



We Prefer to Refer

The ADTA was founded more than seventy-five years ago as a group of elite trial lawyers who would get together once a year – initially also with their Insurance Company clients – to promote both professional and business relationships. Importantly, membership also included a listing in the *ADTA Roster* which was mailed to thousands of companies who comprised the primary client base of the individual members. The idea was a simple one. If a client needed counsel in another jurisdiction, he could refer to the *Roster* and, because the attorneys listed therein (who had the exclusive listing in their particular city) had been vetted before they were allowed to be members, the client could be assured that he would be receiving quality representation.

However, as trial practice became more “regional” and the ADTA evolved to reflect that change, a simple listing in the *Roster* generated fewer and fewer referrals, and the leadership struggled to find ways to enhance the value of ADTA membership. Those of us who regularly attended the annual meetings recognized that a primary benefit of being a member was the opportunity to establish lasting personal relationships which, more often than not, ultimately also resulted in business referrals. The issue, however, was how to best communicate this fact to our members. Thus was born the *We Prefer to Refer* program.

The idea included efforts to acknowledge those members most actively involved in referring work to other Association members, including the selection of one of those lawyers to receive the “*We Prefer to Refer*” crystal trophy at each annual meeting. This new client referral network initiative also involved publication of client and work referral “success stories” in the *Association Press*. In 2009 the Marketing Committee “rolled out” the program to the full membership of the ADTA. The nomination and selection process were finalized and members were encouraged to participate by nominating their key ADTA referral sources.



The nominees for the initial award included Bobby Hood, Fred Raschke, Kevin Kelly, James Jennings and Doug McIntosh. When the jury returned its verdict it was that Bobby's name should grace the first position on the WPTR permanent trophy. Under the leadership of first Dan Balmert, then Ed Birk, and finally Jim Craig, the program continued to evolve and expand, including a competition to name the award, which was eventually designated "The Strubinger Trophy", in honor of Bert Strubinger, the first President of the ADTA. A highlight of the Ponte Vedra meeting was the presence of Mr. Strubinger's daughter to present the trophy



Since its inception the Strubinger has been awarded to Bobby Hood (2010), Doug McIntosh (2011), Fred Raschke (2012), Jean Lawler (2013), Matt Bailey (2014), David Zizik (2015), Steve Gurnee (2016), and Dan Balmert/ Bob Tait (2017).

The Creation/Re-Invigoration of Committees

Throughout our history the ADTA has been run by volunteer members, and even with the addition of an Executive Director this has remained much the same. Although we elect a new President every year, members who hold the positions of Secretary and Treasurer are usually "re-elected" multiple times. In 2009, Secretary George Walker

was succeeded by Dan Balmert who, in turn, was followed in that role by Tom Hurney (2012), Pam Treadwell-Rubin (2015), and Dyan Ebert (2017). For reasons of continuity, the office of Treasurer is traditionally held for an even longer time, as was the case with Bob Tait (2002-2007), Matt Bailey (2007-2013) and our current Treasurer, Ed Birk.

Conversely, although the ADTA has always had various Committees, historically only two really played an active role in running the organization: the Membership Committee, mentioned previously, and CLE Committee, which until recently has only ever had two Chairmen, Tom Sandenaw and Kevin Amatuzio, but was responsible for the individual State-Accreditation of the Continuing Legal Education presented at each annual meeting.



However, the past few years have seen both the creation of new committees and the reinvigoration of existing ones, so that the organization now more and more depends on member committees for everything from policy recommendations to the investment of our funds.

Under the leadership of Pam Treadwell-Rubin, a “Committee on Committees” was created to evaluate and modernize our Committee structure to make our Committees more relevant to, and active in, the operation of our Association. The result, among others, was the creation of the Annual Meetings Committee, to not only assist Peggy Schultz and the convention hosts in running the meeting, but to perform a post-convention critique and make recommendations for changes or improvements. Along the same lines, the Spouses Committee, originally created for the Boston meeting, evolved into the Red Carpet Committee whose primary job is to welcome and provide interesting programs and activities for the non-lawyer spouses and guests attending our meetings. The External Marketing Committee and National Issues Committees are charged with providing substantive information to our members, keeping them apprised on legal developments that could impact their practice and, where appropriate, recommending to the Executive Council that the ADTA take a formal position on an issue of importance to the defense community.

