Year In Review

2023-24



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MESSAGE **FROM PRESIDENT**

CRAFTING SOLUTIONS, DELIVERING SUCCESS

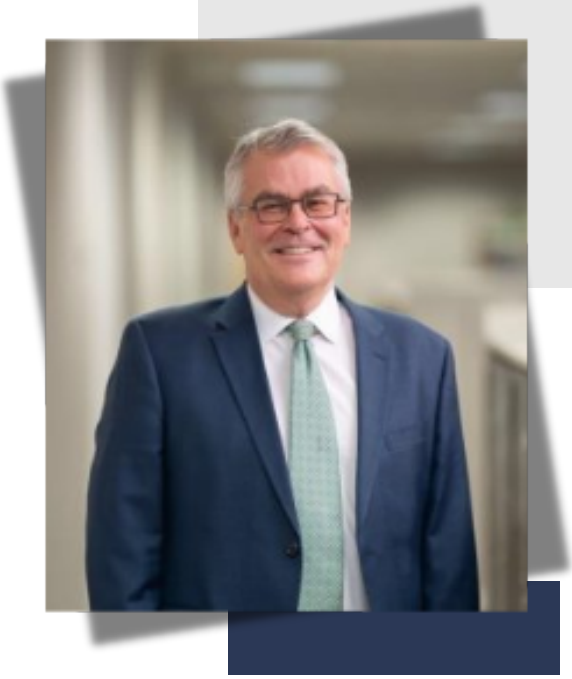
During the 2023-2024 Bar year, I served as President of the Utah State Bar. It was an incredible year. Working with the Utah Supreme Court, the Office of Legal Services Innovation, known more commonly as the Regulatory Sandbox, was transitioned to the Utah State Bar, including its staff, budget, infrastructure, and offices.

In the process, the Sandbox's budget was reconfigured and the purpose and goals of the Sandbox refined. The Sandbox is now more focused on assisting low-income individuals with access to justice issues and is more focused on developing programs to assist the underserved members of the Utah community.

The Utah State Bar also recruited and hired some incredible new staff this bar year to better serve the citizens of Utah. I am incredibly proud of our staff, especially Elizabeth Wright and Nathan Severin, who had to deal with a jointly conducted audit by the Legislature and the Utah Supreme Court and who had to adapt to a new budget approval schedule at the request of the Utah Supreme Court.

I also am proud of our Utah State Bar staff who continued to present high quality continuing legal education programs, including at the Spring Convention in St. George, the Fall Forum, and at the virtual Summer Convention, which attracted more than 4,000 of Utah's lawyers. A special kudos and thank you to Michelle Oldroyd and Lydia Kane for putting on an incredible offering of CLE on nearly every day of the Bar year. The Utah State Bar also continued to innovate in the area of lawyer wellness, with the Tava Health program continuing to be a well-used and over-subscribed success story. The public benefits when Utah's lawyers are not only physically well, but also mentally fit. The Utah Bar is a leader in attorney wellness.

Finally, a special thank you to the Utah Supreme Court, who worked closely with Bar leadership, to make sure that the Bar is fiscally responsible, and that the Utah State Bar is acting in way that is consistent with the separation of powers inherent in our Utah Constitution. I enjoyed my service as Utah Bar President and look fondly back on the accomplishments of the Utah State Bar, its staff, commissioners, and committees.



Erik A. Christiansen
President

BY THE **NUMBERS**



10,792	Active attorneys
3,457	Inactive attorneys
1,047	Certificates of Good Standing
215	1st Division Attorneys
994	2nd Division Attorneys
5,470	3rd Division Attorneys
1,482	4th Division Attorneys
588	5th Division Attorneys
2,043	Out-of-State Attorneys
738	Ethics hotline calls received
11,268	LicensedLawyer.org legal requests
49,056.5	Hours of verified (live) CLE credit
347.70	Hours of pro bono work for CLE credit with 32 elective CLE credits issued
3,733	Virtual legal clinic cases requested
2,844	Virtual legal clinic assistance provided
6,430	Attorneys belong to 38 sections
800	Attorneys serve as NLTP mentors

LICENSEE **SNAPSHOT**

Sections	Number of Licensees
Anti-Trust	53
Appellate	331
Banking & Finance	261
Bankruptcy	240
Business Law	770
Cannabis Law	58
Collection	127
Community Assoc	58
Constitution	128
Construction	294
Corporate Counsel	932
Criminal	525
Cyber	255
Dispute Resolution	208
Education	140
Elder	206
ENREL	279
Entertainment	76
Family	770
Franchise	28
Government	517
Health	200
Indian	71
Intellectual Property	697
International	163
Juvenile	187
Labor & Employment	468
Limited Scope	15
Legal Entrepreneur	38
Litigation	1803
Military	42
Non Profit	114
Probate/Estate Planning	676
Real Property	854
Securities	271
Small Firm	174
Senior	27
Tax	302
Total	**12,358**

