

Utah State Bar®



2021–22

Summary of Operations

Vision of the Utah State Bar

A just legal system that is understood,
valued, and accessible to all.

Mission of the Utah State Bar

Lawyers serving the public and legal profession
with excellence, civility, and integrity.



Utah State Bar Statement on Diversity & Inclusion

The Bar values engaging all persons fully, including persons of different ages, disabilities, economic status, ethnicities, genders, geographic regions, national origins, sexual orientations, practice settings and areas, races and religions. Inclusion is critical to the success of the Bar, the legal profession and the judicial system.

The Bar shall strive to:

- Increase members' awareness of implicit and explicit biases and their impact on people, the workplace, and the profession;
- Make Bar services and activities open, available, and accessible to all members;
- Support the efforts of all members in reaching their highest professional potential;
- Reach out to all members to welcome them to Bar activities, committees, and sections; and
- Promote a culture that values all members of the legal profession and the judicial system.

Introduction & Grants of Authority

The Utah State Bar operates under authority granted by the Utah Supreme Court through orders which restate the Court's inherent authority under the Utah Constitution to regulate the practice of law. Those orders confirm the specific purposes, duties and responsibilities of the Utah State Bar as:

- Advancing the administration of justice according to law;
- Aiding the courts in carrying on the administration of justice;
- Regulating the admission of persons seeking to practice law;
- Regulating and disciplining persons practicing law;
- Fostering and maintaining integrity, competence and public service among those practicing law;
- Representing the Bar before legislative, administrative and judicial bodies;
- Preventing the unauthorized practice of law;
- Promoting professionalism, competence and excellence in those practicing law through continuing legal education and by other means;
- Providing service to the public, to the judicial system and to members of the Bar;
- Educating the public about the rule of law and their responsibilities under the law; and
- Assisting members of the Bar in improving the quality and efficiency of their practice.

The Board of Bar Commissioners has been granted all powers necessary and proper to carry out the duties and responsibilities of the Bar and the purposes of the Rules and has all authority not specifically reserved to the Court.

The Bar's internal operations are governed by By-laws and a variety of administrative policies and procedures. Other rules necessary to regulate and manage the practice of law have been promulgated by the Bar and approved by the Court. These other rules include the Rules Governing Admission, Rules of Lawyer Discipline, Disability and Sanctions, Rules of Professional Conduct, Special Practice Rules, Resolution of Fee Disputes and the The Fund for Client Protection. The Court has also established rules governing mandatory continuing legal education and IOLTA. These rules may be found at www.utcourts.gov.

Bar Leadership

The Bar is a 501(c)(6) non-profit Utah corporation governed by a fifteen-member Board of Bar Commissioners, which includes two court-appointed public members, twelve elected lawyers representing the judicial districts, and two elected officers. (Note: The President-elect may also serve as a Commissioner during his/her President-elect year.) The Commission also includes twelve non-voting ex officio members. The Commission hires an Executive Director to carry out the operations of the Bar and the policies of the Commission. The Executive Director employs and supervises the activities of operations staff, which numbers twenty-four full-time and one part-time employee.

During the 2021–2022 year, the Bar Commission included the following:

ELECTED OFFICERS:



Heather L. Thuet
President

Key Legal Group, LLC – Salt Lake City



Kristin "Katie" Woods
President-elect

5th Division Representative (Beaver, Iron, and Washington Counties)
Attorney at Law – St. George

ELECTED LAWYERS AND GEOGRAPHIC AREA:



Marty Moore
1st Division

Box Elder, Cache, and Rich Counties
Peck Baxter Watkins & Bailey – Logan



Mark O. Morris
3rd Division

Tooele, Salt Lake, and Summit Counties
Snell & Wilmer – Salt Lake City



John W. Bradley
2nd Division

Weber, Morgan, and Davis Counties
Attorney General's Office – Ogden



Andrew Morse
3rd Division

Tooele, Salt Lake, and Summit Counties
Snow Christensen & Martineau – Salt Lake City



Traci Gundersen
3rd Division

Tooele, Salt Lake, and Summit Counties
Attorney at Law – Salt Lake City



Michelle Quist
3rd Division

Tooele, Salt Lake, and Summit Counties
Holland & Hart – Salt Lake City



Gregory N. Hoole
3rd Division

Tooele, Salt Lake, and Summit Counties
Hoole & King – Salt Lake City



Tyler S. Young
4th Division

Millard, Juab, Utah, and Wasatch Counties
Young Kester Black & Jube – Provo



Chrystal Mancuso-Smith
3rd Division

Tooele, Salt Lake, and Summit Counties
Kimball Anderson – Salt Lake City

PUBLIC MEMBERS APPOINTED BY THE SUPREME COURT:



Shawn Newell
Public Member
Utah Multicultural Civic Council –
Salt Lake City



Rick Hoffman, CPA
Public Member
Lone Peak Valuation Group –
Salt Lake City

EX OFFICIO MEMBERS:



Heather M. Farnsworth
Immediate Past President
Utah Labor Commission,
Adjudication Division – Logan



Erik A. Christiansen
Utah State Bar Delegate to the ABA
Parsons Behle & Latimer – Salt Lake City



Elizabeth Kronk Warner
Dean
S. J. Quinney College of Law –
Salt Lake City



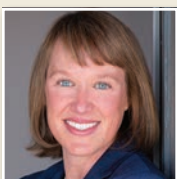
Camila V. Moreno
Young Lawyers Delegate to the ABA
United States District Court –
Salt Lake City



D. Gordon Smith
Dean
J. Reuben Clark School of Law – Provo



Beth Kennedy
Women Lawyers of Utah Representative
Zimmerman Booher – Salt Lake City



Margaret Plane
Judicial Council Representative
Park City Corporation – Park City



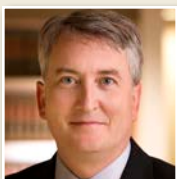
J. Ramzi Hamady
Minority Bar Association Representative
Ray Quinney & Nebeker – Salt Lake City