The Finance Committee was established in 2013. Historically, it was the responsibility of the Treasurer

to oversee all ADTA finances and evaluate funding requests, etc. However, with the reinvigorating of Committees, the need to expand our technological capacity and other likely requests for funds, it was decided that this oversight function should instead fall to a Committee of experienced ADTA members, and that the Chair – who to date has been either a Past-President, a Past-Treasurer or both – should be made a non-voting member of the EC. Since its inception, the Finance Committee has created and implemented an Investment Policy, established a “Conflict of Interest Waiver” for all ADTA leadership, updated and expanded our insurance coverage, and otherwise worked with the Treasurer and Executive Director to assure that we remain fiscally responsible to our membership.

Finally, President Fred Raschke created a Past-Presidents Committee – to periodically communicate with all Past-Presidents and solicit their comments and suggestions -- and an “Out of the Box” Committee to simply “brainstorm” ideas. Our leadership understands that in this ever changing legal and social environment, the ADTA cannot afford to “stand still”, and continues to strive to do everything possible to bring value to our members and retain our place as the premier defense trial lawyers association.

Not Your Father’s ADTA

As has been the case with our profession – from computerized filing, to skype depositions, to the all-electronic courtroom – the past decade has also seen the ADTA move into the Twenty-First Century. With suggestions from the Internet and Technology Committee and under the wise direction of Peggy Schultz, our website has been completely revamped to be more informational and user-friendly. The *Handbook* and *Directory* are no longer published annually in hard-copy and mailed to our members, but are instead available on the website, where they can be constantly updated. The “Find an Attorney” function, available to all site visitors, not only includes a personal profile that can be edited by our members, but also links to each individual attorney’s email and law firm website. You can now find the ADTA on Facebook, LinkedIn, and Instagram, and we now provide our members with the convenience of paying their dues and meeting registration fees with a credit card.



For the past several years, the Webinar Committee has produced and presented numerous educational programs available to all member firms, and the recent creation of “ADTA Talks” -- where no reservation is required and you can simply dial-in -- provides the periodic opportunity to connect with fellow members and participate in a discussion on a topic of current interest. Recent subjects have included everything from marijuana law, to an election post-mortem, to the independence of the judiciary. In addition, through our email database we now provide a platform where members can secure information such as experience with experts, judges, opposing counsel and any number of inquiries that can aid their practice.

Finally, first under the supervision of Linda Hay, then James Holland, and now Doug Dooley and Elizabeth Fleming, the *Association Press* has been revamped, modernized and expanded. Published semi-annually and available both on our website and in hard copy sent to the homes of our members, the *Press* provides a variety of information about meetings, new members, committee workings and the general happenings of the Association, as well as numerous photos of members enjoying themselves at our most recent convention.

Leadership and The Increasing Relevance of the ADTA

During the past two decades we have elected Presidents from the East: Kevin Kelly (NY) and David Zizik (MA); the South: Russ Roberts and James Jennings (VA), Jerry Weedon (FL) George Walker (AL), Matt Bailey (LA), Fred Raschke (TX) and James Holland (MS); the West: John Clifford (CA) and Lori Berke (AZ) ; the Midwest: Jeff Peterson (MN), Bob Tait and Dan Balmert (OH), Steve Crislip and Tom Hurney (WV), and Gordon Broom, Dan Formeller and Steve Heine (IL); and Frankie Colon-Pagan from Puerto Rico. They’ve come from both small and large firms, and have not only led the Association in exemplary fashion, but they, and their spouses, have represented our organization in such a way that the ADTA has become an increasingly respected and relevant part of the defense bar.



