

VISION OF THE UTAH STATE BAR

Lawyers creating a justice system that is understood, valued, respected, and accessible to all.

MISSION OF THE UTAH STATE BAR

To lead Utah lawyers in serving the public and the legal profession by promoting justice, professional excellence, civility, ethics, and respect for and understanding of the law.

2013 – 2014 COMMISSION PRIORITIES

1. Promoting public and lawyer education;
2. Promoting a fair and impartial judiciary;
3. Promoting access to justice and affordable legal services;
4. Studying the future of the practice of law in Utah and how it will be affected in the coming years by technology, market conditions, age, diversity, law school policies, etc., and how the Bar can provide additional technology training and career development for our membership;
5. Providing greater group benefits to members.

(over)

UTAH STATE BAR STATEMENT ON DIVERSITY AND 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, and races and religions. Inclusion is critical to the success of the Bar, the legal profession and the judicial system.

The Bar shall strive to:

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

UTAH STATE BAR AWARDS

<u>AWARD</u>	<u>CHOSEN</u>	<u>PRESENTED</u>
1. Dorothy Merrill Brothers Award Advancement of Women in the Law	January/February	Spring Convention
2. Raymond S. Uno Award Advancement of Minorities in the Law	January/February	Spring Convention
3. Pro Bono Lawyer of the Year	April	Law Day
4. Distinguished Judge of the Year	June	Summer Convention
5. Distinguished Lawyer of the Year	June	Summer Convention
6. Distinguished Section of the Year	June	Summer Convention
7. Distinguished Committee of the Year	June	Summer Convention
8. Outstanding Pro Bono Service	September	Fall Forum
9. Distinguished Community Member	September	Fall Forum
10. Professionalism Award	September	Fall Forum
11. Outstanding Mentor	September	Fall Forum
12. Heart & Hands Award	October	Utah Philanthropy Day
13. Distinguished Service Award		As Needed
14. Special Service Award		As Needed
15. Lifetime Service Award		On Occasion

Utah State Bar Commission

Friday, December 6, 2013
Utah Law & Justice Center
Salt Lake City, Utah

Agenda

1. 9:00 a.m. President's Report: Curtis Jensen

- | | | |
|-----------------|-----|--|
| <i>10 mins.</i> | 1.1 | Recognize Adam Bevis and Sheridee Fleming at 10 Yr. Anniv. |
| <i>60 mins.</i> | 1.2 | Database Committee Report: Hon. David Nuffer (Tab 1) |
| <i>20 mins.</i> | 1.3 | Report on Deregulation of Court Reporters |
| <i>05 mins.</i> | 1.4 | Legislative Session Preparation |
| <i>10 mins.</i> | 1.5 | Report on Meeting with Ron Gordon of Com. on Crim. & Juv. Justice |
| <i>10 mins.</i> | 1.6 | Report on Meeting with Terrie McIntosh, Chair, Ethics & Discipline |
| <i>05 mins.</i> | 1.7 | Report on Meeting with Rules Committee on Advertising Rule |

Break

- | | | |
|-----------------|-----|--|
| <i>10 mins.</i> | 1.8 | Report on Disaster Preparedness Committee: Michelle Harvey |
| <i>10 mins.</i> | 1.9 | Report on YLD "30 for 30" Lawyer Referral Program: Michelle Harvey |

2. 11:30 a.m. Action Items

- | | | |
|-----------------|-----|--|
| <i>10 mins.</i> | 2.1 | Approve Database Committee Report |
| <i>10 mins.</i> | 2.2 | Appointment to Children's Justice Board (Tab 2) |
| <i>10 mins.</i> | 2.3 | Public Education Budget: Sean Toomey |

12:00 N. Lunch

3. 12:20 a.m. Information Items

- | | | |
|-----------------|-----|--|
| <i>10 mins.</i> | 3.1 | Modest Means Program Report: John Lund |
| <i>10 mins.</i> | 3.2 | Judicial Council Report: John Lund |

1:00 p.m. Adjourn

Consent Agenda (Tab 3)

(Approved without discussion by policy if no objection is raised)

1. Approve minutes of October 25th, 2013 Commission Meeting
2. Approve Client Security Fund Recommendations
3. Approve Formal Policy on E-Mail Distribution

(Over)

Attachments (Tab 4)

1. October Financial Statement
2. 2013 Fall Forum Survey

Calendar

2014

January 2	Election Notices Due		
January 23	Breakfast with Lawyer/Legislators	7:30 a.m.	Capitol Multipurpose Room
January 17	Executive Committee	12:00 Noon	Law & Justice Center
January 24	Commission Meeting	9:00 a.m.	S.J. Quinney College of Law
February 1	Election - Petitions, Statements, Photos Due		
February 4	Conference Call Re: Legislature	4:00 p.m.	
February 6-8	ABA Mid-Year Meeting		Chicago, Illinois
February 11	Conference Call Re: Legislature	4:00 p.m.	
February 18	Bar Day at the Legislature	9:00 a.m.	State Office Building Audit.
February 18	Conference Call Re: Legislature 4:00 p.m.		
February 25	Conference Call Re: Legislature 4:00 p.m.		
February 25-26	Bar Examination	8:00 a.m.	Law & Justice Center
March 7	Executive Committee	12:00 Noon	Law & Justice Center
March 13	SUBA Luncheon	12:00 Noon	St. George, Utah
March 13	Commission Meeting	1:00 p.m.	St. George, Utah
March 13-15	Spring Convention		St. George, Utah
March 20	Election Email Message Due		
March 26-29	Western States Bar Conference		Palm Desert, California
April 1	Election-Online Balloting Begins		
April 8-10	ABA Day in Washington		Washington, D.C.
April 15	Election-Online Balloting Ends		
April 16	Election-Ballots Counted		
April 18	Executive Committee	12:00 Noon	Law & Justice Center
April 25	Commission Meeting	9:00 a.m.	Law & Justice Center
May 5-6	Northwestern States Bar Conference		Seattle, Washington
May 19	Admission Ceremony	12:00 Noon	Abravanel Hall
May 29-31	Jackrabbit Bar Conference		Cody, Wyoming
June 6	Executive Committee	12:00 Noon	Law & Justice Center
June 13	Commission Meeting	9:00 a.m.	Law & Justice Center
July 11	Executive Committee	12:00 Noon	Law & Justice Center
July 16	Commission Meeting	1:00 p.m.	Snowmass Village, Colorado
July 16-19	Summer Convention		Snowmass Village, Colorado

Tab 1

Introduction:

The Utah State Bar Database Review Committee was established September 1, 2013 to assist the Bar staff and Bar Commission in evaluating options for Bar management software because the current provider BarAlliance has announced that it will be ending its association management operations in May 2014.

Committee Members:

The Committee consists of:

- Committee Chair Hon. David Nuffer;
- Ron Bowmaster, CIO Utah State Courts;
- David Clark, CIO, Kirton McConkie; and
- Douglas French, CIO, Ray Quinney & Nebeker

Charge:

The Committee was charged with reviewing the alternative migration paths below and to explore other possible options.

Background:

The BarAlliance system currently manages all the Bar's programs including licensing, education, administration, admissions and discipline. It is highly customized to the Bar's needs. It originated in software run by the Bar on a mini-computer in the 1980s. Currently, three bar associations other than Utah use the BarAlliance system.

Possible Migration Paths:

There are three possible migration paths:

1. Purchase and migrate the BarAlliance system to an in-house system and contract with local developers to repair, maintain and extend the system.
2. Contract with a developer to build a new custom system from scratch.
3. Purchase off the shelf association management system (AMS) to run primary business functions and integrate with separate off the shelf software to manage OPC, Admissions, Accounting, and Utah State Bar web services.

Of these migration options, the committee members believe that the third is the best. The first option is estimated to have an initial implementation cost of \$312,375. This implementation estimate is based on resolution costs for current known issues in the BarAlliance software, and

the requirement to create local or in-house expertise to transition and refine the software. It also would require a commitment for some management and integration services from BarAlliance which it is unwilling to provide. The second option involves many unknowns and open ended costs which might be difficult to control, and likely requires a very long transition period. BarAlliance may not be able to cooperate in this transition. The cost for a custom, hosted solution using Salesforce.com would include initial scope and needs analysis (6 weeks at a bid of \$20,000 from Salesforce.Com development partner Kyazma.), development costs (determined by the needs analysis) and would not include ongoing annual licensing costs for staff of around \$50,000 (if all staff require full SF licenses) and, ongoing annual portal licensing fees at 2,000 log-ins per month of approximately \$12,000 per year.

The software and implementation cost of the third alternative is:

• AMS Software (ClearVantage Implementation)	\$294,815.00
○ Payments accrue over 5 payment stages over the course of the implementation and includes a 22% discount of \$82,858.00	
• OPC Software (NewDawn)	\$147,451.00
○ Costs accrue over the course of the implementation project.	
• Admissions Software (Synergy Purchase)	\$51,150.00
• Accounting Software (in place- no new cost)	
• TOTAL IMPLEMENTATION COST	\$493,416.00

This total cost is high compared to software on the retail market. However, each of these packages is highly specialized and marketed to a small audience, resulting in the high costs which are typical in this market. Euclid has indicated some willingness to further discount that cost if some savings in migration if we are joined by other current BarAlliance users Nevada, Hawaii and Alaska.

The Bar is currently paying a little over \$100,000 per year for the BarAlliance subscription. The cost of the new systems would be about \$65,000 per year including their purchase and annual maintenance fees and hardware, if amortized over their 10 year operational life span.