66.16%
MALE



25.33%
FEMALE



17% **36 OR YOUNGER**

39% **37-49 YEARS OLD**

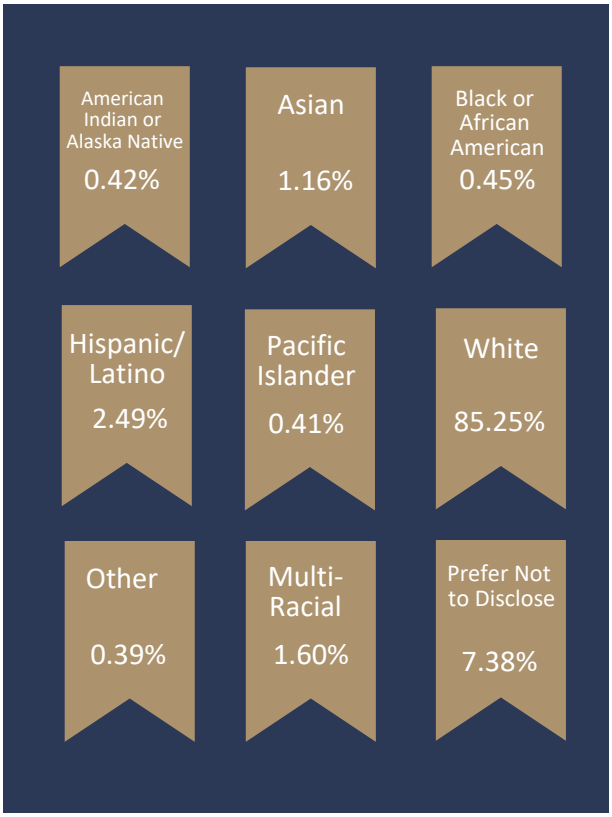
20% **50-59 YEARS OLD**

19% **60-74 YEARS OLD**

3% **75 OR OLDER**

2% **PREFER NOT TO DISCLOSE**

NOTE: Age data based off 2022 Bar Survey



VISION & **MISSION**

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

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

MESSAGE FROM THE **EXECUTIVE DIRECTOR**

I am pleased to present the Utah State Bar's **Year In Review** for the 2023-2024 fiscal year. The Bar continues to leverage its financial resources to support the needs of its licensed attorneys, serve the public, and promote the fair administration of justice. Notably, we have maintained attorney licensing fees without increases since 2009, while continuing to improve services and expand programming.

We remain committed to providing affordable, high-quality CLEs nearly every business day. Our Spring Convention and Fall Forum attracted record attendance, delivering a variety of engaging CLE programs and excellent networking opportunities for our attorneys.

During the legislative session, we kept our licensees informed with daily updates on bills and initiatives that could impact the legal profession. We are also committed to keeping our licensees well-informed about legislation relevant to their practice areas.

The Bar continues to prioritize the well-being of our licensees. We encourage licensees to utilize free counseling services through TAVA, a comprehensive mental health provider offering accessible, high-quality support. Additionally, we offer CLE programming focused on wellness and strategies for managing the challenges of a legal career.

In service to the public, the Bar remains dedicated to advancing access to justice, particularly for underserved communities. Our Access to Justice Office coordinates pro bono opportunities, connecting volunteer attorneys with clients in need across the state. We collaborate with courts, legal services organizations, law schools, and social services agencies to enhance the delivery of legal aid. Notably, we integrated the Court's Sandbox Program into the Bar this year. The Sandbox, focused on access to justice initiatives, aims to foster innovative legal services for underserved Utah residents. We are fortunate to have two exceptional staff members ensuring the success of this program.

On behalf of the Bar, I extend my heartfelt thanks to our licensees, Commissioners, staff, and volunteers for their dedication and hard work. Your commitment to the legal profession and the core values we uphold is truly inspiring. Thank you for your continued support and engagement. Together, we will continue to make a lasting impact on our profession and our community.



Elizabeth Wright
Executive Director

ADMISSIONS & **LICENSING**

APPLICATIONS FOR ADMISSIONS 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 Michael Barnhill, Co-chairs)**, **Character and Fitness Committee (Michael Barnhill and Melinda Bowen, Co-Chairs)**, **Bar Examiner Committee (Abby Dizon-Maughn and Nathan Gallegos, Co-Chairs)**, and the **Test Accommodation Committee (Joan M. Andrews, Chair).**

Non-Exam Attorney Application for Admission

Special admissions include reviewing and processing Military Lawyers, House Counsel, Admission on Motion and Pro Hac Vice applications. During the Fiscal 2023–2024 year, we received the following special admissions applications:

	APPLICATIONS	ADMISSION-ELIGIBLE	YEAR-END PENDING	DENIED	WITHDRAWN
MILITARY	0				
HOUSE COUNSEL	25	30	6	0	3
MOTION	152	159	23	1	6
UBE TRANSFERS	162	120	28	3	9
PRO HAC VICE	442				



Emily Lee
Deputy General Counsel
for Admissions

July 2023 Bar Examination Statistics

266 Bar Examinees → **245 Successful Examinees** → **94% Pass Rate**

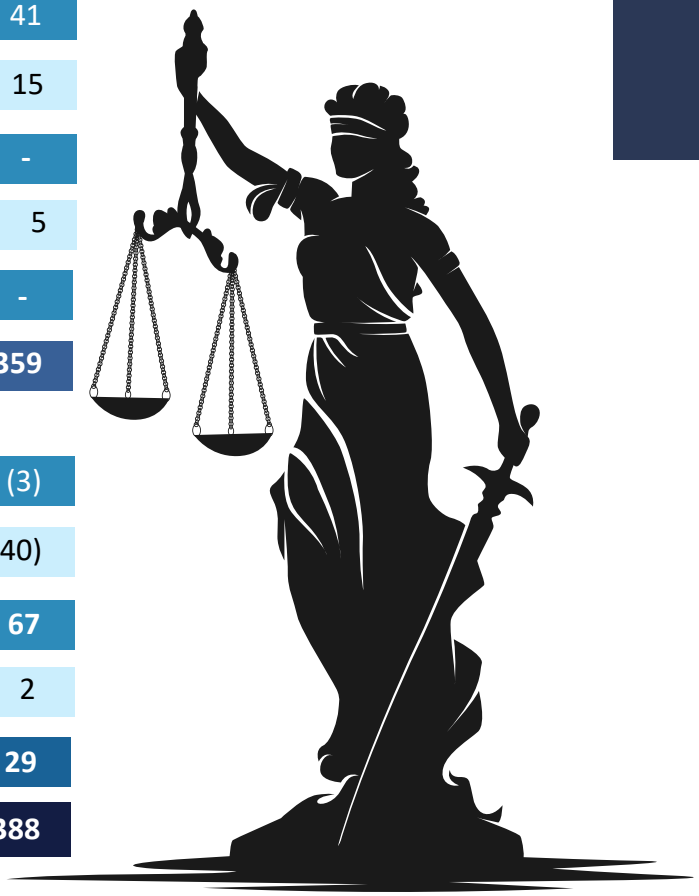
February 2024 Bar Examination Statistics

