



Annual Report

2023

The OACTA Foundation

400 W Wilson Bridge Road, Suite 120, Worthington, OH 43085
Tel: 614.228.4727 | Fax: 614.221.1989
oacta@assnoffices.com | www.oacta.org

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**Message From the 2024 OACTA
Foundation President
*David W. Orlandini***

Dear Friends and Supporters,

As we reflect on the journey of The OACTA Foundation since its establishment in 2015, we are thankful for the generous support from OACTA's members and sponsors. Our mission—to promote inclusion, equity, and education within the legal profession—continues to drive us forward as we strive to make a meaningful impact in the lives of deserving law students and the judiciary.

One of our proudest achievements has been the annual OACTA Hilary S. Taylor Law Student Inclusion and Equity Scholarships. Since 2011, we have awarded \$50,000 to 32 talented students from diverse backgrounds. These scholarships inspire the recipients to pursue their legal education and contribute to a more inclusive legal profession. In 2023, we awarded three scholarships of \$2,500 each, and we look forward to expanding this program in the years to come.

Our commitment to supporting the National Foundation for Judicial Excellence (NFJE) has also set us apart. Through your contributions, we have helped NFJE to educate appellate judges nationwide, enhancing the quality of our judiciary and ensuring that justice is upheld at the highest levels.

The success of the OACTA Annual Golf Outing, which has raised over \$130,400 since 2016, exemplifies the strength of our members and sponsors coming together for a common cause. This event not only fosters camaraderie among OACTA members but also directly benefits our scholarship program and NFJE contributions.

Looking ahead, we are dedicated to increasing our scholarship program and advancing the Foundations continued support of the judicial system. I invite you to join us in this important work. Your contributions are essential to our mission and are tax-deductible to the extent allowed by law. Together, we can continue to make a difference in our community and empower the next generation of legal leaders.

Thank you for your support and commitment to The OACTA Foundation.

David W. Orlandini

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 \$130,400 (through 12/31/23). In 2023, 80 golfers participated and over \$15,200 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 12/31/23, the total assets of the OACTA Foundation are \$63,965. 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 2023 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	\$30,175	\$14,926	
General Contributions	\$2,670		
Inclusion & Equity Scholarships		\$7,500	
NFJE		\$3,000	
Investment / Banking & Credit Card Fees		1,006	
Accounting Fees		\$1,285	
Interest / Dividends	\$603		
TOTAL	\$33,448	\$27,717	\$5,731
Unrealized Investment Gain (Loss)			\$1,636

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2023 OACTA Foundation Board of Directors

President (OACTA Immediate Past President)

Benjamin C. Sassé

Tucker Ellis, LLP
Cleveland, Ohio

Secretary-Treasurer (OACTA Executive Director)

Debbie Nunner

Executive Director of OACTA
Columbus, Ohio

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Cincinnati, Ohio

Elizabeth T. Smith

Vorys Sater Seymour & Pease
Columbus, Ohio

Daniel A. Richards

Weston Hurd LLP
Cleveland, Ohio

The Members of the 2023 OACTA FOUNDATION consisted of the 2023 OACTA Board of Trustees.

OACTA Foundation Past Presidents

2022 – Natalie M.E. Wais

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 2023.

Contributions of \$3,000 or more:

Tucker Ellis LLP
Weston Hurd LLP

Contributions of \$1,000 or more:

Cavitch, Familo & Durkin Co., LPA
Collins, Roche, Utley & Garner, LLC
Garvey Shearer Nordstrom PSC
Reminger Co., LPA

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Contributions of \$250 or more:

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Contributions of \$100 or more:

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Natalie M. E. Wais

Contributions of \$25 or more:

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