BarAlliance Migration and Recommendation:

BarAlliance intends to exit the software market entirely when the current contract expires in May 2014 and has committed to some appropriate migration period following that date. BarAlliance CEO Sarah Spivey has stated that BA is committed to our smooth transition to another AMS solution and believes that migration may be reasonably accomplished in just a couple of months. Bar staff are not quite that optimistic about the commitment or the time required to complete a migration but believe that they can work together on a sufficient transition period which is acceptable to both parties. Ms. Spivey has had several conversations with the management of Euclid Technologies about taking over the association management systems for us, Alaska, Hawaii and Nevada. She has indicated on several occasions that Euclid would be an

appropriate vendor, capable of permitting a smooth a transition of the Bar's management and transaction systems.

Committee Recommendation:

The committee believes that the best investment for a longer-term data management and transaction processing solution would be to contract with (a) Euclid Technologies for the general AMS system; (b) New Dawn to provide case and document management system for OPC; and (c) Box Networks provide their Synergy application for the administration and applicant self-service software and database for Admissions. These three single point solutions would then be integrated for data exchange with each other with the current accounting system and with the new website for member transaction services.¹

Euclid Technologies is the proposed, option for AMS software for general Bar operations and transaction services. Euclid is an association management software provider located in Bethesda Maryland. Their AMS product is called ClearVantage. Euclid currently provides AMS solutions for a variety of trade associations across the country and includes a number of state and regional Bars (Colorado, Louisiana, South Carolina, Pennsylvania, Denver Bar, DC Bar, Alleghany County PA. Bar, and Orange County Bar.) As part of ongoing due diligence during this process Utah State Bar staff have stayed in contact with several of the other bar associations and they continue to find satisfaction with and recommend the Euclid solution.

New Dawn is a local development company that specializes in prosecution case management solutions. New Dawn has Bar Discipline experience in the Colorado Supreme Court Office of Attorney Regulation; the Texas State Bar; The Office of Chief Disciplinary Council, Missouri; and is currently implementing the State Bar of Arizona, the Attorney Grievance Commission of Maryland, and the Oklahoma Bar Association.

Box Networks is a network services and development company based in Kentucky. They provide an admissions process, records management and applicant self-services system named Synergy. Box has a paperless process which will provide better tools to applicants and greater staff efficiency while reducing the need for paper file storage and management. They currently provide this technology to Kentucky, Tennessee, and Nevada and have begun their implementation of Nebraska.

Each of these solutions offer strong process automation and reporting tools that will allow the Utah State Bar to continue to operate at current staffing levels and sustain the same rate of staff and membership growth and service demand. These recommendations will minimize the overall transition time, impact on staff, and reduce the amount of money expended to maintain dual systems during the transition preparation and migration.

¹ We recommend the "Synergy" Admissions product from Box Networks be purchased and implemented as an internal system rather than a hosted or cloud based service. This will reduce cost and for simplify and speed the integration and interaction of that module with the core AMS framework.

SIGNATURES

I fully agree with the statements above and feel that the Bar Commission would make a wise decision to move forward with our recommendation. There has been a lot of work put into this process. These vendors have the experience that the Utah State Bar needs in order to move forward with their technology needs.

David Clark

I concur with the remarks of David Clark.

Ron Bowmaster

I appreciated the opportunity to serve as a member of the Utah State Bar Database Review Committee. Thank You

Given the challenges in finding good, cost effective and long term solutions for complex software requirements the Utah State Bar Committee has made the best choice among the few options that were available

Doug French

I recommend the bar proceed with the third option and endorse all the contents of this memorandum.

David Nuffer

Tab 2

**UTAH BAR COMMISSION MEETING
AGENDA ITEM**

Title: Representative to the Children's Justice Center Board
Item: 2.2
Submitted by: John Baldwin
Meeting Date: December 6, 2013

ITEM/ISSUE:

The Bar Commission is soliciting applications from criminal defense attorneys to serve a four-year term on the Children's Justice Center State Advisory Board. The Children's Justice Program is administered by the Attorney General and was established pursuant to U.C.A. Section 67-5b-101, *et seq.* The Board advises the Utah Attorney General about the Children's Justice Program. The program provides a comprehensive, multidisciplinary, nonprofit, intergovernmental response to sexual abuse of children, physical abuse of children, and other crimes involving children where the child is a primary victim or critical witness. The Board meets bi-monthly to review the system's response to children and to give guidance to the Attorney General regarding the operation and expansion of Children's Justice Centers.

APPLICANTS:

1. C. Markley Arrington
2. Trevor A. Bradford
3. David W. Brown
4. Lisa Crawford
5. Tasha M. Williams
6. Ron D. Wilkinson

INFO ONLY:

DISCUSSION:

ACTION NEEDED: X

STATE OF UTAH

OFFICE OF THE ATTORNEY GENERAL



JOHN E. SWALLOW

ATTORNEY GENERAL

KIRK TORGENSEN
Chief Deputy

BRIAN L. TARBET
General Counsel

September 4, 2013

John Baldwin
Executive Director
Utah State Bar Association
645 South 200 East
Salt Lake City, UT 84111

Re: Children's Justice Center State Advisory Board

Dear John,

The State Children's Justice Center Advisory Board (U.C.A. section 67-5b-101, et seq.) has a member who is a criminal defense attorney. Robert Steele from the United States Legal Defenders Office has been that member for the last eight years. Bob was wonderful and served as chair of the Board from 2011 to 2012. Bob's two four year terms have come to an end and the Board needs a new criminal defense attorney. U.C.A. section 67-5b-106(j) states that selection of the criminal defense attorney is the responsibility of the Utah State Bar. So I am writing to you to request that you place selection of a criminal defense attorney to serve on the State Children's Justice Center Advisory Board on the Bar Commission's agenda as soon as practicable. The Board meets every two months at noon for approximately 90 minutes, so the time commitment is very manageable. If you have questions about the position, please contact the CJC program's development coordinator, Laura Seklemian at 801-281-1238.

I hope everything is going well for you and your family.

Cordially,

Craig L. Barlow

Division Chief, Children's Justice Division

JENSEN, ADAIR, ARRINGTON & BORNEMEIER, LLC
C. Markley Arrington, Attorney
1010 North 500 East, Suite 100
North Salt Lake, UT. 84054
(801) 292-6400
FAX: 292-6414

September 4, 2013

Utah State Bar
Executive Director
John C. Baldwin
645 south 200 East
Salt Lake City, UT. 84111

RE: Letter of Interest, Children's Justice Centers, State Advisory Board,

Dear Mr. Baldwin,

I am writing this letter to express an interest in applying for and serving on the State Advisory Board for the Children's Justice Centers in Utah.

I have served for approximately 10 years now on the Advisory Board for the Davis County Children's Justice Center. I have taken every opportunity to serve actively on the committee and have attended most of the training offered at the annual Children's Justice Symposiums.

I graduated from the Oklahoma University School Of Law in May of 1998 and was admitted to the Utah Bar in September 1998. I have practiced law mainly in the areas of juvenile and adult criminal defense, parental defense, and family law.

I currently hold a contract with Davis County as a public defender which is a part-time contract for both the adult and juvenile courts. I have held a contract with Davis County since 1999.

I have found my practice to be a rewarding experience. I have had the privilege and pleasure of serving with some very outstanding people in the Children's Justice Program and hope to be considered by the Utah Bar Commission in this newly opened position.

Sincerely,



C. Markley Arrington

Christy Abad

From: Trevor Bradford [trevorb@craigswapp.com]
Sent: Wednesday, September 18, 2013 12:55 PM
To: Christy Abad
Subject: Children's Justice Center State Advisory Board
Attachments: Resume (as of Sept 2013).pdf

Dear Christy:

I am writing regarding the position on the Children's Justice Center Advisory Board. To that end, I have attached my resume to this e-mail.

I feel compelled to share with you some information about myself that is not outlined in my resume. First, I grew up in a family where children were nurtured and respected. It has been a goal of mine for some time to ensure that such a nurturing, caring atmosphere is provided to all children.

Second, while serving a mission for the Church of Jesus Christ of Latter-day Saints in Houston, Texas, I saw the devastating effects of poverty and poor family circumstances as I served in areas known as the "projects." Since that time, I have felt a strong desire to help children better their circumstances by educating parents and children alike about the opportunities available to them and the community support available to them such as the Utah County Children's Justice Center.

Finally, as a divorced dad with 4 children (I am now remarried), I know from personal experience some of the injustice children must suffer through as a result of the decisions made by the adults in their lives. I am committed to justice for children and ensuring that children do not unduly suffer for the poor decision made by the adults in their lives.

Thank you in advance for your serious consideration of my qualifications to serve on the advisory board for the Children's Justice Center. I look forward to hearing from you.

Best,

Trevor A. Bradford, Esq.
CRAIG SWAPP & ASSOCIATES
801-990-1919 (Office)
801-372-7703 (Mobile)
9980 S. 300 W., Suite 400
PO Box 709390
Sandy, Utah 84070

www.craigswapp.com

Trevor A. Bradford, Esq.

7823 S. Norfolk Pine Way

Sandy, Utah 84094

(801) 372-7703

TrevorB@craigswapp.com

PROFESSIONAL HIGHLIGHTS

- Admitted to practice in the U.S. Supreme Court (May 2013)
- Judge *Pro Tempore* as appointed by the Utah Supreme Court (2011-present)
- Presided over hundreds of small claims trials
- Admitted to practice in all state and federal courts in Utah (2005-present)
- Post law school federal judicial clerkship with the Hon. Bruce A. Markell (2004-2005)

PROFESSIONAL EXPERIENCE

TRIAL ATTORNEY AT CRAIG SWAPP & ASSOCIATES, Sandy, Utah. June 2011-present.