94 Bar Examinees → **63 Successful Examinees** → **68% Pass Rate**

ADMISSIONS & **LICENSING**

LICENSING STATISTICS

STATUS	2022-23	2023-24	CHANGE
Active	9,221	9,432	211
Active under 3 years	686	773	87
Active Emeritus	366	407	41
In House Counsel	129	144	15
Foreign Legal Counsel	4	4	-
LPPs	27	32	5
Miliary Spouse	-	-	-
Subtotal - Active	**10,433**	**10,792**	**359**
+			
Inactive - Full Service	835	832	(3)
Inactive - No Service	2,050	2,010	(40)
Inactive Emeritus	531	598	**67**
Inactive House Counsel	12	14	2
Subtotal - Inactive	**3,428**	**3,457**	**29**
Total Active & Inactive	**13,861**	**14,249**	**388**





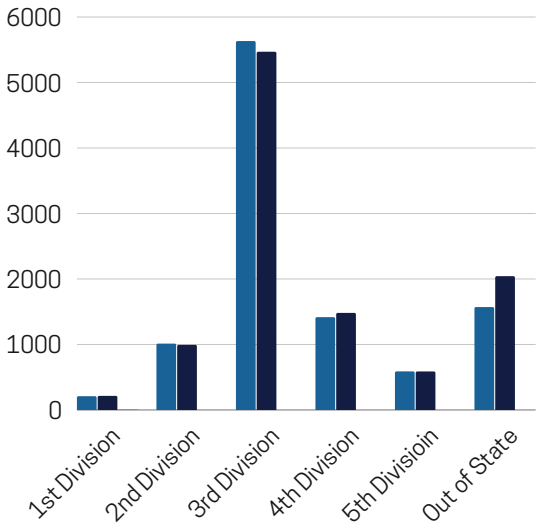


ADMISSIONS & **LICENSING**

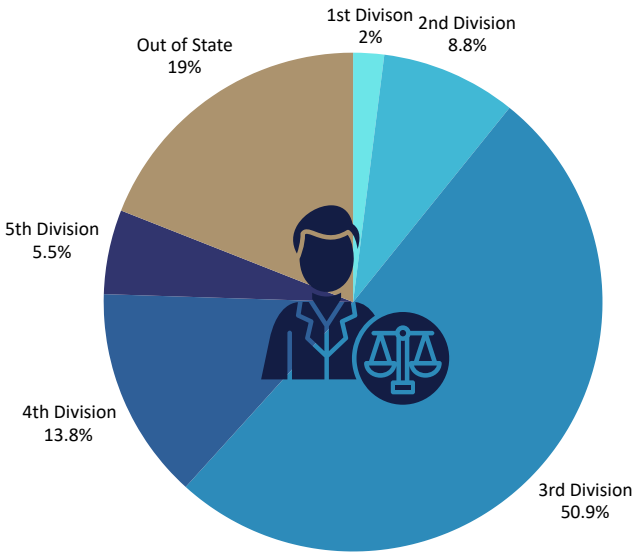
LICENSING STATISTICS CONTINUED

ACTIVE ATTORNEYS BY REGION			
1st Divison (Logan-Brigham)	210	215	5
2nd Division (Davis - Weber)	1,013	994	(19)
3rd Division (Salt Lake)	5,633	5,470	(163)
4th Division (Utah)	1,417	1,482	65
5th Division (Southern Utah)	589	588	(1)
Out of State	1,571	2,043	472
Total Active Attorneys	**10,433**	**10,792**	**359**

GROWTH BY DIVISION - 2022-23 TO 2023-24



ACTIVE ATTORNEYS BY REGION



"The good of the people is the greatest law."
- Cicero



LICENSED PARALEGAL **PRACTITIONERS**

Over the 2023-2024 fiscal year, the Licensed Paralegal Practitioner (LPP) administrator continued to work to implement the LPP exam application into the same system as the attorney application system. In 2025, this will be fully integrated, making the application process easier for applicants and more streamlined for the review process within the admissions department.



LPP Program from July 1, 2023 to June 30, 2024	
Applicants: August 2023: 5	March 2024: 4
Number of LPPs admitted between July 1, 2023 to June 30, 2024: 8	

LPPs practice across the state. LPPs are based in **12 different counties:** Beaver, Box Elder, Cache, Davis, Millard, Sanpete, Salt Lake, Summit, Tooele, Washington, and Weber. The roster of LPP may be found by clicking on the Licensed Paralegal Practitioner tab on ***licensedlawyer.org***.

The LPP Steering Committee, a Utah Supreme Court committee, now chaired by attorney L. Monte Sleight, has maintained an active agenda. The committee continues to explore potential rule changes to expand the scope of practice, as well as possible broadening of qualifying educational requirements for new LPPs.

The LPP Admissions Committee, a Utah State Bar committee, reviews applications prior to each exam administration. The LPP exams are offered twice a year in March and August.



LPPs

36 Active

3 Inactive

NEW LAWYER **TRAINING PROGRAM**

The New Lawyer Training Program (NLTP) was implemented under direction from the Utah Supreme Court in 2009. The program is mandatory for all new Utah attorneys who have less than two years of practice experience. The program is overseen by the NLTP/LPP Administrator with the help of the Utah State Bar Committee on New Lawyer Training (NLTP Committee). The committee is chaired by Utah 7th District Court Judge Jeremiah Humes and Attorney Lauren Schultz. The committee meets monthly to review and approve new mentor applications and to discuss possible changes to the model mentoring plan.

Over **3,000 attorneys** have completed the NLTP since its inception. In early 2024 the NLTP switched from 2 to 3 sessions each year, January, March, and July. This change is to better account for the various times attorneys are being admitted to the Bar. Each session still runs for 12 months, with groups expected to meet at least 10 times to complete the required activities.