Nick Stiles
Utah Supreme Court Representative
Administrative Office of the Courts –
Salt Lake City



Brandon Mark
LGBT & Allied Lawyers of Utah
Representative
Parsons Behle & Latimer – Salt Lake City



Nathan D. Alder
Utah ABA Members' Delegate
Christensen & Jensen



Grant A. Miller
Young Lawyers Division Representative
Salt Lake Legal Defender Association –
Salt Lake City



Kim Cordova
Utah State Bar Delegate to the ABA
Ed Brass Law – Salt Lake City



Tonya Wright
Paralegal Division Representative
Peck Baxter Watkins & Bailey – Logan

2021–2022 Commission Priorities

● Lawyer Well-being;

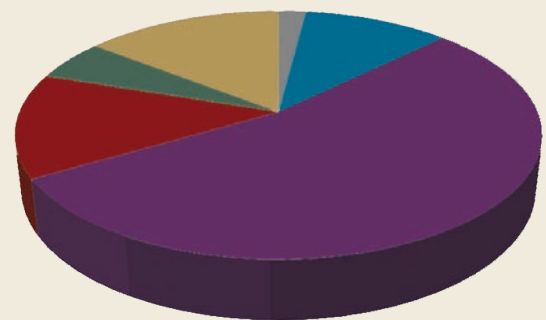
● Access to Justice

Licensing Statistics

Status	2020–2021	2021–2022	Change
Active	8,866	8,998	132
Active under 3 years	906	863	(43)
Active Emeritus	267	270	3
In House Counsel	112	116	4
Foreign Legal Counsel	4	4	–
Licensed Paralegal Practitioner	13	23	10
Military Spouse	–	–	–
Subtotal – Active	10,168	10,274	106
Inactive – Full Service	803	827	24
Inactive – No Service	2,029	2,055	26
Inactive Emeritus	363	414	51
Inactive House Counsel	9	10	1
Subtotal – Inactive	3,204	3,306	102
Total Active & Inactive	13,372	13,580	208

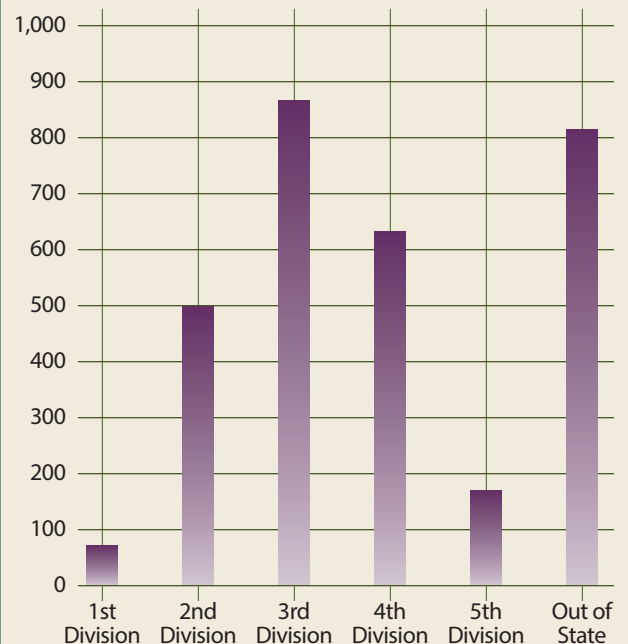
Active Attorneys by Region	2020–2021	2021–2022	Change
1st Division (Logan–Brigham)	199	208	9
2nd Division (Davis–Weber)	972	1,107	35
3rd Division (Salt Lake)	5,624	5,586	(38)
4th Division (Utah)	1,361	1,411	50
5th Division (So. Utah)	548	562	14
Out of State	1,464	1,500	36
Total Active	10,168	10,274	106
Paralegal Members	160	156	(4)

ACTIVE ATTORNEYS BY DIVISION



● 1st Division ● 4th Division
● 2nd Division ● 5th Division
● 3rd Division ● Out of State

GROWTH BY DIVISION FROM 2012–2022*



*During the 2011–12 fiscal year, 1,161 attorneys did not designate a division.

Bar Programs & Services

REGULATORY SERVICES

Non-exam Attorney Applications for Admission

Special admissions include reviewing and processing Military Lawyers, House Counsel, Admission on Motion and Pro Hac Vice applications. During the Fiscal 2021–22 year, we received the following special admissions applications:

	Applications	Admitted	Pending	Denied	Withdrawn
Military	0				
House Counsel	21	8	1	0	0
Motion	113	59	12	3	1
UBE Transfers	76	38	12	0	1
Pro Hac Vice	312				

Applications for Admission by Bar Examination

Admissions includes the application process, character and fitness file reviews and hearings, preparation for and administration of the exam, grading essay exams, and all reciprocal admissions. Committees include the **Admissions Committee** (Hon. Daphne Oberg and Evan Strassberg, Co-chairs), **Character and Fitness Committee** (Evan Strassberg and Melinda Bowen, Co-chairs), **Bar Examiner Committee** (Tanya N. Lewis and Mark Astling, Co-chairs), and the **Test Accommodation Committee** (Joan M. Andrews, Chair).