Advocate for clients on a variety of tort claims, including wrongful death cases, semi-truck cases, traumatic brain injury cases, etc. Settled six-figure personal injury claims. Lead counsel for clients at arbitrations and trials. Analyze liability and damages aspects of a case to advise clients. Responsible for managing a client base of approximately 100 clients/cases.

ASSOCIATE AT SMITH & GLAUSER, P.C., Sandy, Utah. June 2008-June 2011.

Member of the Litigation Group and Insurance Defense Group.

Defended clients against claims of negligence and other tort claims. Successfully prepared and won dispositive motions. Advised clients on litigation strategies. Analyzed liability and damages aspects of a case to advise insurance companies. Prepared opinion letters outlining exposure and risks to insurance companies/clients.

FOUNDING PARTNER, LAW OFFICE OF TREVOR A. BRADFORD, Sandy, Utah. 2006-June 2008.

Settled six-figure personal injury claims. Advised clients on business transactions, including business formation and liability risks/exposure. Prepared and filed organizational documents for business entities. Acted as trial counsel for clients in small business disputes. Represented clients in settlement negotiations and other forms of alternative dispute resolution.

ASSOCIATE AT JONES, WALDO, HOLBROOK & McDONOUGH, St. George, Utah. 2005.

Member of the Litigation Group.

Advised clients on complex litigation, including mass tort defense. Tried several domestic cases, including a week-long termination of parental rights case. Wrote dispositive motions. Performed legal research on various topics including negligence, remedies, and the learned intermediary doctrine.

JUDICIAL CLERKSHIP

FEDERAL JUDICIAL CLERK FOR THE HON. BRUCE A. MARKELL, U.S. BANKRUPTCY COURT,
Las Vegas, Nevada. 2004-2005.

Prepared draft legal opinions. Prepared bench memoranda. Performed legal research on various topics including secured transactions and debtor/creditor law.

EDUCATION

UNIVERSITY OF MONTANA SCHOOL OF LAW, Missoula, Montana.
Juris Doctorate, May 2004

- ▶ Recipient of award for excellence in writing on an intellectual property topic.

BRIGHAM YOUNG UNIVERSITY, Provo, Utah.
Bachelor of Arts in English and Business minor, August 1998.

- ▶ Recipient of University Scholarship.

MEMBERSHIPS AND ADMISSIONS

Member, Utah State Bar
Utah State Bar No. 10233

Admitted to practice law before all federal courts in Utah, and all state courts in Utah.

Member of the following sections of the Utah State Bar:

- ▶ Litigation
- ▶ Utah Association for Justice ("UAJ")

AREAS OF INTEREST AND PRACTICE

- ▶ Criminal Law
- ▶ Constitutional Law
- ▶ Wrongful Death Cases
- ▶ Traumatic Brain Injury Cases

DAVID W. BROWN
ATTORNEY AT LAW

BLAKE PROFESSIONAL PLAZA, SUITE F
2880 WEST 4700 SOUTH
SALT LAKE CITY, UTAH 84129
(801) 964-6200 (801) 967-7600 FAX
lwfrmdwb@hotmail.com



September 18, 2013

Christy J. Abad
Executive Secretary
Utah State Bar
Utah Law and Justice Center
645 South 200 East
Salt Lake City, Utah 84111
adminasst@utahbar.org

Re: Board Vacancy
Children's Justice Center State Advisory Board

Dear Ms. Abad:

I am submitting this letter and resume to apply for the vacancy announced by the Bar Commission to serve on the Children's Justice Center State Advisory Board.

I believe my expertise as a criminal defense attorney over the last 23 years would be perfect for this position. My experience as chairman and co-chairman of the Utah Bail Bond Recovery Licensure Board also would be helpful.

I have litigated all types of criminal cases, state and federal, felonies and misdemeanors, and have done so in almost every district or justice court in the state of Utah. I have served as a judge pro tempore for the last six years, primarily in Park City and West Valley City. I believe that experience would be beneficial for service on this board.

In various ecclesiastical positions, I have trained other leaders on issues related to abuse of children. All of these experiences would serve me well on such a Board.

If you should have any questions, please do not hesitate to contact me.

Sincerely yours,

A handwritten signature in dark ink, appearing to read 'David W. Brown', with a horizontal line underneath it.
David W. Brown

DWB:kd
Enclosure

DAVID W. BROWN
6542 West 3880 South
West Valley City, Utah 84128
Home: (801) 250-6875; Work: (801) 964-6200
Email: law.davidwbrown@gmail.com

EDUCATION

Legal: J.D., Brigham Young University, April 1990
Undergraduate: B.A., Penn State University, 1975, Journalism

WORK EXPERIENCE

Judge Pro Tempore, Third District Court and Justice Courts	9/06 to Present
Law Office of David W. Brown - Blake Professional Plaza 2880 West 4700 South, Suite F, Salt Lake City, Utah 84129 Attorney/Owner of general litigation firm, specializing in criminal cases.	12/92 to Present
J.H. Bottum & Associates - Salt Lake City, Utah Associate Attorney with litigation firm specializing in securities.	5/90 to 11/92
Gregory Hadley & Associates - Provo, Utah Law clerk with general practice firm.	1989-1990
Thomson, Rhodes & Cowie - Pittsburgh, Pennsylvania Law clerk for national litigation firm.	4/89 to 8/89
Harding & Associates - American Fork, Utah Law clerk for personal injury, general practice firm.	11/88 to 1990
Hansen & Associates - Salt Lake City, Utah Law clerk in major, complex product liability litigation.	4/88 to 9/88
Inteldex, Inc. - State College, Pennsylvania Investigator for personal injury, workers compensation, and insurance fraud in eight-state area.	2/81 to 8/87
Centre Daily Times - State College, Pennsylvania Assistant Sports Editor. Extensive writing experience, contributing stories and leads to Associated Press, United Press International and Soccer America.	2/77 to 2/81
Somerset Daily American - Somerset, Pennsylvania Sports Editor. Supervise sports department. Design and lay out sports pages, football tabloid. Interview top coaches and players, college and professional.	6/75 to 2/77

HONORS AND ACTIVITIES

- 2013, Chairman, State of Utah Bail Bond Recovery Licensure Board
- 2013 NBI Seminar: Dirty Litigation Tactics: How to Deal with the 'Rambo' Litigator
- 2012, Co-Chairman, State of Utah Bail Bond Recovery Licensure Board
- 2012 NBI Seminar: Handling Rambo Litigators in Utah
- 2011 NBI Seminar: How to Deal with Impossible Clients, Witnesses and Counsel
- 2010 NBI Seminar: The Criminal Defense Trial from A to Z
- 2008 NBI Seminar: Criminal Justice Updates and Current Issues
- Member of UAJ, UACDL, Litigation Division of Utah State Bar and Salt Lake County Bar Association, 2000 to Present
- Area Chairman, Pennies-By-The-Inch Campaign, 2008-2011
- District Chairman, Pennies-By-The-Inch Campaign, 2003 to 2007
- Advertising Chairman, Cyprus High School Booster Club, 2005
- Organization Head, Scout Troops 811/3811, Great Salt Lake Council, Boy Scouts of America, 1995 to 2000
- Articles Editor, Utah Bar Journal, 1992 to 1995
- Editor, BYU Journal of Public Law, 1989-90
- BYU "Highest Grade" Award in Criminal Trial Practice, Fall Semester, 1989
- BYU "Highest Grade" Award in Product Liability, Winter Semester 1990
- American Inn of Court, BYU Chapter, 1989-90
- Negotiation Forum, BYU Chapter
- Vice President, Association of Trial Lawyers of America, BYU Chapter
- Recipient of Scripps-Howard Foundation, Lawrence J. Fagan Journalism Scholarship, 1974-75
- Vice President, Kappa Tau Alpha (Journalism Honor Society), 1975

PERSONAL

Born September 25, 1953, Altoona, Pennsylvania
Married, 6 children, 9 grandchildren

REFERENCES

Judge Robin W. Reese, Third District Court, 450 South State Street, Salt Lake City, UT 84114,
(801) 238-7365

Judge Robert K. Hilder, 2319 Foothill Drive, #220, Salt Lake City, UT 84109,
hilder@hildermccosh.com

Gregory Skordas, Skordas, Caston & Hyde, 341 South Main, #303, Salt Lake City, Utah 84111,
(801) 531-7444

Loren E. Weiss, Ray Quinney & Nebeker, 36 South State St., Suite 1400, Salt Lake City, Utah
84111, (801) 532-1500

Christy Abad

From: lisadcb@gmail.com on behalf of Lisa Crawford [lisac@utcpd.com]
Sent: Tuesday, October 15, 2013 12:22 AM
To: Christy Abad
Subject: Application for CJC State Advisory Board
Attachments: Lisa Crawford-Blanchard resume.docx

Christy Abad,

I am requesting consideration for the criminal defense attorney position to serve on the Children's Justice Center State Advisory Board. Thank you for your consideration.