(Caption: From left, Past Presidents Gordy Broom, Bob Tait, Steve Heine, George Walker, James Jennings, Steve Crislip, Bobby Hood, Jerry Weedon, Kevin Kelly, Frankie Colon, Russ Roberts, John Clifford, Dan Formeller, and Doug Hofmann.

In addition to presiding over the EC and Annual Meeting, our President and President-Elect are charged with representing that ADTA at the meetings of the other primary international defense-lawyer organizations. The ADTA, along with the Federation of Defense and Corporate Counsel (FDCC) and International Association of Defense Counsel (IADC) constitute the premier invitation-only associations of defense trial lawyers. As noted, in 1962 the Defense Research Institute (DRI) – which with its 22,000-plus members rightly calls itself the “Voice of the Defense Bar” – offered the ADTA, FDCC and IADC each a seat on its National Board of Directors. While over the years the number of Board seats for each group has increased to three, (President-Elect, President, and Immediate Past-President), for much of that time those Board positions were largely “ceremonial”. However, that is clearly no longer the case. ADTA officers have served on DRI commissions, been involved in the drafting of DRI positions and whitepapers, and have even been selected to serve as the only “outsider” on the DRI National Nominating Committee. Moreover, our President now speaks at every DRI annual meeting.

In addition, for a number of years now the ADTA President and President-Elect, along with their counterparts from our “sister” organizations, have been members of the American Civil Trial Bar Roundtable, a group composed of every major trial lawyer association in the country -- including the ABA, the American Association for Justice, ABOTA, the American College of Trial Lawyers, and the International Association of Barristers -- who meet for a day semi-annually to discuss ways to improve our American system of justice.

The More We Change, The More We Stay the Same

As those of us who are members of our sister defense organizations or have had the honor to represent the ADTA at the “sister” meetings soon realize, there is nothing like an ADTA meeting for camaraderie, lasting memories,

and just plain fun. Current President Tom Hurney likes to recall advice he was given by his former partner and Past-President Steve Crislip when Tom was first elected to the Executive Council – “whatever you do, don’t change a thing” – and even though we’ve needed to adapt to the changing landscape of the profession, this sentiment continues to represent the underlying philosophy of our Association.

The Conquistador Resort and Golden Door Spa in Puerto Rico was the site of our 2006 meeting. Sun, sand, and, of course, golf entertained us, but the highlights of the meeting were the Bioluminescent Kayaking Tour, and the Saturday night dinner in a real Rain Forest. The CLE featured, among other things, a preview of “e discovery”, something that was to become the bane of the defense trial practice in the coming years.



The 2007 Meeting was at the famous Torrey Pines Resort in La Jolla, California and not only featured a visit to the San Diego Zoo, but a hospitality suite – complete with grand piano – that overlooked the 18th green of the South Course, home of the annual PGA tournament and site of Tiger Woods last major, (the 2008 U.S. Open). However, especially for the ladies, the highlight of the meeting had to be our visit to the U.S. Naval Air Station at Miramar, where we got to visit the flight line and spend the evening in the Officers Club with an impressive group of “Top Gun” pilots, all who looked like Tom Cruise!



2008 saw us visit the historic Charleston Mills House Hotel where we were regally hosted by the Hood clan. In addition to enjoying a wonderful combination of history lesson and southern hospitality, those who participated in the golf tournament at the Patriots Point Links were treated to electronic screens on their carts that, in addition to showing the distance to the green, provided a “real-time” tournament leaderboard. The meeting concluded with a truly

elegant, but raucous Black-Tie at Hibernian Hall.



In 2009, the ADTA family traveled to the desert and the Scottsdale Kierland Resort. Among the many highlights was an evening at the Desert Botanical Garden which featured a stunning collection of Chihuly glass. The meeting was also noteworthy for our group being evicted from our Hospitality Suite. Not to worry, however, as President Kevin Kelly stepped up and transformed his room into our famous after-hours gathering place.