In May of 2024 UCJA Rule 11-604(b)(4) was amended and now attorney mentors receive six CLE credits per mentoring session instead of 12. This change is to reflect the overall MCLE compliance cycle change from reporting 24 credits every two years to 12 credits every year.

The NLTP Committee recognizes the hard work and sacrifice our attorney mentors and new attorneys give to make this program successful. The aims to help new attorneys more quickly gain necessary skills and competencies and increase connections within the legal community. We encourage any attorneys with 7 years or more of experience and no public disciplinary issues consider applying to be a mentor in the NLTP. We welcome skill and expertise in helping guide the future of Utah's legal profession.

More than

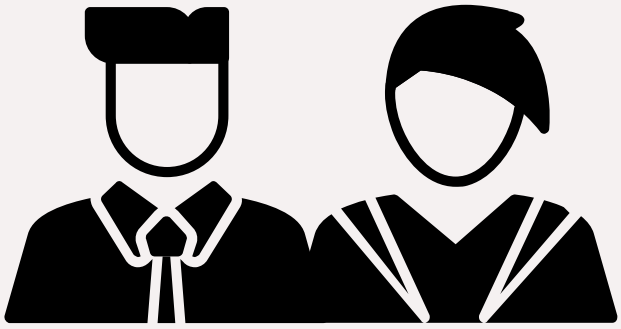
3,000

ATTORNEYS

have completed the

NLTP program over

14 years



CONTINUING
LEGAL EDUCATION

The CLE Department of the Utah State Bar has demonstrated a robust commitment to professional development and engagement, offering **246 unique CLE events** this year. Of these, 195 were dedicated to academic sessions, while the remaining 51 included section meetings, socials, committee gatherings, and policy discussions tailored to practitioners.

Collectively, these events saw the participation of over **18,000 attorneys** and paralegals from across Utah and the United States, covering more than 50 diverse areas of legal practice.
In total, the department administered an impressive **49,056.5 hours of verified (live) CLE credit**, both to Bar licensees and guest attendees, while an additional **2,349.5 hours of video replays** were completed by licensees through our CE21 partnership. Weekly Zoom-based one-hour CLE sessions, along with near-daily hybrid in-person events, have enabled broad access to CLE content, promoting convenience and inclusivity for participants statewide and beyond.

Notable expansions this year included the launch of focused CLE series, such as the Law Enforcement Series 2023—incorporating insights from local, state, and federal law enforcement—and the Procrastinators' CLE Series, which engaged 2,531 lawyers in June alone. The CLE Department also contributed to outreach initiatives with Utah's law schools through the "All Rise Utah" program, promoting rule of law and access to justice.

Collaboration remains a cornerstone of our approach, as demonstrated through partnerships with Bar sections, the **CLE Advisory Board (Jonathan O. Hafen, Chair)**, and organizations like Women Lawyers of Utah, the Utah Minority Bar Association, and the Utah Center for Legal Inclusion. By working with all 40 Bar sections and divisions, as well as key Utah State Bar Committees, the CLE Department has maintained an inclusive and responsive approach to continuing legal education, ensuring our licensees gain access to relevant, high-quality learning experiences.



Michelle Oldroyd
Director of Professional Education



A panel discussion with all of the female justices of the Utah Supreme Court, moderated by Judge Michele Christiansen Forster of the Utah Court of Appeals.

BAR PROGRAMS & **SERVICES**



Law Day – Celebrated May 3rd, 2024

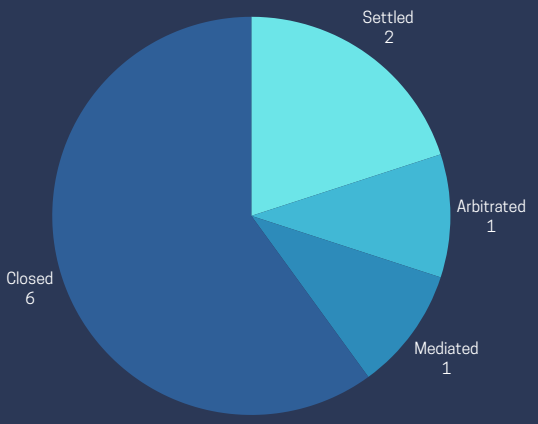
On May 3, 2024, the Utah legal community gathered at the Grand America Hotel to celebrate Law Day. Over **267 attendees**, including students, teachers, and community members, joined to honor the rule of law and promote access to justice. The 2024 theme, *"Voices of Democracy,"* marked the 50th anniversary of Utah Law Related Education and celebrated its retiring director. The event included discussions on civic duty, the 60th anniversary of the Civil Rights Act, and the importance of voting and jury duty. Throughout May, lawyers visited classrooms, and lesson plans were provided online to deepen Law Day's impact for Utah students.

Fund for Client Protection

The **Fund for Client Protection Committee (Stephen W. Farr, Chair)** has 11 attorney members, and one bar-staff liaison. There were **8 claims** made to the Utah State Bar Fund for Client Protection against **6 attorneys** during the 2023–2024 fiscal year **totaling $56,988**. **All 8 claims were approved for awards totaling $52,300**. 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*.

