

2024 Annual Report for the Lycoming Law Association Foundation

Foundation Meeting and Governance: The expanded 9-Member Board continued to meet Quarterly in person and intermittently when necessary. The 2024 Board Members were: Judge Skip Arbuckle, Fred Holland (Treasurer), Paul Roman, Julieanne Steinbacher, Sean Gingerich (Secretary), Adrian Lee, Robin Read (President), Joy McCoy (President of the LLA) and Judge Ryan Gardner (President Elect of LLA).

Foundation's Charter and Mission: Since its organization in 1989, the Foundation has served as the giving arm of the LLA. The Foundation's Charter and Mission is to educate the general public about, and promote improvement in, the legal process and jurisprudence.

Fund Management: Woodlands Bank continued to manage the Foundation's funds in 2024 and the Board met with representatives of the Bank on October 23, 2024 to review the account and investment strategy. The Board continued the historical conservative investment policy and continued with the goal to increase the principal to the level wherein the interest, dividends and gains can be utilized to fund grants without invading the principal.

Fund Raising: The Foundation initiated its Fund Raising Campaign at the LLA annual meeting in January, 2024 with four commitment levels for donors: Young Lawyer (\$150), Life Advocate (\$500-\$1,000), Rising Sun Society Contributor (\$1,000-\$2,500), and the Joseph C. Rider Society (\$2,500 or more). Donations can be paid in a lump sum or over multiple years. The Foundation received payments and/or multiple-year commitments from eleven members as follows:

- Young Lawyer
 - Adrian M. Lee
 - Jon DeWald
- Life Advocate
 - J. Howard Langdon
 - Fred A. Holland
- Rising Sun Society
 - Honorable Richard A. Gray
- Joseph L. Rider Society
 - Paul A. Roman
 - Honorable William "Skip" Arbuckle
 - Robin A. Read
 - Julieanne E. Steinbacher
 - Honorable William P. Carlucci
 - Honorable Christian D. Frey
 - Joy Reynolds McCoy

The Foundation Board will continue its fundraising efforts in 2025.

Donations of Note for 2024: The Foundation received multiple donations in memory of LLA members who died in 2024. Also, Barbara Rider donated \$3,000 in memory of Joseph L. Rider. Additionally, Robin A. Read donated her \$1,000 Nichols Service Award to the Foundation designated for scholarships.

Matching Funds from the Pennsylvania Bar Foundation: The Foundation made application to the Pennsylvania Bar Foundation for matching funds for its grant to the Young Lawyers Division of the LLA for the Wills for Heroes event. Said application was approved and the Foundation received \$1,000 from the Pennsylvania Bar Foundation. Additionally, the Board made application for matching funds for its seven scholarships (below), but has not received a decision thereon to date.

Adoption of the Joseph C. Rider Scholarship Fund: In 2023, the Board voted to implement an annual program to fund up to three \$1,000 scholarships to Lycoming County residents attending law school and named it in honor and memory of Joseph L. Rider. Although originally limited to three scholarships a year, the Board voted to award seven scholarships in 2024 due to the popularity of the program. \$1,000 scholarships were awarded to Hannah Anderson (Temple University Beasley School of Law); Eli Will (Drexel Kline School of Law); Joshua Michael Dinges (Widener University Commonwealth Law School); Abigail McCoy (Franklin Pierce Law School); Grace Kathryn Boos (Penn State Law School); Emily Wolfgang (Widener University Commonwealth Law School); and Francesca Patetta (Rutgers Law School—Camden).

Formula for calculating available funds for Granting and Funds Available for Granting: In 2024, the Board followed the same formula historically adopted for calculating the Maximum Allowance of funds available for grants, to wit: 4% of the net (gross less fund expenses) fund balance at the year-end of the previous year, plus any carry over of remaining funds from the previous year.

Grants Awarded: In 2024, the Foundation awarded the following grants:

- a) \$10,280 to North Penn Legal Services which was 80% of the \$12,850 Arbitration Fees donation by LLA members. This is consistent with the Foundation's historical award to North Penn Legal Services of Arbitration Fees with the Foundation retaining 20% of the donated Fees as Administrative Expenses.
- b) Based on the recommendation of the Outreach Committee, the Board voted to award the LLA Young Lawyers Division \$1,000 to fund the Wills for Heroes program.
- c) Based on the recommendation of the Outreach Committee and after receiving additional information, the Board voted to award up to \$6,500 to the Bar History Committee of the Lycoming Law Association for the development and presentation of an exhibit at the Thomas T. Taber Museum titled "Law and Justice in Lycoming County and the Lawyers and Judges Who Make it Work".

2025 Scheduled Meeting Dates: The Foundation plans to meet Quarterly again in 2025 with scheduled meeting dates of January 22nd, April 23rd, July 23rd and October 22nd at noon at the LLA office.

Special Thank You: Once again, the Foundation Board thanks LLA Executive Director Michele Frey for her continued assistance in 2024 and for her eternal enthusiasm and optimism for the Foundation's operations and goals. The Board also thanks the Members of the Outreach

Committee who vet the Grant Awards Applications and provide the Foundation Board with recommendations on funding each Application.

Respectfully Submitted,

Robin A Read, LLA Foundation President