Lisa Crawford
801-602-9836

10/15/2013

Lisa D. Crawford-Blanchard

1191 W. 550 S. Provo, UT 84601 • 801-602-9836 • lisadcb@gmail.com

Legal Experience

Attorney – Utah County Public Defenders Association; Provo, Utah – 2005 to present

- Criminal defense attorney before the Fourth District Court
- Assigned felony and misdemeanor offenses
- Participate in various court hearings, including bail, preliminary, suppression, trial, sentencing and order to show cause
- Prepare motions, oral arguments and interviews
- Negotiate resolution of cases with clients, prosecutors, law enforcement and victims

Law Clerk/Bailiff - Fourth District Court; Provo, Utah – 2004 to 2005

- Legal research for Judges Steven L. Hansen and Samuel D. McVey
- Draft rulings and opinions as directed by the judge
- Provide courtroom security

Research Assistant – J. Reuben Clark Law School; Provo, Utah – 2003

- Mentor and train law students in mediation
- Supervise mediations in small claims court

Law Clerk & Externships – 2002 to 2003

- Utah County Public Defenders Association; Provo, Utah
- Federal Public Defender, District of Utah; Salt Lake City, Utah
- Utah Attorney General's Office; Salt Lake City, Utah
- United States Attorney's Office, District of Utah; Salt Lake City, Utah
- Victim Assistance Program; Orem, Utah
- Senior Citizen Center; American Fork, Utah
- Small Claims Court; American Fork, Utah

Education & Professional Training

- Member of Utah Association of Criminal Defense Lawyers – 2005 to present
- Member of Utah State Bar – 2004 to present
- Certified Special Function Officer, Fred House Academy – 2004
- Juris Doctor – J. Reuben Clark Law School, Brigham Young University – 2003
- Domestic Mediation Certificate – 2003
- Mediation Certificate – 2002
- Bachelor of Science, Psychology and Sociology – University of Utah – 1995
- Certificate of Criminology & Corrections – University of Utah – 1995

C

J

D

M

B

- ssociate of Science, Behavioral Science – Utah Valley University – 1993

Work Experience

Probation Officer – Fourth District Juvenile Court; Provo, Utah – 1997 to 2001

- Supervise juvenile offenders placed on probation
- Conduct intake processing and preliminary interviews
- Prepare petitions and probation reports
- Attend court hearings and provide recommendations
- Liaison with allied community agencies, therapists and schools

Genesis Youth Center Counselor – Juvenile Justice Services; Draper, Utah – 1994 to 1997

- Supervise juvenile offenders within a community based program
- Implement and monitor community work projects and daily activities

Youth Counselor – Youth Services International, Inc.; Provo, Utah – 1996

- Supervise juveniles in private residential group home

Resident Unit Aide – Heritage Residential Treatment Center; Provo, Utah – 1996

- Supervise juveniles in private residential group home

Christy Abad

From: Tasha Williams [twilliams@ujda.org]
Sent: Saturday, October 05, 2013 9:34 PM
To: Christy Abad
Subject: Applicant for CJC State Advisory Board
Attachments: Resume 10.5.13.pdf

Dear Ms. Abad,

My name is Tasha Williams and I am a juvenile public defender applying for the position available on the Children's Justice Center State Advisory Board. Attached is my resume.

I currently represent indigent juveniles who appear on delinquency charges before Judge Christine Decker in the West Jordan Third District Court. For whatever reason, Judge Decker seems to receive a higher number of juveniles accused of sex offenses than most. I usually have between four and eight of these cases pending at a time. Because I have been in the same courtroom for more than two years, I have benefited from watching these kinds of cases from the time of disclosure to expungement. It is rare for juveniles to perpetrate against adults so in most of my cases both my client and the victim are usually interviewed at the CJC. It is easy to see why the work done at the CJC is an invaluable resource to me and my clients.

As a juvenile delinquency attorney, regular training on adolescent brain development and its effect on interviewing is essential to my practice. In fact, I attend yearly trainings with the National Juvenile Defender Resource Center that highlight its importance. I also strive to attend the yearly conference for NOJOS, the Utah Network of Juveniles Offending Sexually, which seeks to implement the best practice for treating juvenile sex offenders. In court proceedings I must ask both juvenile offenders and juvenile victims difficult questions about traumatic events. I am very cognizant of the distress these conversations can cause the victim and many other parties.

This experience with juvenile offenders and victims puts me in a unique position to offer valuable input on the CJC State Advisory Board. I can be contacted on my cell phone at (435) 590-1580 or by email at twilliams@ujda.org. Thank you for considering my application.

Sincerely,
Tasha M. Williams
Utah Juvenile Defender Attorneys, LLC
8 East Broadway, Suite 500
Salt Lake City, Utah, 84111
Telephone: (801) 521-5225
Fax: (801) 521-5268
twilliams@ujda.org

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10/7/2013

Tasha M. Williams

Attorney at Law

8 East Broadway, Suite 500

Salt Lake City, Utah, 84105

Cell (435) 590-1580; Email twilliams@ujda.org

HIGHER EDUCATION

May, 2008

Juris Doctor

University of Utah, S.J. Quinney College of Law

- Competitor, Regional Trial Advocacy Competition, February 2008
- Quarter Finalist, Traynor Moot Court Competition, March 2007
- President, Student Bar Association, 2007-2008

May, 2005

Bachelor of Science, summa cum laude, Political Science and Communication

Southern Utah University

CONTINUING EDUCATION

March 2013

NOJOS Case Management Conference

Utah Network on Juveniles Offending Sexually, Salt Lake City, Utah

- The Body Remembers: How the Traumatized Brain Effects Behavior
- Youth with Sexual Behavior Problems: Who are they Really?
- Online Sexual Behavior
- The Set Up: Grooming and Boundaries
- Who's a Victim? Dating and Sexual Violence
- The Influence of the Media on Healthy Sexuality
- Understanding Juvenile Sex Offender Patterns

Oct., 2012

Juvenile Defender Leadership Summit

National Juvenile Defender Center, Rio Grande, Puerto Rico

- Individualized Advocacy: Every Child's Right to a Tailored Defense
- Youth Matters: Strategies for Keeping Youth Out of the Adult System
- Breaking Down Bullying: Balancing the Duties to Protect and Defend
- Language Impairment and Comprehension of the Legal Process
- Complex Trauma: Pitfalls and Opportunities
- For Girls Only? The Implications of Gender-Responsive Programming

March, 2012

NOJOS Case Management Conference

Utah Network on Juveniles Offending Sexually, Salt Lake City, Utah

- Clinical Polygraph: Best Practices and Current Controversies
- Handling Disclosures and Other Issues That Arise In Out-of-Home Care
- Intrafamilial Abuse 101
- JSORRAT II
- Moving Towards Gender Specific Treatment
- Replacing Unhealthy Sexuality with Healthy Sexuality
- Sexting! What Do You Mean Its Porn?

- Oct., 2011 **Juvenile Defender Leadership Summit**
National Juvenile Defender Center, Seattle, Washington
- Children Charged with Sex Offenses: Public Education & Public Policy
 - Helping the Court to Understand Normative Sexual Behavior
 - Spotlight on *J.D.B. v. North Carolina* – Inside Perspective
 - The Prevalence and Impact of Language Impairment in Juvenile Court
- Oct., 2010 **Juvenile Defender Leadership Summit**
National Juvenile Defender Center, Washington D.C.
- Zealously Defending Against Juvenile Sex Offense Charges
 - The Birds and the Bees: Normative v. Deviant Sexual Behaviors in Teens
 - Communicating with Youth: Critical Nature of Interviews and Colloquies
 - Juvenile Jurisprudence in the Wake of *Roper* and *Graham*
 - Suppression Motions: State Constitutional Arguments

EXPERIENCE

- Sept. 2010-
Present **Associate Attorney, Utah Juvenile Defender Attorneys, Salt Lake City, Utah**
Represent indigent juveniles accused of all felony and misdemeanor delinquent acts from detention hearing through adjudication. Negotiate plea deals, draft and argue motions to suppress evidence, conduct bench trials and restitution hearings. Zealously advocate for juveniles and their mitigating circumstances during disposition. Attend yearly 3-day trainings via the National Juvenile Defender Center and several trainings with the Utah NOJOS network.
- Oct. 2007 –
August 2010 **Associate Attorney and Law Clerk, Skordas, Caston & Hyde, Salt Lake City, Utah**
Negotiated plea deals, oral advocacy at pre-trial proceedings and sentencing hearings, legal research, draft and argue pre-trial motions, including but not limited to motions to suppress, motions to quash, and sentencing memorandums.
- Aug. 2007 –
May 2008 **Criminal Defense Clinical Participant, University of Utah College of Law**
Represented defendants accused of misdemeanor crimes in Salt Lake City under the third-year practice rule in both pre-trial and trial settings; participated in several bench and jury trials.
- Oct. 2006 –
Oct. 2007 **Law Clerk, Utah Attorney General's Office, Litigation Division**
Researched and analyzed constitutional and employment issues; worked to limit damages in *Roska v. Sneddon* for the state's violation of the Roska's due process rights.
- Fall 2006 **Law Clerk, Third District Court of Utah, Honorable Judith Atherton**
Researched and observed criminal proceedings, including the competency hearing of Brian David Mitchell, Elizabeth Smart's alleged kidnapper.