Fee Dispute Resolution Program

In the last fiscal year, the **Fee Dispute Resolution Committee (Jake Pate, 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 one bar-staff liaison. Last year, the committee opened **20 cases**, **settled 2**, **arbitrated 1, and 4 case was mediated.** Six cases closed because respondent was not willing to participate. A link to more information may be found at *http://www.utahbar.org/public-services/fee-dispute-resolution-program.*

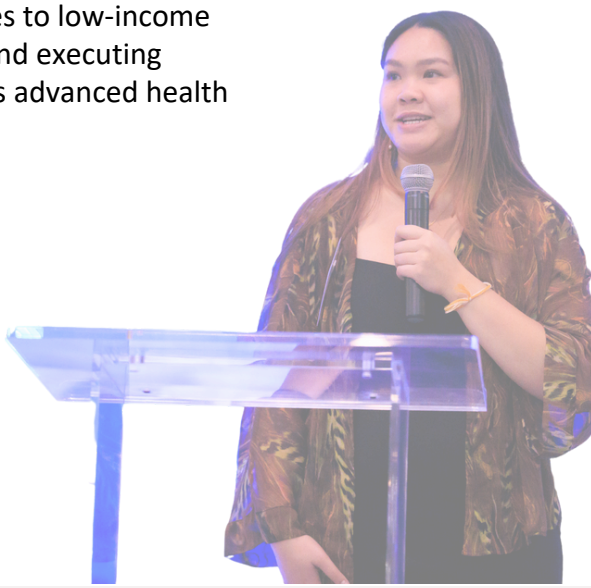


MORE BAR PROGRAMS & **SERVICES**

The Utah Young Lawyers Division (YLD) is the Bar's program designed to support new attorneys. YLD offers its members valuable resources, including service opportunities, career development tools, community engagement initiatives, networking events, and programs to enhance legal skills. All newly admitted members of the Bar automatically join YLD and gain instant access to its benefits and programs.

In 2023-24, YLD offered several service programs to benefit the community:

- **Wills for Heroes:** Provides free wills, living wills, and healthcare and financial powers of attorney to first responders and their spouses or partners. These events occur every other month at various first responder departments or agencies across Utah.
- **Serving Our Seniors:** Offers pro bono services to low-income senior citizens, assisting them in preparing and executing essential estate planning documents, such as advanced health care directives and powers of attorney.
- **Project Street Youth:** Collaborates with Volunteers of America to educate and raise awareness about issues facing homeless youth.
- **Veterans Clinic:** Aims to improve Utah veterans' access to justice by holding monthly legal clinics.
- **ALIGHT (Mobilizing Justice for Human Trafficking Survivors)**: Works with pro bono attorneys to advocate for the rights of local human trafficking survivors.



Ezzy Khaosanga
YLD President-Elect



David Clark
IT Director

TECHNOLOGY SUPPORT

The Bar's IT team remains dedicated to enhancing the technological services that benefit licensees. Recent advancements include migrating the Association Management System, ClearVantage, to the cloud for improved accessibility, optimizing remote access capabilities, and upgrading the Bar's phone system to ensure seamless communication. The team has also invested in a new copier for the Office of Professional Conduct (OPC), upgraded cybersecurity software, and provided cybersecurity training to safeguard sensitive information. Additionally, IT continues to engage with Bar Sections to improve their websites and listservs, ensuring efficient and secure member communication. These upgrades reflect the commitment to supporting Utah lawyers with reliable and innovative technology solutions.

ETHICS & PROFESSIONAL CONDUCT

PROFESSIONAL CONDUCT ENFORCEMENT

The **Ethics & Discipline Committee, chaired by Christine Greenwood**, reviews cases involving alleged violations of the Rules of Professional Conduct, with options to dismiss, issue a reprimand, or pursue district court action. The **Utah State Bar Ethics Advisory Opinion Committee, led by Sara Bouley**, issues advisory opinions on ethics matters, while the **Supreme Court Rules of Professional Conduct Committee, chaired by Cory Talbot,** recommends ethical guidelines for the legal profession.

The **Office of Professional Conduct (OPC)** handles complaints of unethical behavior, offers ethics education, and prosecutes or resolves cases before panels, district courts, and the Utah Supreme Court. The **OPC Oversight Committee, led by Arthur Berger**, provides administrative oversight and reports to the Supreme Court.

Note: In May 2024, Christine Greenwood was appointed to serve as OPC's Chief Disciplinary Counsel. Beth Kennedy was subsequently appointed as the Chair of the Ethics & Discipline Committee of the Utah Supreme Court.

UTAH STATE BAR ETHICS HOTLINE

Since September 2020, the **Utah State Bar's Ethics Hotline** has provided informal ethics guidance to Utah lawyers, addressing hundreds of inquiries. Lawyers and Licensed Paralegal Practitioners (LPPs) can reach out any business day by emailing *ethicshotline@utahbar.org*.

The General Counsel's office has also offered ethics guidance on topics like the COVID-19 pandemic, cybersecurity, and disaster preparedness. Resources, including an Ethics FAQ, an archive of Ethics Advisory Opinions, and instructions for submitting formal Ethics Opinion requests, are available online.



Beth Kennedy
Ethics Counsel

738 Inquiries

ACCESS TO JUSTICE **INITIATIVES**

The Access to Justice Office at the Bar, in conjunction with the Pro Bono and Access to Justice Commissions, remained steadfast in its mission to enhance legal resources and assistance for moderate and low-income Utahns in need. In 2023-24, the office prioritized expanding access to justice through its established Signature Programs while emphasizing collaboration with the private bar and local nonprofits. By strengthening partnerships and fostering relationships within the community, the office aimed to broaden its outreach and ensure that underserved populations have greater access to vital legal support and resources.

These collaborations allowed for targeted outreach efforts, such as co-hosting legal clinics, sharing resources, and providing education on legal rights for a myriad of subjects. By working closely with trusted community organizations, the office was better able to identify and address specific local needs, ultimately increasing engagement and building trust within the populations it seeks to serve. The office is exceedingly grateful to the attorneys, legal professionals, and firms who contributed to bridging the justice gap in Utah.

To continue to meet increasing needs and improve the office's efforts, the Access to Justice Office expanded its team by hiring internally for the roles of Pro Bono and Outreach Manager as well as Trainings and Special Projects Manager.

The Access to Justice Office continues to provide direct legal support through initiatives such as the **Virtual Legal Clinic, Utah Free Legal Answers, and the Pro Se Calendar Volunteer Program**. These programs address critical legal needs while fostering collaboration with community organizations and legal professionals. The most requested practice areas were Criminal Defense, Landlord/Tenant, and Debt Collection.

