



# Annual Report

## 2018

### The OACTA Foundation

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**Message From the 2019 OACTA  
Foundation President  
*Jill K. Mercer***

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We are now in the fourth year of the OACTA Foundation, which has lived up to its mission of supporting charitable and educational endeavors in Ohio. This includes the OACTA Diversity Scholarship Program, which will be renamed to the Inclusion and Equity Scholarship in 2019, as well as the National Foundation for Judicial Excellence (NFJE). The strong candidate pool and recipients of the scholarship are consistently a very impressive group of students and we look forward to carrying on this legacy for many years to come. Similarly, OACTA continues to promote judicial excellence by being a top contributor to NFJE each year. We should all be proud of these achievements.

Thank you to all who personally contributed in 2018 and helped to support the Foundation's mission of enhancing and ensuring educational opportunities for all, supporting a strong judiciary, and supporting the goals and mission of OACTA itself. I would like to give a special thanks to Mark McCarthy, who assumed the role as the chair of the OACTA Golf Outing this year and hit a homerun, or should I say shot an eagle? Proceeds from the Annual Golf Outing have supported the OACTA Foundation since 2016. This year's was one of the most successful, to date, and we thank Mark for his hard work and dedication to OACTA.

While we should all be proud of OACTA's contributions, we still need your help. The Foundation is in its early years and the goal is to promote the growth of its funds so that we can continue with our charitable activities and provide even more support in the future. Please consider making a yearly contribution to this worthy (and tax-deductible) cause. We cannot do this without you!

## 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](http://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, OACTA hosted a 50<sup>th</sup> 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 \$45,500 helped generate net income to the OACTA Foundation in the amount of \$80,042.

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 \$27,500 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 12/31/18, the total assets of the OACTA Foundation are \$43,404.88. 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 2018 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 12/31/18 and the results were satisfactory with no modifications suggested. OACTA continues to provide significant administrative and staff support for the Foundation programs.

<b>Description</b>	<b>Revenue</b>	<b>Expenses</b>	<b>Net Surplus</b>
<b>Golf</b>	\$15,310	\$7,236	
<b>General Contributions</b>	\$1,725		
<b>Diversity Scholarships</b>		\$5,000	
<b>NFJE</b>		\$5,000	
<b>Operating</b>		\$549	
<b>Accounting Fees – financial review</b>		\$735	
<b>TOTAL</b>	<b>\$17,035</b>	<b>\$18,520</b>	<b>(\$1,485)</b>

*The OACTA Foundation's 2018 activities were properly and formally audited in 2019.*

# **Pg. 5      Board of Directors/ Past Presidents**

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## **Board of Directors**

### ***President (OACTA Immediate Past President)***

**Brian D. Kerns**

Bonezzi, Switzer, Polito and Hupp  
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### ***Secretary-Treasurer (OACTA Executive Director)***

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Columbus, Ohio

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**Jill K. Mercer**

Nationwide Insurance  
Columbus, Ohio

**James N. Kline**

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Cleveland, Ohio

**Jamey M. Pregon**

American Family  
Columbus, Ohio

**Natalie M. E. Wais**

Young & Alexander Co.  
Cincinnati, OH

*The Members of the 2018 OACTA FOUNDATION consisted of the 2018 OACTA Board of Trustees.*

## **Past Presidents**

**2017 – John J. Garvey, III**

**2016 – James L. Mann**

Thank you to all of our individual and institutional donors who generously contributed to the OACTA Foundation in 2018.

**Contributions of \$100 or more:**

Brian D. Kerns, Bonezzi Switzer Polito & Hupp Co., L.P.A.  
David W.Orlandini, Collins, Roche, Utley & Garner, LLC  
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Natalie M.E. Wais, Young & Alexander, Co.  
Susan Gunter, Dutton Brock LLP  
T. Andrew Vollmar, Bruns, Connell, Vollmar & Armstrong, LLC

**Contributions of \$25 or more:**

Benjamin Sassé, Tucker Ellis LLP  
John J. Garvey, III, Garvey Shearer Nordstrom PSC



**2018 Golf Outing:**

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