Ron D. Wilkinson, Attorney at Law, Mediator, Private Guardian ad Litem, Special Master
The Heritage Building - 815 East 800 South, Orem, Utah 84097 - (801)225-6040

Current as of October 2013

EDUCATION:

PhD. TRAINING; Clinical Psychology, BYU	August 2000-August 2006
JURIS DOCTOR; J. REUBEN CLARK SCHOOL OF LAW, BYU (graduated top 1/3)	April 1989
Editor; <u>Education & Legal Perspectives</u> , sponsored by JRC Law School & BYU College of Education	1988-1989
Vice-president; J. Reuben Clark Negotiation Forum, Honors Awarded in annual competitions	1988-1989
Teaching Assistant; Interviewing and Counseling, Constance Lundberg, J.D.	1988-1989
Teaching Assistant; Communications Law, taught by Dr. Dallas Burnett, Phd. Communications	1988-1989
Senior Editor; J. Reuben Clark Law School Board of Advocates; honors awarded each year	1987-1989
BACHELOR OF ARTS; Cum Laude, Department of Communications, BYU	August 1986
President; Brigham Young University's Nationally Ranked Debate Team	1984-1986
Dean's Scholar; Brigham Young University, Academic Achievement	1983-1984
Talent Scholarship; Brigham Young University, Debate & Argumentation	1983-1986
Nationally Ranked; Collegiate Debater and Speaker (received over one hundred national awards)	1983-1986

EXPERIENCE:

OWNER; <i>Heritage Law Offices, Orem, Utah</i> Heritage Law Offices were established in June 2000 to provide high quality legal services throughout the State of Utah.	June 2000-present
MEDIATOR; Completed Certified Training (basic and advanced) for court ordered mediation	February 2000-present
FACULTY (adjunct); Brigham Young University, Department of Theater Media Arts, Public Speaking, Advanced Public Speaking	Winter 1996-present
FACULTY (adjunct); Brigham Young University, Department of Psychology, Courses taught: Abnormal Psychology, Adult Development, Life Span Development, Child Development	Summer 2001-Winter 2004
UTAH SUPREME COURT ADVISORY BOARD MEMBER; Sub-committee, Rules of Juvenile Procedure. Advise the Utah Judiciary. Assist in the formulation of amendments and new regulations to existing rules.	Winter 1998-July 2000
MANAGING ATTORNEY; <i>Office of the Guardian ad Litem; Fourth District</i> The Office of Guardian ad Litem was created in 1994 under the supervision of the Utah Judicial Council. Selected as the first managing attorney. I was responsible for hiring, training, and supervising attorneys and staff, implementing policy and procedure for handling abuse and neglect cases in both juvenile and district court cases. I assisted in the coordination of a volunteer program (CASA) and multiple pro bono attorneys. I carried a full caseload of approximately 200 clients, all children.	July 1994-June 2000
GUARDIAN AD LITEM ATTORNEY; <i>Office of the Guardian ad Litem; Fourth District</i> Served as a guardian ad litem interviewing children and families, consulting with mental health professionals, case managers, volunteers, and others. Trial and appellate work, assisting with new legislation and projects affecting children. Provided training to case managers, volunteers, foster parents, and mental health providers. Extensive experience in drafting court orders and legal memoranda.	November 1992-April 2001
CHAIRMAN; Children's Justice Center Advisory Board, Provo, Utah Assist in the coordination of interviewing child victim's of abuse and neglect in a home-like setting, coordinating multi-disciplinary staffings, and coordinating government and community efforts on behalf of children	Winter 1996-July 2000
FACULTY (adjunct); Brigham Young University, Graduate School of Social Work Course taught: Social Work and the Law	Winter 1995-Winter 1998
TASK FORCE; Implementation of House Bill 265 (Child Welfare Reform Bill)	April 1994-December 1994
AD HOC COMMITTEE; Formulation of the State of Utah Guardian ad Litem Program	March 1993 - December 1999
ATTORNEY AT LAW; Private Practice and Corporate Counsel; Admitted to Practice: United States District Court, District of Utah, Utah Supreme Court,	October 1989-July 1994 April 2001-present October 1989 October 1989
FACULTY (adjunct); Brigham Young University, Department of Communication, Course taught: Communications 150	Winter 1986-1995

HONORS:

UTAH COUNTY DOMESTIC VIOLENCE COALITION, PURPLE RIBBON AWARD	2010
CHILD ADVOCATE AWARD; Presented by the Division of Child and Family Services and Utah Foster Parents	1996
<u>THE WADSWORTH PUBLISHING COMPANY'S CHALLENGE AWARD;</u> Presented to university faculty who excel in contributing to effective public speaking	Fall 1986-Winter 1989
BEST ORALIST; Jerome Prince National Moot Court Competition, sponsored by Brooklyn Law School Honor Society	1989
HONORS IN NEGOTIATIONS Regional Alternate, 1987/Regional Representative, 1988/Third place in Region (National alternate)	1987-1988
ARTICLES ACCEPTED FOR PUBLICATION; ‘The Future of a Moment of Silence in Public Schools, Will the Proponents Have Their Prayers Answered?’ <i>Education and Legal Perspectives</i> , 1988, Brigham Young University, Provo, Utah	1988-1989
ARTICLES ACCEPTED FOR PUBLICATION; ‘The First Amendment and the Teaching of Evolution in Public Schools.’ <i>Education and Legal Perspectives</i> , 1989, Brigham Young University, Provo, Utah	1988-1989

ORGANIZATIONAL MEMBERSHIP:

ALUMNI BOARD; J Reuben Clark School of Law	January 2000-2003
ADVISORY BOARD; Children’s Justice Center, Summit/Wasatch County	Spring 1999-June 2000
LOCAL INTERAGENCY COUNCIL; Board Member	Winter 1998-April 2001
UTAH FOSTER PARENT ASSOCIATION; Member	Summer 1996-March 2001
ADVISORY BOARD; Children’s Justice Center, Statewide Advisory Board	Winter 1996-July 2000
ADVISORY BOARD; Children’s Justice Center, Utah County; Member	Winter 1993-1997
ADVISORY BOARD; Children’s Justice Center, Utah County; Chair	Winter 1997-July 2000
REGION III JUVENILE DETENTION ADVISORY BOARD;	December 1993-June 2000
NATIONAL ASSOCIATION OF COURT APPOINTED SPECIAL ADVOCATES	1993-April 2001
UTAH STATE BAR ASSOCIATION; Member	October 1989-present
J. REUBEN CLARK LAW SOCIETY; Member	April 1989-present
AMERICAN TRIAL LAWYERS ASSOCIATION;	April 1989-present

PROFESSIONAL PRESENTATIONS (ending Fall 2013):

‘Types of Custody Arrangements,’ J. Reuben Clark Law School, Annual Domestic Relations Conference	January 2007, 2010-2012
‘Becoming a Child Advocate,’ Court Appointed Special Advocate - Certification Training	March 2001
‘So you want to be a Lawyer?,’ BYU, Pre-Law Society	March 2001
‘Becoming a Child Advocate,’ Court Appointed Special Advocate - Certification Training	Fall 2000
‘Child Welfare Reform,’ J. Reuben Clark Law School	February 2000
‘Proper Documentation for Peer Parenting,’ Division of Child and Family Services, Peer Parent Training.	February 2000
‘Becoming a Child Advocate,’ Court Appointed Special Advocate - Certification Training	November 1999
‘The Use of Expert Testimony in Court,’ Pro Bono Guardian ad Litem Training	June 1999
‘Child Advocacy; The Office of Guardian ad Litem,’ Annual Family Law Conference	May 1999
‘An Overview of the Responsibilities of a Guardian ad Litem,’ Pro Bono Guardian ad Litem Training	May 1999
‘The Creation of a Family Court,’ Utah County Bar Association	May 1999
‘Advocating for Children,’ Victim Advocate Training	February 1999
‘The Process of Obtaining a Protective Order,’ Domestic Violence Coalition, D.C.F.S.	January 1999
‘The Challenges of the Adversarial Process,’ Brigham Young University Pre-Law Society	October 1998
‘The Ethics of Client Representation,’ J. Reuben Clark Law School, Ethics Seminar	September 1998

'Creative Approaches to High-Conflict Divorces,' Pro Bono Guardian ad Litem Training	June 1998
'Representing the Child,' Pro Bono Guardian ad Litem Training	June 1998
'Testifying as an Expert in Court,' Workshop for Clinical Professionals,	April 1998
'The Opportunities in Government Service,' Brigham Young University, Pre-Law Career Fair	February 1998
'Testifying as an Expert in Court,' Workshop for Clinical Professionals, D.C.F.S. Core Training	October 1997
'The Advocacy of Children,' Employee Conference, Administrative Office of the Courts	September 1997
'An Overview of the Duties of an Guardian ad Litem,' Pro Bono Guardian ad Litem Training	June 1997
'The Dynamics of Divorce,' Pro Bono Guardian ad Litem Training	June 1997
'Dealing with the Plight of a Child in Custody and Visitation Disputes,' Pro Bono Guardian ad Litem Training	May 1997
'The Use of Child Testimony in Court,' Children's Justice Symposium	May 1997
'Ethics in Government Service,' J. Reuben Clark Law School, Ethics Seminar	February 1997
'The Who, What, How, and Why of Guardians ad Litem,' Utah County Child Abuse Council	January 1997
'An Overview of the Office of the Guardian ad Litem,' Pro Bono Guardian ad Litem Training	May 1996
'Working with Mental Health Professionals,' Pro Bono Guardian ad Litem Training	May 1996
'The Office of Guardian ad Litem,' Employee Conference, Administrative Office of the Courts	September 1996
'Child Welfare Reform Act,' 'The Duties of a Guardian ad Litem,' and 'Child Advocacy,'	1994-1996
These presentations were given on numerous occasions to court clerks, case managers, foster parent association members, mental health professionals and others.	