VIRTUAL LEGAL CLINIC

The Virtual Legal Clinic (VLC), which replaced the Tuesday Night Bar, continues to grow more and more each year. The program offers participants the opportunity to meet with attorneys virtually, either by phone or email, for brief legal advice.



As a result, the program assisted **3,092 individuals**, up from **1,307 participants**. This was a notable increase compared to previous years and also saw higher numbers in more rural areas.

Megan Connelly
Director, Access to Justice

ACCESS TO JUSTICE **CONTINUED**

UTAH FREE LEGAL ANSWERS

This online service, administered in partnership with ABA Free Legal Answers, enables pro bono attorneys to provide civil legal advice to questions submitted by eligible participants. In 2023–2024, **94 attorneys** offered assistance to **317 individuals**. The most frequently addressed issues included family law, housing, and debt-related matters. This year the Access to Justice Office expanded this program by creating Free Legal Answers Power Hours in collaboration with The University of Utah's-SJ Quinney College of Law, to allow law students the opportunity to engage and participate under the program with the mentorship of volunteer attorneys.

Through these programs, the Utah State Bar continues to make meaningful progress in providing justice for underserved communities and supporting Utah's legal professionals in giving back to their communities.

PRO SE CALENDAR VOLUNTEEER PROGRAM

The Access to Justice Office provides limited scope legal representation under the Pro Se Debt Collection Calendar by providing limited scope representation to individuals in need of assistance with debt collection matters. These individuals are often in urgent need of legal advice and representation, as many appear at their initial hearings self-represented, with little to no understanding of how to defend themselves or their rights in these cases. This lack of knowledge frequently leads to default judgments and increased debt amounts. The Access to Justice Office manages this program closely with the courts to ensure these individuals have the opportunity to consult with an attorney, gain clarity on their legal rights, and better understand their situations.

Working tirelessly alongside volunteer attorneys every week, the Access to Justice Office strives to amplify the voices of these individuals, equipping them with the tools and information they need to navigate the challenges they face. In 2023–2024, **84 attorneys and law students** donated their time to assist individuals with debt collection cases. These volunteer attorneys make this program possible as the demand for assistance under this program continues to increase each year.

MODEST MEANS LAWYER REFERRAL PROGRAM

The Modest Means Lawyer Referral Program connects individuals to attorneys offering reduced-rate services. In 2023–2024, the program facilitated **360 referrals** to attorneys who provide services at rates between $50–$75 per hour based on the applicant's income level. These efforts were bolstered by outreach to over **63 attorneys**, ensuring continued access to affordable legal representation for those in need.

PRO BONO COMMISSION

The Pro Bono Commission (PBC), **co-chaired by Judge Michele Christiansen Forster and Judge Angela Fonnesbeck**, plays a critical role in supporting statewide pro bono efforts. In collaboration with the Access to Justice Office, the PBC promotes innovative programs such as Bar Signature Programs and Pro Bono Case Circulation (Check Yes Program). The Commission also works to expand access to justice by engaging licensed paralegal practitioners and legal professionals across the state.

FALL FORUM, SPRING & **SUMMER 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.

UTAH STATE BAR FALL FORUM

The 2023 Fall Forum took place in person on November 17 at the Little America Hotel, drawing a sold-out crowd of over **300 practitioners** for the second consecutive year. The theme, "Professionalism & Adapting to AI," highlighted the evolving role of technology in law. Keynote speaker Honorable Paul Grimm from Duke University Law School addressed public trust in the courts. CLE sessions featured legislative updates, ethics and practice tips, the Dignity Index, digital marketing, social media for lawyers, and the future impact of AI on the profession. Additionally, **110 attorneys attended the 2023 Litigation Trial Academy** for hands-on skills training led by esteemed practitioners and judges.

The theme of our event was *"Professionalism & Adapting to AI: Oh, How our Practice Stays the Same, and Oh, How It Changes!"* Our keynote speaker was the Hon. Paul Grimm, from Duke University Law School, sharing about public and practitioner trust and confidence in our courts. For the CLE sessions of the Fall Forum, we included updates from our lawyer legislators and the forthcoming legislative session, practice tips and ethics advice from our bench, the Dignity Index and improving dialogue, digital marketing and social media for lawyers, as well as the future of AI and its influence on practitioners.

Spring Convention in St. George

We were pleased to see **110 attorneys** join the Litigation Trial Academy in 2023 for practical skill building and real-time practice scenarios with some of our most venerated practitioners and judges serving as faculty for the Academy.

Utah State Bar. Summer Convention

During this fiscal year, the first convention event was the **2023 Summer Convention**, which was held virtually via Zoom, over nine different CLE sessions. The event was held July 6 - August 31, 2023, with **2,466 lawyers** in attendance over all of the different sessions. Notably, the Summer Convention included CLE sessions about lawyering skills and relationships that build longevity, ethics, business law skills, oral and appellate advocacy, mental health and the authentic experiences of practitioners, de-escalation of conflict and the role of law enforcement, our three co-equal branches of government and public trust and improving the well-being of our community.

LAWYER **WELL-BEING**

Bar Commission Priority: Lawyer Well-Being

The **Well-Being Committee for the Legal Profession (WCLP)** marks its fifth year as a permanent standing committee, dedicated to advancing the well-being of Utah's legal community. Over the past year, the WCLP has strengthened its collaboration with the Utah Supreme Court, the Utah Bar, and the MCLE Board, delivering advocacy, resources, and support tools to promote a healthier professional environment.