July 2021 Bar Examination Statistics

226 July Bar Examinees | 195 Successful July Bar Examinees | Pass Rate for the July 2021 Bar Exam: 86%

Essay Scores
50 Points Possible
Average Score: 30.33

Multistate Scores
200 Points Possible
Utah Average: 146.3
National Average: 140.4
(64,833 tested)

Combined Scores
400 Points Possible
Utah Mean Score: 292.5
Passing Score 270

February 2022 Bar Examination Statistics

72 February Bar Examinees | 52 Successful February Bar Examinees | Pass Rate for the February 2022 Bar Exam: 72.2%

Essay Scores
50 Points Possible
Average Score: 31.54

Multistate Scores
200 Points Possible
Utah Average: 143.59
National Average: 132.6
(16,504 tested)

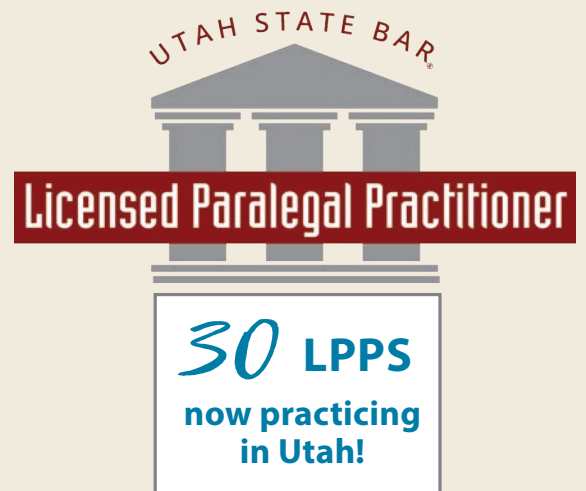
Combined Scores
400 Points Possible
Utah Mean Score: 280.8
Passing Score: 270

Licensed Paralegal Practitioner Program

In March 2022, the Bar hired AJ Torres to oversee the administration of the New Lawyer Training Program (NLTP) and the LPP program. This NLTP/LPP administrator position is now under the purview of the Bar's admissions department. This merging enables LPP to benefit from the extensive resources within admissions and to more closely align the image of LPPs as licensees of the Bar alongside lawyers.

Over the 2021–2022 fiscal year, the LPP administrator worked to implement an online application system. This system will be instituted for the August 2023 examination cycle.

By the end of 2022, the Utah State Bar anticipates granting 7 additional licenses to qualified applicants, which would bring the overall total to 30. These LPPs practice across the state – including Salt Lake City, St. George, Delta, and Logan. The public can find LPPs by clicking on the “Licensed Paralegal Practitioner” icon on the homepage of the Bar’s referral service: licensedlawyer.org.



The **LPP Steering Committee**, chaired by **Judge Amber Mettler**, has maintained an active agenda. The committee amended Rule 14-802 to clarify that LPPs can assist clients with name and gender change (consistent with Utah Supreme Court precedent) as well as common law marriage. The full list of permitted activities for LPPs within their limited legal license is enumerated in Rule 14-802(c)(1)(A)-(L). The committee has also been working on amendments to the rules which will allow LPPs to more easily and efficiently provide legal services to their clients.

New Lawyer Training

Utah's New Lawyer Training Program (NLTP) is the Bar's award-winning mentoring program, which is required for all newly admitted attorneys who have less than two years of practice experience. In 2021–2022, the Bar's **Committee on New Lawyer Training** (NLTP Committee) was co-chaired by **Rebecca Long Okura** and **Laura Rasmussen**, who have both been dedicated members of the committee since its inception in 2009.

Close to 3,000 new attorneys have completed the NLTP throughout the past 11 years. During their 12-month mentoring term, new lawyers meet with their mentors 10 times, for at least two hours each time, to discuss the new lawyer's legal work, professional development, and adjustment to the practice of law. The mentoring plan also requires that mentors and new lawyers examine the Rules of Professional Conduct as a means of more effectively teaching and fostering professionalism, ethics, and civility.

In 2021, the NLTP continued in its mission to help new lawyers take the first steps to success in their legal career through mentorship. The NLTP Committee recognizes that the program's success is due, in no small part, to the caliber of our mentors and extends its sincere thanks to all of Utah's NLTP mentors for helping us to maintain the NLTP's position as one of the top legal mentoring programs in the country.

By volunteering to help new lawyers start their practice with all the tools they will need to succeed, mentors are making a much-needed investment in the future of the legal profession. The Bar and the NLTP Committee are dedicated to making sure their investments pay off.



Professional Conduct Enforcement

The Office of Professional Conduct investigates complaints of unethical conduct; provides ethics education seminars; and either resolves or prosecutes cases before hearing panels, the district courts and the Utah Supreme Court. The administrative oversight of the Office of Professional Conduct is no longer under the Utah State Bar. That administrative oversight is now with an **Oversight Committee** (**Judge Diana Hagen**, Chair) that reports directly to the Utah Supreme Court. Committees that the Office of Professional Conduct interacts with include the **Ethics and Discipline Committee of the Utah Supreme Court** (**Christine Greenwood**, Chair); the **Utah Bar's Ethics Advisory Opinion Committee** (**John A. Snow**, Chair); the **Supreme Court Rules of Professional Conduct Committee** (**Simón Cantarero**, Chair) that reports directly to the Utah Supreme Court. The OPC prepares a separate report on its operations which is available at www.opcutah.org.

The **Ethics and Discipline Committee of the Utah Supreme Court** (**Christine Greenwood**, Chair) hears cases against lawyers and licensed paralegal practitioners accused of violations of the Rules of Professional Conduct. Following a hearing before a screening panel, the panel may dismiss, recommend the imposition of a private admonition or public reprimand, or instruct OPC to file an action against the respondent in district court.

The **Utah State Bar Ethics Advisory Committee** (**John Snow**, Chair) issues written opinions and letter responses to requests for advisory opinions regarding the ethical propriety of professional conduct of lawyers and LPPs. Bar staff supports the **Supreme Court Rules of Professional Conduct Committee** (**Simón Cantarero**, Chair) which makes recommendations to the Court regarding the ethical rules governing the practice of law.