CONTINUING EDUCATION TRAINING (current Fall 2013):

"Role of the Private Guardian Ad Litem and Appointment Process;" (PGAL Certification Awarded)	August 2013
"Domestic Violence and Abuse Involving Children;"	August 2013
"Child Development in Relation to Separation From Parents;"	August 2013
"Best Interest Evidence and Criteria;"	August 2013
"Learning From the Experts: Annual Domestic Relations Conference;" J. Reuben Clark Law School	January 2012
"Utah Child Advocacy Training;" National Institute for Trial Advocacy	August 2011
"Annual Parental Defense Conference;" Parental Defense Alliance of Utah	2008-2013
"What You Should Know When Appearing Before the Fourth District Commissioner;"	February 2008
BYU Education Week Continuing Legal Education Program	2006-2007
"Role of the GAL, Court Process, and Case Management;"	February 2006
"Ethics, Honesty, and Truth Telling;"	August 2005
"Negotiation and Conflict Resolution for Lawyers and Professionals;"	August 2005
"The 8 Greatest Estate Planning Techniques;"	July 2005
"State and Local Government Conference;"	March 2005
"Practical Pointers on Utah Asset- Protection Trusts;"	September 2004
"Great Western Tax & Estate Planning Conference;"	October 2003
"Guardian Ad Litem Training;"	April 2003
"Document, Discovery, & Management: The Latest Software to Index, Sort, and Retrieve Documents;"	November 2001
"Phillip Stahl, PhD. - Interventions in Divorce;" Administrative Office of the Courts (GAL)	September 2000
"Divorce Training;"	May 2000
"Child Welfare Training Conference;"	May 2000
Advanced Mediation Certification; - Schooley School of Mediation, J.R.Clark Law School (Certification Awarded)	Spring 2000
Mediation Certification; - Schooley School of Mediation, J.R.Clark Law School (Certification Awarded)	February 2000
"Judith Wallerstein, PhD. - Children of Divorce;" University of Utah	November 1999
"Sand Tray Therapy, An Overview of Experiential Therapy;" Family Support and Treatment Center	October 1999
"Using Psychological Evaluations in Court;" Administrative Office of the Courts (GAL)	September 1999
"Annual Family Law Conference;" Utah State Bar	May 1999
"The Use of a Special Master in High Conflict Divorces;" Pro Bono Guardian ad Litem Training	May 1999
"The Effects of Abuse and Neglect on Children;" Administrative Office of the Courts (GAL)	April 1999
"The Language of Children;" Attorney General Child Protection Division, Administrative Office of the Courts (GAL)	April 1999
"Child Protection Issues;" "Child Development;" Administrative Office of the Courts (GAL)	October 1998
"Recognizing the Physical Signs of Child Abuse;" Administrative Office of the Courts (GAL)	September 1998
"Recognizing the Emotional Effects of Child Abuse;" Administrative Office of the Courts (GAL)	June 1998
"Working with Mental Health Professionals;" Administrative Office of the Courts (GAL)	April 1998
"Guardianship Law for the General Practitioner;" Administrative Office of the Courts	April 1998
"Children Justice Symposium;" Attorney General Child Protection Division	May 1998
"Advocacy of Children;" Administrative Office of the Courts (GAL)	November 1997
"Children Justice Symposium;" Attorney General Child Protection Division	May 1997
"Child Welfare Law;" Administrative Office of the Courts (GAL)	April 1997
"Assessing Clinical Evaluations;" Administrative Office of the Courts (GAL)	September 1996
"Interviewing Children;" Kevin Gully, Forensic Clinical Psychologist - Administrative Office of the Courts (GAL)	Spring 1996
"The Physical and Emotional Effects of Child Abuse;" Administrative Office of the Courts (GAL)	March 1996
"Child Development;" Administrative Office of the Courts (GAL)	January 1995
"Guardian ad Litem Attorney Training;" Administrative Office of the Courts (GAL)	March 1995
"Child Welfare;" Administrative Office of the Courts (GAL)	June 1995
"Guardian ad Litem Training;" Administrative Office of the Courts (GAL)	October 1995
"The Language of Children;" Administrative Office of the Courts (GAL)	December 1995

"Indian Child Welfare Act;" Judge Thome	June 1994
"Advocacy for Children and Families;" Administrative Office of the Courts (GAL)	November 1993
"Guardian ad Litem Training for Juvenile Court;" Administrative Office of the Courts (GAL)	September 1993
"Child Development - Guardian ad Litem Training for Juvenile Court;" Administrative Office of the Courts (GAL)	June 1993
"Child Abuse and Neglect - Guardian ad Litem Training;" Administrative Office of the Courts (GAL)	April 1993
"Guardian ad Litem Training for Juvenile Court;" Administrative Office of the Courts (GAL)	December 1992
"American Bar Association, Ethical Dilemma Series;" Utah State Bar	February 1992
"Marketing for Small and Medium-Size Firms;" Utah State Bar	February 1992
"Estate Planning;" Utah State Bar	February 1992
"Probate Luncheon;" Utah State Bar	1992

PERSONAL:

My wife and I are the parents of eleven children. I enjoy skiing, racquetball, gardening, reading, and spending time with family.

References: Available upon request

Tab 3

UTAH STATE BAR
BOARD OF BAR COMMISSIONERS
MINUTES

OCTOBER 25, 2013

J. REUBEN CLARK LAW SCHOOL
PROVO, UTAH

In Attendance: President Curtis M Jensen and Commissioners: Kenyon Dove, Hon. Evelyn Furse, James D. Gilson, Mary Kay Griffin, Michael Leavitt, John Lund, Janise Macanas, Herm Olsen, Rob Rice, Tom Seiler, and Angelina Tsu.

Ex-Officio Members: Nate Alder, Danielle Davis, Heather Farnsworth, Lori Nelson, Jesse Nix, James Rasband, and Gabe White. Executive Director John C. Baldwin; Assistant Executive Director Richard Dibblee, and General Counsel Katherine A. Fox.

Not in Attendance: Commissioners: Stephen Burt, H. Dickson Burton, Susanne Gustin. Ex-Officio Members: Robert Adler, Margaret Plane, and Lawrence Stevens. Supreme Court Liaison Diane Abegglen.

Also in Attendance: Sean Toomey, Utah State Bar Communications Director

Minutes:

1. President's Report:

NEW: Curtis thanked Dean Rasband for his hospitality in hosting the meeting. Dean Rasband in turn encouraged the Commissioners' attendance at the student reception after lunch. Curtis also mentioned the passing of Judge Anthony Quinn and asked John to send flowers as well as look for an opportunity to dedicate a program or event to his memory.

1.1 Leadership Conference Report (Tab 1)

Curtis asked those in attendance to review the materials behind Tab 1 in the packet. He described generally the conference. Eve Furse commented that it was a good format for productive discussion purposes and she enjoyed it. Rob Rice also commented that the format encouraged discussion which was different than in the past events. He said that those attending observed that the wide availability of online legal services is a concern because not only does it encroach on business, but it is problematic and often requires lawyers to correct those problems. Kenyon Dove interjected that we really need to focus on what is irreplaceable in a

“real” lawyer’s service. He also said that members at the conference mentioned that they need a “benefit” to attend our conventions other than CLE credit. Herm Olsen then added that the new format was superb. He heard attendees say that reducing the number of our current 3 conventions would probably increase attendance at the others. He also suggested that the Commission and law schools get together to identify areas of practice that are diminishing as a result of the internet

Jesse Nix said that the conference was fantastic and wondered if it were possible to schedule this opportunity twice a year. Jim Gilson opined that the format was a winner since it was interactive. He wants to follow up on some of the ideas that were expressed and do this type of thing at different events. What we ought to be doing as a Bar is being relevant by emphasizing the role of lawyers in giving counsel/advice and not so much dispensing legal information. John Baldwin observed that the average status of attendees at his table was 4 years out. That group typically takes changes in stride and are less “reactionary” than older lawyers. Mary Kay Griffin said that the attendees at her table were very interested in the Bar providing resources relating to how to manage a law practice.

Curtis asked Commissioners to summarize their discussions and provide that feedback to him.

1.2 Pro Bono Celebration Report

John Baldwin provided some examples of the types of events that the pro bono folks held for this occasion.

1.3 Fall Forum November 14-15

The Fall Forum will be held on Thursday night and the following Friday all day on November 14th-15th. It is the largest convention we do. Janise Macanas will be sworn-in as a new Commissioner during the event. John Lund wondered if we could do an electronic board for attendees to share rides and plan gatherings. Lori suggested that we could do a registration listserv to accomplish this. Eve asked if there could be an opportunity for some attendees to opt out for security or privacy reasons. Janise also inquired if we could do a “meet the Bar Commission” reception outside of the CLE events so that lawyers who can’t afford or don’t otherwise plan on attending could have a chance to interact with leadership.

1.4 Commission Priorities Review

Curtis asked Commissioners to review priorities #1-5 in the packet. We are still in the process of gathering information and want to meet with the court on the future of legal practice. John Baldwin said that in light of a

fair and impartial judiciary priority, a district court candidate was recently rejected by the Utah Senate. The court had initially asked the Bar for its involvement in this development but later withdrew that request. Discussion took place on the Utah Legislature vetting judicial candidates. Perhaps we need to better educate governmental offices and contact key individuals and offer our resources. It was also suggested that we invite the members of the Senate Judiciary Committee to the Annual Lawyer Legislative Breakfast.

1.5 Underemployed Lawyers Issues

Curtis said that he had a recent sobering experience when a new lawyer at the swearing-in ceremony reported to him that he would be returning to the farm to work since he could not find a job in the legal profession. Curtis then opined that we need to try harder to find opportunities for these new lawyers and encouraged Commissioners to do just that. Janise Macanas interjected that along those lines, some new lawyers simply can't afford to attend the Fall Forum. She asked Commissioners to think about creating an opportunity to meet and greet before the conference and without charge. Nate added that a non-profit law firm is engaging in community-based legal services. They are developing a niche for low income services and do a lot of divorces and criminal defense. John Lund observed that we have a demand problem in light of an over-supply of lawyers. Curtis closed the discussion by asking Commissioners to email him and John Baldwin as new legal opportunities arise.

