



Annual Report

2022

The OACTA Foundation

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**Message From the 2023 OACTA
Foundation President
*Benjamin C. Sassé***

I write with gratitude and pride. Gratitude for the generosity OACTA members and supporters showed in 2022, and pride in the OACTA Foundation's work and the extension of its mission with an additional scholarship promoting a more inclusive and diverse Ohio defense bar.

With your support, the 2022 OACTA Golf Outing, the Foundation's annual fundraising event, was a success. Over fifty golfers helped raise over \$13,000, while celebrating the Foundation and enjoying a day together out of the office. We thank the golfers and sponsors who contributed to this success. We also thank Brigid Heid, the Annual Golf Outing Chair, for her leadership and Mark McCarthy for his continued efforts.

Your generosity allowed the Foundation to continue its support of the National Foundation for Judicial Excellence (NFJE) and expand the number of OACTA Hilary S. Taylor Law Student Inclusion & Equity Scholarships. The NFJE supports a strong and independent judiciary by providing educational programs for state appellate judges, and OACTA has a long history of contributing to this effort. At the same time, the Foundation awards scholarships to law students—scholarships renamed in 2019 as the Hilary S. Taylor Law Student Inclusion & Equity Scholarships in recognition of Mr. Taylor's leadership in establishing the scholarship program. In 2022, the OACTA Foundation was able to add another scholarship, bringing the total available annually to three.

None of this is possible without the lawyers, law firms, claims executives, companies, and sponsors who donate to these worthy causes. Thanks to all who donate their time, money, and talent to the OACTA Foundation and its mission, including the many OACTA members who evaluated and selected the nearly 30 law students to receive Law Student Inclusion and Equity Scholarships since 2011. Giving back to our profession by helping to educate the judiciary and grow a new and inclusive generation of lawyers is a noble goal, and Ohio's civil justice system benefits as a result.

Please help OACTA continue to fund these causes and enhance the civil justice system. Keep the OACTA Foundation in mind each year when you are considering charitable contributions. And a sincere thanks to all of you for the privilege of serving as part of OACTA's leadership team. Have a safe and happy holiday season.

Benjamin C. Sassé

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 Hilary S. Taylor Law Student Inclusion and Equity 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 Hilary S. Taylor Inclusion & Equity Scholarships

The OACTA Hilary S. Taylor Law Student Inclusion & Equity Scholarships are open to the following incoming second and third year law students who are enrolled in an Ohio law school or are a permanent Ohio resident: 1) Minority law students; 2) LGBTQ (Lesbian, Gay, Bisexual, Transgender, Questioning) law students, regardless of race or ethnicity; 3) Female law students, regardless of race or ethnicity; or, 4) Law students from economically impoverished families/backgrounds, regardless of race or ethnicity. The criteria include academic achievements; service to the community and to the cause of inclusion and equity; and experience or interest in a civil defense practice.

Up to three (3) scholarships in the amount of \$2,500 each are 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 must also submit at least one letter of recommendation but may submit a total of three. Applications must be submitted online with a cover letter. Transcripts and letters of recommendation may be mailed to the OACTA office. The completed applications and all other requested material must be received by May 15th.

OACTA Foundation Annual Golf Outing

Since 2009, OACTA has conducted an annual Golf Outing. Net proceeds from the Golf Outing have benefitted the OACTA Foundation since 2016. Since its founding, the 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! Net proceeds from the annual Golf Outing support the Hilary S. Taylor Law Student Inclusion and Equity Scholarships and the NFJE. Since its formation, the annual Golf Outing has generated over \$115,000 (through 12/31/22). In 2022, 55 golfers participated and over \$13,500 was raised for the OACTA Foundation.

Established in October, 2015, the OACTA Foundation is a 501(c)(3) charitable organization, dedicated to supporting OACTA projects, such as the OACTA Law Student Inclusion and Equity Scholarships and the National Foundation for Judicial Excellence (NFJE), and the broader educational and organizational goals of OACTA itself.

In 2016, OACTA hosted 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 helped generate a net income to the OACTA Foundation in the amount of \$42,435.

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 contributions 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.

In 2019, the scholarship program was re-named the Hilary S. Taylor Law Student Inclusion and Equity Scholarship, in honor of Mr. Taylor who provided leadership in OACTA's efforts to establish and implement the OACTA Diversity Scholarship. OACTA provided Mr. Taylor this recognition, in-person, at the November 2019 Annual Meeting. Since the OACTA Law Student Inclusion and Equity Scholarships were first awarded in 2011, OACTA and the Foundation have collectively awarded \$50,000 in scholarships to 32 students (as of 12/31/22). In addition to the Hilary S. Taylor Inclusion and Equity 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. The annual Golf Outing began in 2009 to fund these projects and since 2016, net proceeds fund the annual Golf Outing fund the OACTA Foundation.

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 Inclusion & Equity 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 12/31/22, the total assets of the OACTA Foundation are \$56,598. 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 2022 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 Foundation Golf Outing is the annual fundraising event and the Hilary S. Taylor Law Student Inclusion and Equity Scholarship Program and NFJE contribution are the annual expenses. OACTA conducts an audit every-other year, alternating between a full audit and a financial audit review. When this is conducted, the OACTA Foundation is included in the process. OACTA continues to provide significant administrative and staff support for the Foundation programs.

DESCRIPTION	REVENUE	EXPENSES	NET SURPLUS
Golf	\$22,850	\$9,270	
General Contributions	\$3,245		
Inclusion & Equity Scholarships		\$7,500	
NFJE		\$3,000	
Operating / Banking & Credit Card Fees		\$1,103	
Accounting Fees		\$935	
Interest / Dividends	\$562		
TOTAL	\$26,657	\$21,808	\$4,849
Unrealized Investment Gain (Loss)			(\$2,736)

Pg. 5 Board of Directors/ Past Presidents

2022 OACTA Foundation Board of Directors

President (OACTA Immediate Past President)

Natalie M.E. Wais

Young & Alexander Co. LPA
Cincinnati, Ohio

Secretary-Treasurer (OACTA Executive Director)

Debbie Nunner

Executive Director of OACTA
Columbus, Ohio

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Bonezzi Switzer Polito & Hupp Co., LPA
Cincinnati, Ohio

Elizabeth T. Smith

Vorys Sater Seymour & Pease
Columbus, Ohio

The Members of the 2021 OACTA FOUNDATION consisted of the 2021 OACTA Board of Trustees.

OACTA Foundation Past Presidents

2021 – Jamey T. Pregon

2020 – James N. Kline

2019 – Jill K. Mercer

2018 – Brian D. Kerns

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 2022.

Contributions of \$2,000 or more:

Tucker Ellis LLP
Weston Hurd LLP

Contributions of \$1,000 or more:

John J. Garvey, III
Lexitas

Contributions of \$500 or more:

Eastman & Smith
Mark & Karen McCarthy
Jill Mercer
Rimkus Consulting Group, Inc.
Technology Concepts & Design, Inc. (TCDI)
Young & Alexander Co., LPA

Contributions of \$250 or more:

Cavitch, Familo & Durkin Co., LPA
Collins, Roche, Utley & Garner, LLC
Explico Engineering Co.
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Garvey Shearer Nordstrom PSC
Grange Insurance
Peter Hersha
Rudick Forensic Engineering
Elizabeth Smith
S-E-A
Subashi, Wildermuth & Justice
Sutter O'Connell
Veritext

Contributions of \$100 or more:

Thomas Glassman.
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Contributions of \$25 or more:

Douglas Holthus