Continuing Legal Education

Over the past year, the CLE Department created, administered, and hosted 194 events, which included the attendance of 26,588 attorneys across Utah and the U.S., noting additionally that more than 48 different subject matter areas of practice have been represented in this annual catalog of CLE events. Since April 2020, the Bar has conducted many CLE events virtually, with attendance ranging from 50 people up to 1,500 members at one event. As well, for the first time since the pandemic, many of our events throughout the year were hybrid, being hosted both in person and online for a broader audience to access. In addition to traditional CLE events, a total of 5,664 hours of video replays, of Utah State Bar CLE Department content, were completed independently by licensees online. All sections of the Bar, as well as our community partnerships with the S.J. Quinney College of Law, the J. Reuben Clark Law School, the Utah Center for Legal Inclusion, and the Administrative Office of the Utah State Courts, have had opportunities to host events with us and contribute to the faculty of our professional development training. Importantly, the CLE Department collaborates regularly with the **CLE Advisory Board** (**Jonathan O. Hafen**, Chair) for topics and themes to enhance the content and inclusion represented in our training events for the Bar.



General Bar Management and Operations

General Bar management includes annual licensing, maintenance of databases, personnel, financial controls, inventory, equipment, governance organization and support, and long-range planning. Bar staff manages policy implementation and operations through various voluntary leadership committees, including: **Bar Commission**, **Bar Commission Executive Committee**, and the **Bar Commission Budget & Finance Committee**. A copy of the 2021–2022 audit by Tanner, LLC is available at www.utahbar.org/bar-operations/.

"GROUP" SERVICES

Fall Forum, Summer & Spring Conventions

Relationships and learning are enhanced when a premium is placed on respect for multiple points of view and on innovative methods of gathering to discuss issues facing the Bar, the legal profession and the judiciary. In the face of a pandemic, most of our daily/weekly CLE events were held virtually.

During this fiscal year, the **2021 Summer Convention** was held in Sun Valley, Idaho where we hosted 395 of our colleagues for the CLE sessions and annual traditions of the Summer Convention.



3,340 online attendees over 3 months

In November 2021, the **Fall Forum** tradition was undertaken and converted to an online series of eight CLE sessions from November through January. The eight sessions discussed social media use for legal practitioners, legal writing from a judge's perspective, the upcoming Utah legislative session, cybersecurity, the future of the IMF, well-being in legal organizations, the Utah oral history project and an interview celebrating the life of Loren Weiss, and judicial safety and courthouse security. For the eight sessions of the Fall Forum, 3,340 Utah practitioners joined online over the three month series.

The CLE Department teamed with the Litigation Section to host their annual **Trial Skills Academy** online – featuring 4 sessions on expert witnesses, mediation, and deceptive testimony. We were pleased to see 963 attorneys joining the Litigation Trial Academy in 2021.

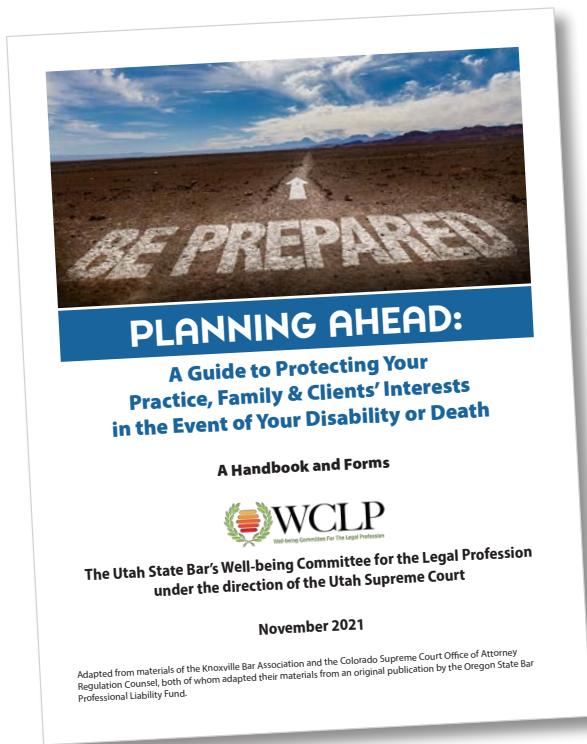
With a continuing abundance of caution, the **Spring 2022 Convention** was held as an online CLE series, with ten sessions from March until May 2022, including the attendance of 4,683 attorneys, judges, faculty, and guests. The Spring Convention featured CLE dialogue and panel presentations about civility and LPP practice, the rule of law, privacy law updates, employment law, the economic effects of Covid and bankruptcy, asset protection, family law and Rule 26, developments in First Amendment and media law, diversity and criminal justice, and the Utah appellate bench discussing the Utah Constitution.



Utah Lawyer Well-being

The **Well-being Committee for the Legal Profession** (WCLP) was established in 2019 with the charge of creating a well-being movement in the Utah legal community. The WCLP provides our legal community with strategies and resources to help them not only to overcome mental health issues but also to thrive in the profession. The WCLP is chaired by **Justice Paige Petersen** and **Cara Tangaro**. The Committee Executive Director is **Martha Knudson** who is a lawyer with a masters degree in applied positive psychology. The WCLP works with all legal community stakeholders to develop programs and strategies that foster wellbeing. The WCLP reaches the legal community via podcasts, CLEs, and well-being programming that is integrated into existing Bar programs such as the NLTP and lawyer Admissions. WCLP also partners with both of Utah's law schools to foster wellbeing during law school.





In the past year, WCLP sponsored or co-sponsored 12 highly attended well-being CLEs, including “Life-Altering Events: Prepare Now to Protect Your Practice, Clients, and Family.” The life-altering events initiative includes a web page with free resources, guidance, and succession planning information. WCLP also worked with the Salt Lake Chamber of Commerce’s foundation to create the “Living Well in Law Guide: A Guide to Building Engagement, Resilience, and Well-Being for the Legal Profession.”

Utah Lawyers Helping Lawyers (LHL) assists any Bar licensee whose professional performance may be impaired because of mental illness, emotional distress, substance abuse or any other disabling condition or circumstance by connecting them with a confidential mentor who has overcome similar difficulties. LHL also provides CLE programming designed to help lawyers acknowledge and overcome mental health and substance abuse issues.