1.6 Video Recording Licensure Issues

This issue came up a few years ago but has been resurrected. Tom Seiler reported that Rule 30 (b) (2) governing video recording for depositions done without a court reporter doesn't provide how you obtain a transcript. Court reporters are very concerned about this issue; they are required to be certified, undergo periodic training and education, but non-court reporters do not operate under these requirements. AV Reporters is a relatively new player in the market and are not required to adhere to these constraints. They make a video available at the end of the deposition which is nice but the downside is that there is no capability of these businesses to produce a quality transcript. The recordings are often poor quality with gaps and unintelligible comments. Witnesses cannot get a free transcripts copy to review for accuracy, either. Court reporters may approach legislators for a rule change.

Danielle Davis added that these videos are often sent out of the country for transcription at a cheaper cost but the quality is not good. Rob Rice said that the solution is to modify the rule. Eve Furse said that Jonathan Hafen is the chair of the appropriate Advisory Committee on the Rules of Civil

Procedure. Kenyon offered that it is nice to have market pressures to turn out transcripts faster from the court reporters, however. John Lund said that there is no way to obtain a transcript unless a lawyer or witness travels to AV offices in Spanish Fork and unless one pays a hefty fee in advance.

2. Action Items

2.1 Select Public Education Message: Sean Toomey

Sean Toomey, the Bar's Communications Director, distributed a handout (Media Coverage September 20 – October 21, 2013) and conducted a power-point presentation. He broke down the ensuing discussion down to several concepts: (1) Is this a good concept? and (2) the Mission Statement series. Several Commissioners asked if there was a way to track "results" of the different billboards Rob Rice suggested in the "hire a lawyer series" if we could insert a unique link to more information. The use of phrases was examined and eventually, Sean asked if he could get a budget in order to fine tune the billboard concepts. Curtis told Sean to proceed in accordance with the discussion (a \$45,000, \$55,000 and a \$65,000 budget with the inclusion of Modest Means promotion) and bring back the developments to the next Executive Committee meeting.

2.2 Select "Heart and Hands" Award Recipient (Tab 2)

Three individuals were nominated by our members for this award: Jencie L. Anderson, Sarah Spencer and Erin M. Stone. Each candidate was discussed in detail. After much discussion, **Eve Furse moved to designate Erin Stone for the Heart and Hands Award. Kenyon Dove seconded the motion which passed unopposed.**

2.3 Approve 2012-2013 Audit: Mary Kay Griffin (Tab 3)

Mary Kay reviewed the 2012-2013 Bar audit. We received a "clean opinion" and the audit went very well this year. Mary Kay proceeded to point out the audit's highlights and responded to questions, including information about the Lehman Brothers investment (we have received \$72,750 so far from our \$300,000 investment). **After close of the discussion, John Lund made a motion to accept the audit. Herm Olsen seconded the motion which passed with none opposed.**

3. Discussion Items

3.1 Pro Bono Commission Issues: Rob Rice

Rob reported that the Pro Bono Commission's goal for next year is to have "every lawyer check yes" on the annual licensing form. They are also

working on enlarging the working sphere for inactive lawyers to engage in pro bono activities.

3.2 Modest Means Program Issues: John Lund

John Lund reported that the Modest Means Program already has a dedicated Listserv in response to earlier suggestions. He observed that there has been 20,754 domestic law case filings in Utah District Courts in 2013 so far and that 20,657 of those have been resolved albeit fewer than 50% of these cases have had a lawyer involved. Modest Means is experiencing several calls a day in the last six months. They have made 264 referrals and 155 of those referrals have been in family law. John continued to report that while our program is good, and better than some bar associations have in place, it's significantly under-utilized. Of new lawyers who have just been admitted, 160 signed up in the program. We need to reach another level and need to convince potential clients that they need "real" lawyers. Further discussion ensued. There has been an uptick in judges' referrals, but we continue to have low participation in the Uintah Basin and Carbon County areas.

3.3 Transition from the Practice of Law Issues

Curtis observed that there is a great need to help facilitate retiring lawyers in transitioning from full time legal practice. Lori echoed Curtis' thoughts and said that there was discussion at the break out session at the Leadership Conference on this topic.

4. Information Items

4.1 Database Review Status: John Baldwin

John Baldwin reported that Bar Alliance anticipates cutting our Bar database services off in May 2014. They still have not indicated that we have a viable option to purchase our current database. The committee reviewing this issue will have a recommendation at December's Commission meeting when Judge David Nuffer is scheduled to appear to discuss this issue.

4.2 Beneplace Group Benefits Report: John Baldwin (Tab 4)

We now have a fully executed Beneplace Group Benefits contract in place. Stay tuned for further developments but we plan on having access around the time of the Fall Forum.

4.3 Judicial Council Report: John Lund

John reported that the Judicial Council is debating whether to attend Snow Mass for their July monthly meeting. As most Commissioners already know, John Pearce was designated to the Utah Court of Appeals vacancy. There continues to be problems finding *guardian ad litem*s to represent juveniles in court proceedings. We need to do more education of lawyers regarding the role of judges so that judicial surveys more accurately reflect judges' performance. E-filing in criminal matters becomes mandatory in March of 2014.

4.4 Lawyer Advertising Rule Proposal Update: Katherine Fox

Katherine Fox said that on November 18th, she and Rob Jeffs will be attending the Court's Advisory Committee meeting on the Rules of Professional Conduct. That committee will be discussing the proposed lawyer advertising rules. Sometime after, the court will expect the Bar's summary and analysis of the public comments submitted on the proposed rules, including the committee's written response. This process seems to be taking longer than usual in light of the fact that the petition was filed in February.

5. Executive Session

HANDOUTS DISTRIBUTED AT MEETING:

1. Media Coverage September 20 – October 21, 2013

ADJOURNED: Noon

CONSENT AGENDA: None

November 12, 2013

Board of Bar Commissioners
Attention: Curtis M. Jensen, Bar President
Utah State Bar
645 South 200 East, Suite 310
Salt Lake City, Utah 84111-3834

Re: ***Fund for Client Protection
Meeting of November 1, 2013***

Dear President Jensen:

The following is a report of the meeting of the Fund for Client Protection a/k/a Client Security Fund which was held November 1, 2013 at the Law and Justice Center. The members of the Committee that were present are Committee Chair David Hamilton, Linda Barclay Mount, Audrey Hollar, Kathleen Jeffery, Miles Jensen, Mickell Jimenez, Pamela Urry and Brent Ward. Also present were Barbara Townsend from the Office of Professional Conduct and Staff Liaison Christine Critchley. The Committee considered various claims and makes the following factual analysis and recommendations:

A.	Claimant:	Rebecca Hedden
	Involved Attorney:	Jeremy M. Rogers
	Disciplinary Status:	Disbarred

FACTS: Attorney was hired to represent Claimant for a personal injury claim and settled the claims (direct and UIM) without permission or advice of the Claimant. Two checks, one for \$25,000 from the tortfeasor's carrier (Geico) and one for \$35,000 from Claimant's carrier (Farmers) were forged by Attorney. All proceeds, except a modest payment of less than \$200 to a medical provider, were kept by Attorney and lost by gambling according to Attorney.

Attorney confessed the acts to Claimant and began repayment which ultimately totaled \$14,230. The net loss to Claimant was \$22,438 after considering contracted attorney fees.

During the course of the partial repayment plan, Claimant had a second accident and Attorney indicated he would represent Claimant. Ultimately, Attorney allowed the statute of limitations to lapse.

RECOMMENDATION: The Committee recommends Claimant receive \$20,000.

B.	Claimant:	Salah Awad
	Involved Attorney:	Jeremy Rogers
	Disciplinary Status:	Disbarred

FACTS: Claimant hired Attorney to represent him in a personal injury matter. The case was settled by Attorney with no notice or consent by Claimant. Attorney forged Claimant's

signature on the \$4,000 settlement check and retained all the proceeds. Claimant's net loss was \$2,666.80.

RECOMMENDATION: The Committee recommends Claimant receive \$2,666.80.

C. **Claimant:** **R. Roger Hillman**
 Involved Attorney: **Jeremy Rogers**
 Disciplinary Status: **Disbarred**

FACTS: Claimant is a public defender in Las Vegas and hired Attorney to pursue a loan rescission/modification action. A \$6,500 retainer was paid. The promised lawsuit was never filed and virtually no work was performed. The involved property was ultimately lost.

RECOMMENDATION: The Committee recommends Claimant receive \$6,500.

D. **Claimant:** **Robert Pugh**
 Involved Attorney: **Rex Bray**
 Disciplinary Status: **Public Reprimand**

FACTS: Claimant's solely held entity hired Attorney to defend against lawsuits seeking damages regarding lien claims. Attorney failed to return calls and attend hearings despite being paid \$2,000. Claimant did not pursue collection action against Attorney who remained in active practice.

RECOMMENDATION: The Committee recommends the claim be denied under Client Security Fund Rule 14-910(d)(7) for failure to exhaust recovery methods against Attorney.

E. **Claimant:** **Shemonika Graham**
 Involved Attorney: **Jerry D. Reynolds**
 Disciplinary Status: **Suspension**

FACTS: Claimant paid \$1,715 for legal services involving a consumer protection matter. Attorney generated a billing statement with no detail for work done other than "preparation" No meaningful work was done on behalf of Claimant who ultimately received some benefit as a result of action by the Illinois Attorney General.