As reflected in the *History*, for the first thirty-plus years of our existence, annual meetings were always held in large cities, and in 2010 we returned to our roots. The Boston meeting, steeped in revolutionary history, was memorable for many things, but the highlight was undoubtedly the Thursday evening Lobster Gala/Dance at the John F. Kennedy Museum.



2010 also saw Bill Staples replace Glenn Morgan as Membership Chair.



Flanked by his wife Betsy, Glenn Morgan receives the Paul Gibbs Outstanding Member Award from President Bob Tait

The Boston meeting also saw the return of the “Pre-trip”. When we met in Dublin in 2004, Kevin and Gail Kelly reasoned that since many of our number would be traveling to Europe for more than the four days of our meeting, it would make sense to offer a pre-trip where members could tour Ireland, play golf if it was their fancy, and generally get a head-start on the festivities. That pre-trip was a tremendous success and, under the able direction Mike Aylward, it was reinstated for the Boston meeting. Prior to arriving in the big city, Mike and thirty or so others toured Newport and other New England sites. Since that time, when the venue is appropriate, we’ve offered either a Pre-trip or Post-trip to enhance the meeting experience, including sojourns to Victoria Island, San Simeon and the Hearst Castle, and the latest excursion, “Blues, Culture & Southern Food” through the Mississippi Delta from Nashville to Memphis.



In 2011, the ADTA went to Maui – need we say more? After a hiatus of 30 years, “paradise” again beckoned, and the Sheraton Ka’anapali Beach Resort – complete with a poolside hospitality suite -- did not disappoint. From the “sunset” President’s Reception on the Ocean Lawn, to our party at the Maui Ocean Center, to the rockin’ “Aloha” Dinner-Dance, the ADTA family enjoyed a meeting like no other, and all promised to return sooner than later.



Speaking of “Rockin” – as in our Saturday night entertainer, Host Matt Bailey’s friend Rockin Ducey - 2012 found the ADTA at the Royal Sonesta in the New Orleans’ French Quarter. The Bourbon Balcony Hospitality Suite overlooked the famous avenue of excess, and it became perhaps the most populated Hospitality Suite in ADTA history. However, without a doubt the highlight of the meeting was our night at the World War II Museum, where we experienced both the somber history of the world’s greatest conflict, and the upbeat 40’s nostalgia of the Andrews Sisters. Then President George Walker has never been the same!



Leadership is ever cognizant of the “budgets” of our members and, as a result, The Greenbrier has always been just slightly out of our reach for a meeting. However, a wonderful confluence of events in 2013, not the least of which was Steve Crislip’s friendship with the world-class Resort’s new owner, brought it within most of our price-ranges and ADTA Nation came in droves. Four golf courses, the Sporting Club, Afternoon Tea, a private Casino, and 5-Star Restaurants were just a part of the Greenbrier’s elegance and charm. A private tour of the secret Cold-War Bunker located beneath the Resort was fascinating, but perhaps the highlight was “Project Orange”, hosts Tom and Julia Hurney’s unparalleled Hospitality Suite.





2014 saw us return to Vancouver, B.C. where we first held a meeting in 1986. Vancouver hosted the Winter Olympics in 2010 and, for that event, Fairmont constructed its ultra-modern Pan Pacific Hotel which served as our base. Not only was the waterfront and Olympic Park (site of the Olympic flame) right at our doorstep, but we were in the heart of the Vancouver shopping district. However, the Vancouver meeting will always be remembered for an event that was not on the schedule. During our Dinner/Dance at the Convention Center we experienced an earthquake! Fortunately, no damage was done, and the party continued unabated.



The Vancouver meeting also saw the beginning of a new ADTA tradition. We have always been fortunate to count a number of Past-Presidents among our annual attendees – some long after they have reached Emeritus status. As part of embracing our new members/first time attendees – in addition to a pre-meeting call from an EC member, a “convention host”, and special first night cocktail reception, at the opening session each new member was introduced and personally greeted by all present Past-Presidents, as just a further way of saying “welcome to the ADTA family.”