The Utah State Bar contracts with Blomquist Hale to provide free in-person and remote counseling to all Bar licensees and their dependents. Licensees can receive help with family problems, stress, depression, anxiety, personal cash management difficulties, elder care challenges, assessment of drug or alcohol dependence, and any other issues impairing work or personal lives.

Committee Support – Unrelated to Other Programs

Stand-alone committees have been charged to provide professional leadership and study of designated issues. A current listing of all Bar committees can be found at www.utahbar.org/bar-operations/.

Section & Division Support

Our staff provides support services to 39 Sections and 2 Divisions which are independent and financially self-sustaining. Activities include section meetings and elections, CLE luncheons and annual seminars, social events and charitable endeavors, dues collection, general administrative and financial services, email and newsletter communications, and the maintenance of websites and blogs. A listing of all Bar sections and divisions can be found at <http://www.utahbar.org/about/meet-section-division-chairs/>.



The Utah Bar Journal

The *Utah Bar Journal* publishes articles of practical interest to Utah attorneys. The *Utah Bar Journal* was published six times this past year by the **Bar Journal Committee** (**Alisha Giles**, Chair) and provided to Bar licensees and subscribers. The Bar Journal Committee has 20 members and a bar staff-liaison. Access to issues of the *Utah Bar Journal* can be found at barjournal.utahbar.org.

Public Outreach

The highlight of the year, from a public outreach standpoint, was the return to in-person events. For the first time in nearly three years, the Bar was able to participate in live events including Law Day, Mock Trials, Constitution Day, live CLEs and many others.

The Bar's outreach to attorneys included a focus on attorney well-being, with participation in the ABA's Well-Being Week. During the week daily social media posts, podcasts and other materials provided



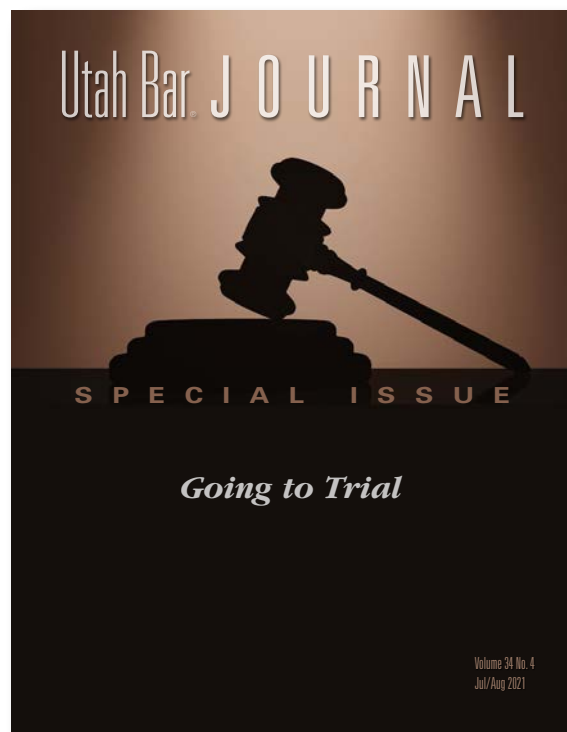
attorneys with tips to improve well-being. A highlight was a CLE

event featuring Craig and Nancy Johnson, who advised attorneys on transitioning a practice during life-altering events. Craig felt strongly about sharing what he learned as he battled a rare form of brain cancer. Craig completed the CLE just a few months before his passing in July. You can watch the video here: https://youtu.be/Ochk_fUKD0I.

The easing of the pandemic reduced traffic to the Bar's Licensed Lawyer attorney referral site, which conducted 1,435,550 searches for potential clients. That's down approximately seven percent from the previous year. However, those searches generated 11,595 referrals to Utah attorneys, and increase of 11 percent. This increase reflects and improvement in the manner in which attorneys prepare their Licensed Lawyer profiles and respond to inquiries.

Utah's Licensed Paralegal Practitioner Program continued to expand, with 23 LPPs currently licensed in the state. The Bar continues to promote this program to the public and to potential LPPs in an effort to increase the number of practicing LPPs and close the Access to Justice Gap.

Over the course of the year the Bar received 113 requests for media interviews on a variety of topics. Additionally, the Bar's public outreach programs also supported many other Bar projects, including conventions, pro bono efforts, access to justice events, court news, and many others.



Diversity, Equity & Inclusion Office

The Diversity, Equity & Inclusion Officer for the Bar continues to plan and implement diversity initiatives and activities that engage our licensees, students, community groups, and underrepresented populations.

The Bar works with the Office of Fairness and Accountability of the Utah State Court, the S.J. Quinney College of Law, the J. Reuben Clark Law School at BYU, and Utah Bar licensees to reach law students, encourage them to have longevity in their legal careers in Utah, and to continue to diversify the Utah Bench and Bar.

Certificates of Good Standing

Certificates of good standing offer proof of licensure and MCLE compliance. This year, the Utah State Bar moved all certificates of good standing to a fully automated online process. This has allowed attorneys to request and receive their certificates within 24 hours. The Utah State Bar continues to work toward procedural efficiencies throughout the organization in order to better serve the public and the profession. The General Counsel's office provided 1,005 certificates during fiscal 2021–22.

Ethics Hotline and Professional Development Office

Since September 2020, the Ethics Hotline has answered hundreds of ethics inquiries from Utah lawyers.

Utah lawyers and LPPs with questions regarding their professional responsibilities can contact the Utah State Bar's General Counsel office for informal guidance during any business day by sending inquiries to ethicshotline@utahbar.org.

