bar organizations across the country both in its level of support and total years of support for the National Foundation for Judicial Excellence (NFJE). The NFJE is a unique program among national and state defense bar programs which seeks to train appellate court judges from around the country at an annual seminar held each year in Chicago. Before 2009, OACTA had made annual contributions to the NFJE from its general operating budget. In 2009, OACTA organized a new, fun event for members with its annual Golf Outing. Since its formation, the Golf Outing has generated over \$80,000.

Looking to the future, the goals of the Foundation include a commitment to continue OACTA's historic support for the NFJE, and the continued funding of Law Student Diversity Scholarships, as well as *increasing* both the amount and number of scholarships which can be awarded to deserving law students in the future. Last, but not least, the Foundation exists to serve as a vehicle to receive even more support from existing and future donors who support the above activities and the welfare and existence of OACTA itself.

- Foundation provides scholarships to law students of diverse backgrounds to further their education.
- Foundation provides annual financial support to the NFJE which focuses specifically on education for the state appellate judiciary.
- Foundation will continue to support the mission of OACTA in these and future projects.

The OACTA Foundation is the only organization of its kind led by the Ohio Defense Bar.

As of 12/31/17, the total assets of the OACTA Foundation are \$44,890.35. In 2016, at the 50th Anniversary Gala Event, the OACTA Foundation raised over \$42,000 with the generous support of individual attorneys, law firms, corporations, and sponsors of OACTA. Expenses for 2017 accurately reflect the OACTA Foundation mission – educating future lawyers with diverse backgrounds and supporting the education of the judiciary. Since 2016 was a pivotal year near the inception of the creation of the OACTA Foundation, the main thrust was to create a “nest egg” to build on for future goals and financial stability of the OACTA Foundation. The OACTA Golf Outing is the annual fundraising event and the Law Student Diversity Scholarship Program and NFJE contribution are the annual expenses. A financial review was conducted by a certified public accountant was conducted for the OACTA Foundation, as of 12/31/16 and the results were satisfactory with no modifications suggested. OACTA continues to provide significant administrative and staff support for the Foundation programs.

Description	Revenue	Expenses	Net Income
Golf	\$16,675.00	\$6,361.27	
General Contributions	\$2,475.00		
Diversity Scholarships		\$3,750.00	
NFJE		\$5,000.00	
Operating		\$655.02	
Accounting Fees – financial review		\$1,200.00	
TOTAL	\$19,150.00	\$16,966.29	\$2,183.71

The OACTA Foundation's 2016 activities were properly and formally audited in 2017.

2017 BOARD OF DIRECTORS

President (OACTA Immediate Past President)

John J. Garvey, III
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The Members of the 2017 OACTA FOUNDATION consisted of the 2017 OACTA Board of Trustees.

Thank you to all of our individual and institutional donors who generously contributed to the OACTA Foundation in 2017.

Contributions of \$1,000 or more:

John Garvey, III, Garvey Shearer Nordstrom, PSC

Contributions of \$100 or more:

Brian Kerns, Bonezzi, Switzer, Polito and Hupp
Mark McCarthy, Tucker Ellis LLP
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Contributions of \$25 or more:

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