In a previous survey our members expressed a strong preference for holding meetings at resort locations and, responding those wishes, the 2015 meeting was held on Ponte Vedra Beach. With most rooms facing the Ocean and another beachfront hospitality suite, members were treated to outstanding CLE while they and their families relaxed in the Florida sunshine. Ponte Vedra is also the headquarters of the PGA Tour, and a true highlight was the Cocktail/Dinner/Dance at the Tournament Players Club, (home of the annual Players Championship), complete with paintings of golf greats Arnold Palmer, Jack Nicklaus and Tiger Woods, a tour of the official “President’s Cup” Room and a display of golf clubs from each past-Champion.





Showing that we've come a long way from our modest Mid-Western roots, the "75th Anniversary" meeting was held at the Monterey Plaza and Spa on Cannery Row in Monterey California. The famous Monterey Aquarium, golf on the Peninsula at Poppy Hills, and a spectacular Black-Tie at Clint Eastwood's ultra-private Tehama Golf Club were all features of the meeting. However, 2016 also offered something more.





ADTA meetings have always been known for relevant and timely CLE, but Monterey added another dimension. Dr. Bennett Omalu, subject of the Will Smith movie “Concussion” and the physician primarily responsible for diagnosing Chronic Traumatic Encephalopathy (CTE) in football players related his inspiring story, after counsel for both sides discussed the pending class-action against the NFL.



– complete with a night at the *Wildhorse Saloon* and our first ever “Boots and Tails” Gala – welcomed us in 2017. The Hermitage, Broadway “Honky-Tonk”, and CLE that featured everything from 6th Circuit Court of Appeals Judges to tequila tasting brought a record number of new members/first-time attendees. Yet for many, the highlight was our Saturday morning program of lawyer/author Herbert Crouch, Country Music Association President Sarah Trahern, and finally her special guest, singer/songwriter Barry Dean, complete with his performance of what may henceforth be the ADTA Theme Song, *Day Drinkin’*.





2018: Austin, Texas

Our Texas members made us promise to “Keep Austin Weird” and, as usual, ADTA Nation did not disappoint. The 2018 meeting, held at the new Austin Fairmont Hotel, featured everything from the rooftop bars on Sixth Street to the LBJ Presidential Library where, among myriad other things, you could listen to a tape recording of the touching conversation between then President Johnson and Jackie Kennedy, a mere week after the assassination. We spent Thursday evening exploring the Bullock Texas History Museum, while dancing to the beat of the Jazz Pharaohs, and culminated our get-together with a “Denim” Black-Tie. Perhaps the highlight, though, was Saturday morning where we first heard from actor/voice-management specialist, Eliza Jane Schneider that “*what we say*” may not be as important as “*how we say it*”, and then from the Director of the MIT AgeLab, Joseph Coughlin about the characteristics of Generations Y and Z, and the fact that “*they probably won’t be listening anyway!*”!



2019: Saint Andrews, Scotland

Our Association was founded in 1941, but its history pales in comparison to that of the venue for our 2019 gathering, Saint Andrews, Scotland. Bracketed between a spectacular Scottish-golf pre-trip and a post-trip to London, our meeting began with a day in Edinburgh and an afternoon cocktail party at historic Edinburgh Castle. Then it was on to the birthplace of golf and the Fairmont St. Andrews. We toured wineries, visited St. Andrews University – the third oldest in the English-speaking world, strolled through the ruins of the first Cathedral (built in 1158), and of course, basked in the atmosphere of the Old Course, including for many of us, a mandatory photo on the Swilcan Bridge. A trip to Falkland Castle and Glamis Palace was followed by dinner at Discovery Point and a tour of the HMS *Discovery*, the first ship to explore Antarctica. Finally, our Scottish adventure concluded with one of the most memorable evenings in ADTA history: a formal dinner dance with the men in kilts and the ladies in tartans.