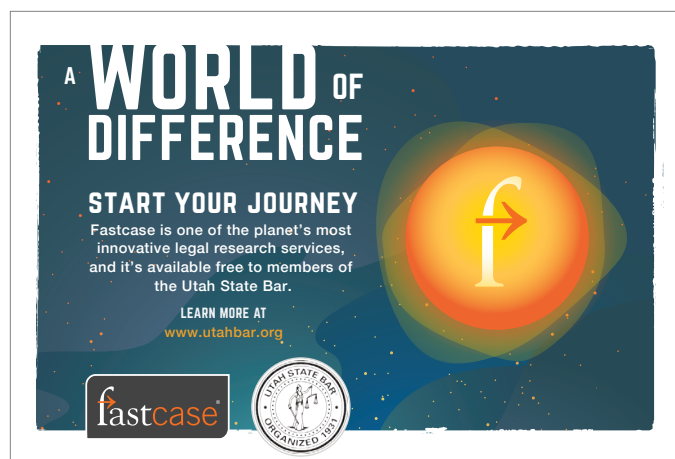


Member Benefits

The Utah State Bar has contracted with benefits administrator Beneplace to expand offerings and services to Bar members at no cost to Bar members. Beneplace, in partnership with the Bar, researches and recruits benefits providers and places them in the Utah State Bar benefits catalog <http://www.beneplace.com/utahbar>. Programs range from office supplies, to discounted membership programs, to vacation planning, to legal specific vendors, to ticket offers for sports and recreational opportunities. New vendors and discounts arrive each month with a summary of recent additions being provided online at <http://www.utahbar.org/member-services/>.

BENEPLACE

The Bar also provides licensees with access to Fastcase; winner of the prestigious American Association of Law Libraries (New Product) Award. Fastcase is available for iOS, Android, and Windows Phone and is used by more attorneys than any other legal app, according to the ABA. Bar licensees may use the app for free to access Fastcase's comprehensive legal research database on the go.



PUBLIC SERVICES

Access to Justice Programs

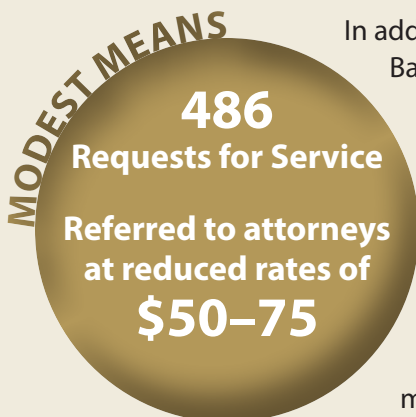
During Fiscal Year 2021–22, the Bar provided – and continued to expand – its initiatives to advance equity in Utah’s legal system by increasing access to justice for people with lower incomes and those who are disadvantaged Utahns. This work is done through the Access to Justice Office, the Modest Means Lawyer Referral Program, and by the Pro Bono and Access to Justice Commissions. In addition, the Access to Justice Office made permanent the staff attorney, office coordinator, and law student extern positions.

The Access to Justice Office provides direct legal aid through the Virtual Legal Clinic, the Utah Free Legal Answers website, and the Pro Se Calendar Volunteer Program. The Virtual Legal Clinic, which replaced Tuesday Night Bar, is growing each year. We have added additional volunteer lawyers so that more program participants may receive direct, relevant help. The clinic allows clients to meet with lawyers via phone or email to receive brief legal advice. VLC lawyers continue to sign up and we now have 73 lawyers providing legal advice in 19 different practice areas. In 2021–2022, the Clinic assisted 1,266 program participants.



Utah Free Legal Answers is a virtual legal advice service in which pro bono lawyers respond to civil legal questions submitted by eligible participants. This program is administered by the Access to Justice Office in partnership with ABA Free Legal Answers. There are 52 lawyers providing legal advice to 384 program participants. Most cases involved family law matters, with housing and debt being the next most requested topics.

The Pro Se Calendar Volunteer Program is managed by the Access to Justice Office. The 71 pro bono lawyers who donated their time on the weekly Debt Collection and Immediate Occupancy (IMO) Pro Se Calendars in Third Judicial District provided this support. Through this program, 600 participants with debt collection matters and 393 with housing matters received free limited-scope representation. In spring 2022, the ATJ Office took over full control and management of the IMO calendar, so these numbers only represent cases from the end of March 2022. Given its success, the Pro Bono Commission also expanded this calendar to include housing eviction matters from the West Jordan Court.



In addition to pro bono services, the Bar provides reduced rate lawyer referrals through the Bar’s Modest Means Lawyer Referral Program. It allows eligible participants to receive referrals for reduced rate legal services. The Program received 486 requests, and the ATJ office gave referrals to requestors for lawyers who agreed to hourly rates of \$50–\$75. This work was supported and guided by the **Modest Means Committee**, co-chaired by **Judge Patrick Corum** and **Judge Ann Marie McIlff Allen**, and staffed by the Access to Justice Office.

The Pro Bono Commission (PBC), co-chaired by **Judge Michelle Christiansen Forster** and **Judge Angela Fannesbeck** and staffed by the Access to Justice Office, met regularly to ensure statewide support for pro bono service efforts from licensed lawyers and licensed paralegal practitioners. The PBC continues to support the expansion of Bar Signature Programs and Pro Bono Case Circulation.

The Pro Bono Case Circulation program provided pro bono representation to 274 people while numerous people were helped through specialized Bar Signature Programs. Signature programs are administered in partnership with other entities. The PBC currently supports Wills for Heroes, Senior Solutions, Guardianship, the Bankruptcy Pro Bono Program, and the Veterans Legal Clinic.

Additionally, the Pro Bono Commission is now championing the implementation of the Utah Pro Bono Opportunities Portal by Paladin (Portal). The Portal will more efficiently facilitate the posting, tracking, and advertising of Utah's pro bono legal service opportunities. Once fully implemented, legal professionals, including law students, law graduates, licensed paralegal practitioners, and inactive and retired lawyers, will be able to search for any opportunities that interest them and quickly connect with legal service providers all in one centralized database. The Portal will publicly launch in October 2022.

The **Access to Justice Commission**, co-chaired by **Justice Christine M. Durham** (Ret.) and **Amy F. Sorenson** and staffed by the Access to Justice Office, studies systemic access to justice issues.