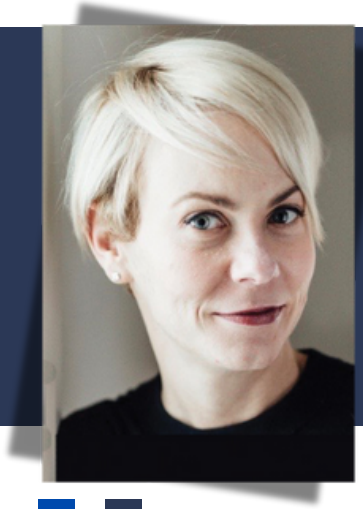
A key success this year has been the continued impact of the Bar's partnership with **Tava Health**, offering high-quality virtual mental health services. Since Tava's launch on February 1, 2023, there have been **1,186 sign-ups** and **3,430 sessions** completed, reflecting the strong demand and value of accessible mental health support across the legal profession.

Additionally, the Utah Supreme Court eliminated mental health-related questions from the Utah Bar admissions application, ensuring applicants are assessed based on current fitness rather than mental health history. This decision, reached in collaboration with the WCLP and the Bar's Admissions Committee, reflects a commitment to reducing stigma and supporting future legal professionals.

Further advancing the cause of well-being in the legal profession, the Utah Supreme Court added Comment [9] to Rule 1.1 of the Rules of Professional Conduct. Comment [9] states, ***"Lawyers should be aware that their mental, emotional, and physical well-being may impact their ability to represent clients and, as such, is an important aspect of maintaining competence to practice law and compliance with the standards of professionalism and civility. Resources supporting lawyer well-being are available through the Utah State Bar."*** This addition underscores the critical link between well-being and professional competence, reinforcing that a lawyer's mental, emotional, and physical health is essential for the competent, ethical practice of law.

The WCLP and the MCLE Board also collaborated to refine the rule that allows well-being content to receive Continuing Legal Education (CLE) accreditation, providing greater clarity and encouraging the inclusion of well-being resources in professional development.

Over the past year, the WCLP has facilitated well over a dozen CLE programs and trainings in collaboration with the Utah Bar, Women Lawyers of Utah, University of Utah Law School, BYU Law, Lawyers Helping Lawyers, the Office of Professional Conduct, LGBTQ+ and Allied Lawyers of Utah (LALU), the Utah Center for Legal Inclusion (UCLI) and various Bar sections, including litigation, family law, young lawyers, business law, real estate law, and the paralegal division. These partnerships have expanded access to well-being-focused CLE offerings across diverse legal specialties.



3,430 Sessions

1,186 Sign Ups

Martha Knudson
Director, Well-Being Committee for the Legal Profession

PUBLIC OUTREACH & **COMMUNICATION**



In the 2023–2024, the Bar continued its significant overhaul of the website to improve the user experience. The new design features a more intuitive layout, streamlined navigation, and enhanced accessibility, making it easier for users to find information and resources. There were **375,263 page views** with **1.2 million times a user triggered an event on the site.**

Additionally, the Bar introduced the Professional Development Office webpage, offering comprehensive resources on starting, managing, and transitioning out of legal practice. This includes checklists, templates, and guidance to assist attorneys at various career stages.

Lastly, ongoing improvements continue on the website to serve as a valuable tool that offers updates and enhancements based on licensee feedback. We aim to deliver meaningful and engaging content. Whether accessing CLE opportunities, staying informed on legislative updates, or finding networking opportunities, ***utahbar.org*** evolves to provide an efficient and reliable resource for Utah's legal community.

375,263 Page Views

2023-24 Social Media Following

1,800 **1,466** **749** **1,715** **98**

The Bar's social media presence plays a crucial role in connecting with both the public and its licensees. By actively sharing updates, resources, and insights across these platforms, the Bar strengthens its brand recognition and builds awareness of its mission and services.

5,825 Total Followers



The eBulletin is a vital resource sent twice a month to keep licensees informed, engaged, and empowered. Packed with essential updates, it provides timely information about CLE opportunities, upcoming events, awards and recognitions, nominations, appointments, and more.

53% Open Rate
3% Click Rate



Utah Bar Journal

The Utah Bar Journal (UBJ) publishes articles of practical interest to Utah attorneys. UBJ 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 21 members** and a bar staff-liaison. Access to issues of the Journal are at *barjournal.utahbar.org*.

SUPPORT **SERVICES**

+2 MILLION SEARCHES Since 2017

LicensedLawyer.org is a vital resource for Bar licensees, offering a powerful platform to connect attorneys with potential clients seeking legal services. This user-friendly website serves as a trusted directory where lawyers can showcase their expertise, practice areas, and credentials, enhancing their visibility and accessibility in the community. The platform strengthens the bond between the legal community and the public, aligning with the Bar's mission to promote access to justice and uphold the integrity of the profession.

63,177 PROFILE VIEWS

11,268 REFERRALS

Utah Regulatory Sandbox Project

In 2023, the Bar expanded its toolkit to address the access-to-justice crisis and to foster legal innovation. In July 2023, the Office of Legal Services Innovation of the Utah Supreme Court transitioned part of its operations into the Utah State Bar and added new policy requirements, following months of feedback and input from stakeholders. To staff the office and support its operations, the Bar hired a program director and program manager.

The Office of Legal Services Innovation was created in 2020 through Standing Order No. 15, which established the Utah legal regulatory sandbox (the "Sandbox") and Legal Services Innovation Committee. The Sandbox is a pilot project and one-of-a-kind experiment allowing for nontraditional entities to provide legal services and submit data. The results of this experiment will inform the Utah Supreme Court's future decisions governing the practice of law in Utah.

In 2024, the Utah Supreme Court announced additional policy changes, the most substantial of which is the Utah Innovation Requirement. To meet the Utah Innovation Requirement, Sandbox participants must show that authorization will allow them to reach Utah consumers currently underserved by the legal market.

Consumer Assistance Program

The Bar's Consumer Assistance Program (CAP) provides informal support to consumers and attorneys to resolve minor complaints and improve communication. Common issues include unreturned calls, lack of case updates, billing concerns, and access to client files. CAP strives to resolve these issues before they escalate, offering consumers guidance on reasonable expectations from their attorneys and the legal process.