2020: Denver (Virtual)

For many years Kevin and Alice Amatuzio insisted that we needed to experience their hometown, and everyone looked forward to exploring Denver and its environs. Unfortunately, COVID 19 happened and, like everything else, our plans were dashed! Undeterred, President Lori Berke, Executive Director Peggy Schultz, and a host of others worked their magic so that we could have our first (and hopefully last) *Zoom* Annual Meeting. Not only was there our normal outstanding CLE but, in true ADTA fashion, cocktail receptions, entertainment, and our traditional camaraderie – albeit all over a computer screen. Still, what was clearly a labor of love by all involved made it the next best thing to being there.





2021: Asheville, North Carolina

Proving the adage that absence really does make the heart grow fonder, when we were “finally” able to have another in-person meeting, the ADTA family showed up in droves. The historic Grove Park Inn hosted our reunion, which began with a reception overlooking the Blue Ridge Mountains. There were tours of the Biltmore Estate, ziplines and white-water rafting, and dinner at Taylor Ranch with entertainment by the *WhiteWater BlueGrass Band*. The CLE featured, among other things, Dan Kolhane’s moving personal story of the importance of “The Rule of Law”, but the highlight was undoubtedly the “Roaring Twenties” themed dinner/dance, where nearly everyone got in the spirit with gangster and flapper costumes. Unfortunately, the meeting turned out to be a *COVID spreader*, but for most who attended, that was trumped by the sheer joy of just being together again.



2022: Napa Valley, California

In a fitting return to our traditional April timed Annual Meeting, the ADTA Nation was well represented at the Silverado Resort and Spa. The agenda involved everything to do with wine. Our ADTA members experienced a bicycle wine tour, wine blending, a pizza competition in a vineyard, bocce and pickle ball tournaments, a round of golf on a PGA golf course, and of course, many tours of vineyards. Our Thursday night reception, dinner and dance took place at the historic Christian Brothers Winery which now serves a Culinary Institute of American cooking school where we were able to enjoy appetizers prepared before us by burgeoning chefs while enjoying cocktails in their teaching kitchen. Even our CLE which focused on wine with fabulous stories from winemakers which including the origin of the smuggled, famous Bordeaux root stock. President Jamie Hood and his wife Katy provided for a memorable experience which culminated in a gala dinner and dance and casino night.





The ADTA Family

From its modest beginnings in 1941 – as “an attempt to put together the efforts of several individuals and firms to jointly entertain insurance clients” – to the wide reaching diverse organization that you see today, the ADTA has evolved for the betterment of its members and our justice system. Our Mission Statement refers to us as “a select group of diverse and experienced civil defense trial attorneys whose mission is to improve their practices through



collegial relationships, educational programs, and business referral opportunities, while maintaining the highest standards of professionalism and ethics”, and certainly our Association is every bit of that. But for those of us who have been privileged to be active in our group, the ADTA is so much more.

For a large segment of our members, the ADTA is a “second family” and our annual gatherings are as much reunions as they are business meetings. Our spouses and significant others play an integral role in convention planning and are as much a part of the organization as the members themselves. We should all be proud of what the ADTA has become and, with the help and participation of our members, it can only get better in the future.

Your Author

Before his retirement in 2016, Robert E. “Bob” Tait practiced with the Columbus, Ohio law firm of Vorys, Sater, Seymour and Pease, LLP. During his 43 year career, he tried nearly 200 cases to verdict, including a four-month personal injury case – an ADTA referral. In 1988, as relative young lawyer, he had the rare privilege of arguing before the United States Supreme Court.

Bob and his wife Donna attended their first ADTA meeting in 1986, and have not missed a meeting since that time. First elected to the Executive Council in 1992, Bob has held numerous leadership positions including Treasurer (2002-2007) and President (2009-2010). He served as the initial Chair of the Finance and Investment Committees and was our first Historian.