During the past year, the Commission focused on studying the effects of virtual state court hearings. Using data collected from a 10-month survey of lawyers, litigants, and other court users, the Commission presented in June 2022 its Utah Survey of Court Users: The Impact of Remote Hearings on Access To Justice to the Utah State Courts' Green Phase Workgroup and the Judicial Council. The courts are now using these findings and recommendations to develop a statewide policy on the use of virtual hearings.

Through all these events and programs, the Utah State Bar's Access to Justice Office remains committed to studying systemic issues, addressing barriers to justice, and helping those who need legal services.

This year the Bar was proud to support access to justice with a donation to And Justice for All's new James B. Lee Justice Center building. The state-of-the-art building will house the operations of the Disability Law Center, Legal Aid Society of Salt Lake, and Utah Legal Services. Last year, And Justice for All provided legal services to 28,255 low-income Utahans.

Fund for Client Protection

The **Fund for Client Protection Committee** (Stephen W. Farr, Chair) has 11 attorney members, and 1 bar-staff liaison. There were 16 claims made to the Utah State Bar Fund for Client Protection against 8 attorneys during the 2021–22 fiscal year totaling \$135,300. Of these claims, 13 were approved for awards totaling \$85,600. The rules to the Fund for Client Protection are housed on the court website at https://www.utcourts.gov/resources/rules/ucja/index.htm#Chapter_14



Unauthorized Practice of Law Committee

Only persons who are active, licensed members of the Bar in good standing may engage in the practice of law in Utah. **The Unauthorized Practice of Law (UPL) Committee** investigates UPL complaints against individuals and organizations under Supreme Court Rules of Practice Rule 14-802. During FY2020-2021, the committee (**Maribeth LeHoux** and **Michael Menssen** Co-Chairs) received twenty-two (22) new complaints. Six (6) complaints were against attorneys licensed in Utah or other jurisdictions and the committee referred those matters to the Utah Office of Professional Conduct. The other sixteen (16) complaints were against non-lawyer individuals or organizations, six (6) of which were closed following admonition or for lack of witness cooperation or evidence. One (1) complaint was assigned to outside counsel for formal legal action in the District Court. The Committee continues to investigate the other twelve (12) complaints.

Young Lawyers Division

The Utah Young Lawyers Division is the Utah State Bar's program for new attorneys. The Young Lawyers Division provides its members with service opportunities, tools to navigate the early years of their careers, opportunities for community involvement and networking, and resources to grow their lawyering skills. Their website is <http://younglawyers.utahbar.org/>.



JOINT “GROUP” & PUBLIC SERVICES

Consumer Assistance Program

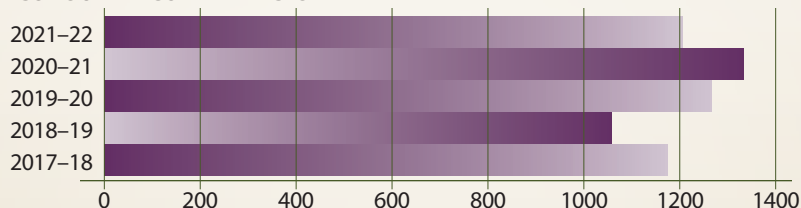
The Consumer Assistance Program (CAP) offers support to both consumers and attorneys who request assistance in their communication with each other. CAP focuses on minor complaints submitted by consumers whose concerns usually include wanting timely return calls from their attorneys, routine updates about their cases, regular billing statements, and copies of their client files. The CAP attorney strives to facilitate communication between consumers and their lawyers so that minor issues can be resolved before they escalate into disciplinary matters.

Most often the CAP attorney offers guidance to consumers to help them understand what they may and may not reasonably expect from their counsel and the legal process. Additionally, many consumers need information about other Utah State Bar services such as Access to Justice, Fee Dispute Resolution, Fund for Client Protection, Licensed Lawyers, Modest Means, Tuesday Night Bar, Virtual Legal Clinic or Unauthorized Practice of Law. The CAP attorney also provides consumers with information about outside sources of help, including Legal Aid Society, Utah Legal Services, self-help information on the Utah Courts' website, Office of Professional Conduct, and Judicial Conduct Commission.

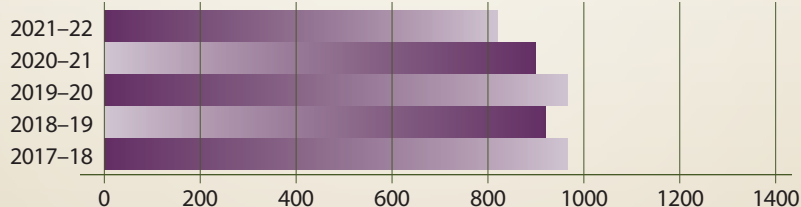
During the 2021–22 fiscal year, the CAP attorney opened 831 files (81% civil matters, 19% criminal matters), attorneys were contacted in 163 matters (20%). The CAP attorney handled 1,202 phone conferences and in-person meetings. In 289 matters (35%) the CAP attorney discussed with the consumers all of their concerns but was not able to provide assistance to them. Explaining the reasons for this was extremely helpful to the consumers.

CONSUMER ASSISTANCE PROGRAM ACTIONS

CONSUMER CONFERENCES



FILES OPENED



Disciplinary Process Information Office

The Disciplinary Process Information Office (DPIO) is designed to assist attorneys who find themselves the subject of Bar complaints. The DPIO attorney explains and answers questions about the complaint process and refers attorneys to the appropriate procedural rules at various stages of the process, and provides additional information that pertains to individual matters.

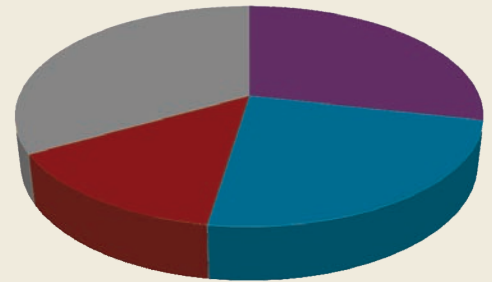
During the 2021–22 fiscal year, the DPIO attorney opened 22 files, handled 40 phone conferences, and responded to 14 emails. The DPIO attorney provided information to 3 individuals who were seeking relicensure with the Utah State Bar, and 2 individuals who sought reinstatement.