CAP also connects consumers to other Bar services, such as Access to Justice, Fee Dispute Resolution, and the Fund for Client Protection, and directs them to external resources like Utah Legal Services and the Utah Courts' self-help website.

In the 2023–2024 fiscal year, CAP opened **717 files (78% civil, 11% criminal)**, contacted attorneys in **73 cases**, and handled **865 phone and in-person consultations**. While CAP could not assist in 82 cases, explaining why helped consumers better understand their situations.

717 Files

BAR LEADERSHIP & **GOVERNANCE**

The Bar is a 501(c)(6) non-profit Utah corporation governed by a 15-member Board of Bar Commissioners, which includes two court-appointed public members, 12 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 12 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 2023–2024 year, the Bar Commission included the following:



SECTION & DIVISION **CHAIRS**

Highlighting the involvement of our practitioners in service to their colleagues and our legal community, please find below, a list of the leaders of our forty practice area sections and divisions.

Lara Swenson
Antitrust Law

Alexandra Mareschal
Appellate Practice

Michael O'Brien
Banking & Finance

Michael Read
Bankruptcy

Chad Pehrson
Business Law

Hannah Follender
Cannabis Law

J.D. Lauritzen
Cannabis Law

Spencer Lythgoe
Collection Law

Isaac James
Community Association Law

Jason Groth
Constitutional Law

Shane Peterson
Construction Law

Kate Copperud
Corporate Counsel

Jonathan Nish
Criminal Law

Kent Davis
Cyberlaw

Dustin Hardy
Dispute Resolution

Platte Nelson
Education Law

Deborah Bulkeley
Elder Law

Derek Julio
Entertainment Law

Jeff Gittins
Environmental Law

Joshua Rogers
Estate Planning

Julie Nelson
Family Law

C. Christian Thompson
Franchise Law

Elliott Lawrence
Government & Administrative Law

Kristy Kimball
Health Law

Melinda Dee
Indian Law

Phillip Harris
Intellectual Property

Cliff Blair
International Law

Alexandra Mareschal
Juvenile Law

Tanner Bean
Labor & Employment Law

Ben Lear
Legal Entrepreneur Law

Matthew Bell
Limited Scope Law

R. Jeremy Adamson
Litigation

J. Ed Christiansen
Military Law

Blake Voorhees
Nonprofit

Jennifer Carver
Paralegal Division

Kenton H. Walker
Real Property

Betsy Voter
Securities Law

Clayton Simms
Small Firm

Nathan Firouzi
Tax Law

Ezzy Khaosanga
Young Lawyers Division



BAR EVENT **SPONSORS**

We extend our heartfelt gratitude to the sponsors of our events. Their generous support ensures we can provide valuable resources, foster professional development, and host impactful gatherings that strengthen our legal community. Together, we advance access to justice and uphold the highest standards of professionalism in the legal field.

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PARSONS BEHLE & LATIMER

RQ&N

PARK CITY Bar

PAHOYA

SNOW JENSEN & REECE
ATTORNEYS AT LAW

Snell & Wilmer
LAW OFFICES

STRONG & HANNI
LAW FIRM

UTAH BAR FOUNDATION

BUSINESS LAW SECTION

HEALTH LAW SECTION

LABOR AND EMPLOYMENT LAW SECTION

STRATEGIC PLAN
OVERVIEW - 2023-2025

The lawyers of the Bar serve the public and legal profession with excellence, civility, and integrity. We envision a just legal system that is understood, valued and accessible to all.

Strategic Goal #1

Advance the Critical Role a Unified Bar Plays in Public Protection

Legislative Activity

- Enhanced Legislative Relationships
- Grassroots Readiness
- Greater Inclusion, Impact and Awareness in the Process
- Increased Number of Lawyer/Legislators

Judicial / Supreme Court Alignment

- Executive Excellence on Current Initiatives (i.e. Sandbox)
- Continued Collaboration, Communication

Strategic Goal #2

Enhanced Connection to Key Bar Communities

Collaboration and Support of Utah-Based Affinity Groups

- Serve as Cohesive Fabric Among Communities Where Lawyers Aggregate
- Assess Needs / Provide Support
- Learn from Affinity Groups

New Lawyer Support

- Review / Assess Current Value Proposition
- Expand Support Where Most Desired (i.e. Networking Events / Professional Development)

Strategic Goal #3 Advance Bar Member Awareness on Trending Legal Topics

Provide Bar Licensees Fluency to Navigate Evolving Legal Landscape

- Generative AI Advancements
  - What is it; Use Impacts; Risks; Impact Potential on Legal Services Delivery
- DEI Decision Impacts
  - Potential Impacts on Existing Programs; How to Navigate; What it Means for Clients

Strategic Goal #4 Assess Long-Term Bar Communication Needs

Educate Licensees on Bar Value / Relevancy; Promote Engagement

- Micro-Segmentation Potential
  - Communication / Content Journeys Specific to Bar Licensees Professional Journey
- Gap Analysis
  - Where Do We Excel? Where Can We Do Better? How is Content Being Consumed Differently? How Are We Responding?

AWARDS

Judge of the Year - Hon. Suchada Bazelle

Lawyer of the Year - Margaret D. Plane

Committee of the Year - Character & Fitness Committee

Section of the Year - Young Lawyers' Division

Community Member of the Year - Kaitlyn Pieper

Professionalism Award - Hon. George M. Harmond, Jr.

Dorathy Merrill Brothers Award for the Advancement of Women in the Legal Profession - Hon. Diana Hagen

Raymond S. Uno Award for the Advancement of Minorities in the Legal Profession - Hon. Shauna Graves-Robertson

Charlotte L. Miller Mentoring Award - Rebecca A. Ryon

James B. Lee Mentoring Award - Hon. Augustus G. Chin

Paul T. Moxley Mentoring Award - Phillip W. Lear

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