Fee Dispute Resolution Program

In the last fiscal year, the **Fee Dispute Resolution Committee** (**Sheleigh Harding**, Chair) prepared and conducted hearings with a volunteer lawyer or panels of volunteer lawyers, judges and lay people to resolve disputes about legal fees in a process through which parties voluntarily agree to be bound. The committee presently has 15 lawyers, 8 lay-people and 1 bar-staff liaison. Last year, the committee opened 21 cases, settled 6, arbitrated 5, and 3 cases were mediated. A link to more information may be found at <http://www.utahbar.org/public-services/fee-dispute-resolution-program>.

FEE DISPUTE RESOLUTION CASES

- Settled
- Arbitrated
- Mediated
- Pending



Law & Justice Center Operations

The Utah State Bar owns and operates the 33,000 square foot building known as the Utah Law & Justice Center. The Center provides low cost meeting room space and, in pro bono cases, no cost meeting room space. Services by the Center staff include organization of events, audio-visual rental, catering, low cost leases, tenant support, interior and exterior grounds maintenance and security. Groups using the meeting space included the Bar Commission, Bar Committees, Bar Section Continuing Legal Education luncheons and seminars, mediations, arbitrations, charitable and non-profit entities, educational organizations, public interest groups, and association trainings.



In-Person Meetings are Back!

The **UTAH LAW & JUSTICE CENTER** offers meeting space for professional, civic, and community organizations

Customized seating arrangements are available, as well as:

- reasonable rates
- central downtown location
- audio-visual equipment and support
- complete catering
- personal attention
- free, adjacent parking
- registration area

For information and reservations, contact:

Travis Nicholson, Building Facilities & Events Manager
tnicholson@utahbar.org | (801) 297-7029

Public Education, Services and Special Projects

The Bar Commission regularly provides public education projects including participation with the American Bar Association, makes appointments to Utah State Boards and Committees, helps to fund the Law Related Education Project, and sponsors the Law Day Celebration with the **Law Day Committee (Young Lawyers Division)**, among other projects.



Governmental Relations

The Utah State Bar engages in legislative activities and public policy actions related to the practice of law and the administration of justice as authorized by *Keller v. State Bar of California*, 496 U.S. 1 (1990) and as authorized by the Utah Supreme Court. The Bar hires a legislative representative and has a **Governmental Relations Committee (Jaqualin Friend Peterson and Sarah E. Bouley, co-chairs)**. The Governmental Relations Committee is made up of representatives of each Bar section who meet weekly during the annual Utah Legislative session to discuss legislation that affects each practice area.

2021–2022 Section Leadership

Lara Swenson, Chair
Antitrust Section

Christian Clinger, Chair
Dispute Resolution Section

Cherise Bacalski, Chair
Appellate Practice Section

Daniel Harper, Chair
Education Law Section

Jennifer Orson, Chair
Juvenile Law Section

Nicholas Frandsen, Chair
Banking & Finance Section

Greg Lyle, Chair
Elder Law Section

Erik Strindberg, Chair
Labor & Employment Section

Katherine Kang, Chair
Bankruptcy Section

Derek Julio, Chair
Entertainment, Communications
& Media Law

Ben Lear, Chair
Legal Entrepreneur Law Section

Klea Harris, Chair
Business Law Section

Blaine Rawson, Chair
Environmental Law Section

Matthew Bell, Chair
Limited Scope Section

**Hannah Follender &
J.D. Lauritzen, Chairs**
Cannabis Law Section

Jonathan Hoagland, Chair
Estate Planning Law Section

Melanie Vartabedian, Chair
Litigation Section

Jonathan Hanks, Chair
Collection Law Section

Danielle Hawkes, Chair
Family Law Section

J. Ed Christiansen, Chair
Military Law Section

Quinn Sperry, Chair
Community Association Law Section

Christian Thompson, Chair
Franchise Law Section

Blake Voorhees, Chair
Non-Profit Law Section

Jason Groth, Chair
Constitutional Law Section

LaShel Shaw, Chair
Government & Administrative Section

Judson Pitts, Chair
Real Property Law Section

Erik Hamblin, Chair
Construction Law Section

Allison Griffiths, Chair
Health Law Section

Thomas Brady, Chair
Securities Law Section

T. Richard Davis, Chair
Senior Attorneys Section

Richard Mortensen, Chair
Corporate Counsel Section

Angilee Dakic, Chair
Indian Law Section

Clayton Simms, Chair
Small Firm Section

Nic Mills, Chair
Criminal Law Section

Adam Smoot, Chair
Intellectual Property Section

Samuel A. Lambert, Chair
Tax Law Section

Deanna Sabey, Chair
Cyberlaw Section

Joseph Brubaker, Chair
International Law Section

2021–2022 Division Leadership

Grant Miller, President
Young Lawyer Division

Shalise McKinley, President
Paralegal Division

2021–2022 Awards



Judge of the Year
Hon. Brendan P. McCullagh



**Dorathy Merrill Brothers Award
for the Advancement of Women
in the Legal Profession**
Jessica Andrew



Lawyer of the Year
Joni J. Jones



**Raymond S. Uno Award
for the Advancement of Minorities
in the Legal Profession**
Ross I. Romero



Committee of the Year
**Governmental Relations
Committee**



**Charlotte L. Miller
Mentoring Award**
Ann Marie Taliaferro



Section of the Year
Intellectual Property Section



James B. Lee Mentoring Award
Edwin S. Wall



Community Member
Bertie Kee Lopez



Paul T. Moxley Mentoring Award
Kent B. Scott



Professionalism Award
Juliette P. White