Attorney appeared by phone. He no longer practices law and lives in Pennsylvania. The Committee concludes this to be an unearned fee.

RECOMMENDATION: The Committee recommends Claimant receive \$1,715.

F. **Claimant:** **Lani M. Herrera**
 Involved Attorney: **Bruce L. Nelson**
 Disciplinary Status: **Suspension**

FACTS: Attorney accepted \$1,500 to represent Claimant in a divorce action. Substantial work was performed by Attorney who generated a billing statement for work totaling \$2,487. Claimant was dissatisfied with Attorney's work and the billing. Attorney appeared and indicated his billing statement was accurate.

RECOMMENDATION: The Committee recommends the claim be denied as a fee dispute and negligence issues, not dishonest conduct.

G.	Claimant:	Joseph Mendillo
	Involved Attorney:	Bruce L. Nelson
	Disciplinary Status:	Suspension

FACTS: Claimant hired Attorney on several matters involving his construction business and paid Attorney \$2,250. Two cases were successfully resolved. A third matter resulted in a summary judgment against Claimant for more than \$30,000. Attorney failed to respond to the Summary Judgment Motion. Claimant found out about the judgment from DOPL and ultimately filed bankruptcy.

Attorney appeared and indicated he had failed to withdraw and acknowledged his failure to respond to the Summary Judgment Motion. He further indicated the fees paid were exhausted on the other cases prior to the case wherein the judgment was obtained.

RECOMMENDATION: The Committee recommends the claim be denied as a fee dispute and negligence issues, not dishonest conduct.

H.	Claimant:	Jose Russell Castillo
	Involved Attorney:	Daniel V. Irvin
	Disciplinary Status:	Suspension

FACTS: Attorney was hired to obtain expungements to aid immigration issues. A \$4,000 retainer fee was paid to David Mendoza, Attorney's office manager. The Committee has encountered Mr. Mendoza several times in the past working for different lawyers and directly receiving fees. Attorney did not obtain any expungements and explained during his appearance that he worked on 402.b reductions, although none were obtained, and defended Claimant on a suspended license case in Murray Justice Court. The Committee concluded there was a partially earned fee.

RECOMMENDATION: The Committee recommends Claimant receive \$3,000.

I.	Claimant:	Lucas Visser
	Involved Attorney:	D. Scott Berrett
	Disciplinary Status:	Disbarred

FACTS: Claimant hired Attorney and paid \$750 for representation on a criminal case. After two court appearances and some preliminary work, Attorney failed to advise Claimant of a hearing date and a warrant was issued. A second case was brought against Claimant and

November 12, 2013

Page 4

Attorney agreed to represent Claimant for free. A warrant was issued on the second case against Claimant for another failure to appear, ostensibly because Attorney failed to advise of a court date.

RECOMMENDATION: The Committee recommends Claimant receive \$500.

J.	Claimants:	Scott Pedersen / Crystal Springs Clinic Inc.
	Involved Attorney:	David E. Hardy
	Disciplinary Status:	Disability

FACTS: This is a follow-up to a claim originally heard at the June 14, 2013 hearings. Crystal Springs Clinic Inc. paid Attorney an amount which could only be proven to be \$6,000 to pursue claims against Mountain View Hospital and related litigation. Attorney failed to pursue the suit for months. Ultimately, Claimant obtained Attorney's signature on a draft Complaint and filed it in Fourth District. No service was ever accomplished and the case was dismissed with prejudice.

Claimants were given additional time and opportunity to provide proof of the sum paid Attorney; however, only the \$6,000 could be proven. This represents an unearned fee.

RECOMMENDATION: The Committee recommends Claimants receive \$6,000, payable jointly to Scott Pedersen and Chrystal Springs Clinic, Inc.

The Committee has made recommendations that \$40,381.80 be paid out as compensation for the above-referenced claims. With these payments, the funds balance would be approximately \$ 254,615. Please contact me with any comments or questions.

Sincerely,

FUND FOR CLIENT PROTECTION

/s/ David R. Hamilton

David R. Hamilton
Committee Chair

DRH/erc

cc: Committee Members in Attendance

current BA 294,997
40,382)
254,615

CLE Department Co-sponsorship, Revenue Sharing Criteria and Use of E-Mail Addresses

Sections and Committees

1. The CLE Department may co-sponsor educational events with Bar Sections and Committees and share revenue on a 50/50 basis after the payment of all expenses. If a section or committee is using the event as a fund-raiser for a legally-oriented non-profit organization, the event must be approved by the CLE Department and proceeds may be split by agreement.

Outside Providers

1. The CLE Department may co-sponsor educational events with outside providers if:
 - a. the seminar meets a need that is not being met by the CLE Department;
 - b. the co-sponsor is a reputable entity or individual; and
 - c. the co-sponsor is qualified to present appropriate information in a professional manner or will bring qualified speaker(s) to present the subject matter.
2. Revenue will be shared on a 50/50 basis after the payment of all expenses.
3. If the co-sponsor is a legally-oriented non-profit organization who is using the event as a fund-raiser, the co-sponsor will receive 100% of the proceeds after the payment of all expenses.
4. Advertising events co-sponsored with outside providers include:
 - a. Advertising in the Bar Journal on the Bar CLE calendar;
 - b. Listing the seminar on the Bar CLE online calendar;
 - c. Advertising via the Bar e-mail system;
 - d. Administrative assistance in all aspects to bring the event to fruition and closing and paying expenses on the seminar.
5. Events not co-sponsored by the Bar may be listed on the Bar CLE on-line calendar. Outside providers who are not co-sponsoring with the Bar may otherwise purchase advertising in the Bar Journal. Events not co-sponsored by the Bar will not be advertised via the Bar e-mail system according to the Bar's policy on privacy of e-mail accounts.

Tab 4

11:56 AM

11/12/13

Accrual Basis








Utah State Bar Balance Sheet As of October 31, 2013

	Oct 31, 13	Sep 30, 13	Oct 31, 12
ASSETS			
Current Assets			
Checking/Savings	625	625	625
1010 · Petty Cash	81,717	89,910	218,602
1011 · Cash in Bank	5,327,756	5,723,394	5,024,199
1060 · ILM Invested Funds Market Value	5,410,097	5,813,929	5,243,426
Total Checking/Savings			
Accounts Receivable	16,189	4,821	(1,745)
1071 · Accounts receivable	16,189	4,821	(1,745)
Total Accounts Receivable			
Other Current Assets			
1070a · Other Accounts Receivable	186	0	1,306
1089 · Unbilled tenant costs	39	19,524	18,699
1100 · Prepaid Expense	78,246	77,400	75,014
1919 · Section ILM net earn recvble	4,570	4,457	4,267
1920 · A/R - Section Funds	31,915	17,961	11,218
Total Other Current Assets	114,956	119,342	110,505
Total Current Assets	5,541,243	5,938,092	5,352,186
Fixed Assets			
1500 · Property & Equipment	3,596,936	3,584,335	3,200,457
1550 · Accumulated Depreciation	(3,064,636)	(3,060,729)	(3,012,287)
1600 · Land	633,142	633,142	633,142
Total Fixed Assets	1,165,442	1,156,748	821,312
TOTAL ASSETS	6,706,685	7,094,840	6,173,497
LIABILITIES & EQUITY			
Liabilities			
Current Liabilities			
Accounts Payable	575	6,500	
2001 · A/P - Trade	575	6,500	
Total Accounts Payable			
Other Current Liabilities	319,514	306,876	182,399
2010 · Other Accounts Payable	338,325	337,067	351,962
2100 · Accrued Payables	2,710	2,710	1,844
2350 · Capital Lease Obligations-ST		250,170	5,370
2920 · A/P - Section Funds	660,549	896,823	541,575
Total Other Current Liabilities	661,124	903,323	541,575
Total Current Liabilities			
Long Term Liabilities	8,416	8,416	12,156
2400 · Capital lease obligations	8,416	8,416	12,156
Total Long Term Liabilities	669,540	911,739	553,731
Total Liabilities			
Equity			
3500 · Unrestricted Net Assets (R/E)	3,698,625	3,698,625	2,955,918
3510 · Fund Balance - Beginning	2,338,520	2,484,476	36,591
Net Income	6,037,145	6,183,101	2,627,257
Total Equity	6,706,685	7,094,840	5,619,766
TOTAL LIABILITIES & EQUITY	6,706,685	7,094,840	6,173,497





Utah State Bar
Summary Income Statement
October 31, 2013

	Year to Date			YTD %	2013/14
	Actual	Budget	Variance Fav/(Unfav)	of Ttl Bdgt	Total Budget
<u>Revenue</u>					
Licensing	\$ 3,821,863	\$ 3,795,068	\$ 26,795	98.3	\$ 3,886,900
Admissions	28,965	96,155	(67,190)	6.1	473,060
NLTP	50,450	39,996	10,454	62.6	80,600
Mgt - Service	3,286	9,881	(6,595)	18.9	17,400
In Kind Revenue	664	545	119	20.8	3,200
Mgt - Interest & Gain	16,935	1,963	14,972	112.2	15,100
Property Mgt	104,297	74,811	29,486	35.3	295,100
OPC	530	1,650	(1,120)	4.2	12,500
CMIS/Internet	300	932	(632)	10.0	3,000
CLE	145,157	77,724	67,433	37.9	383,000
Summer Convention	147,682	184,200	(36,518)	80.2	184,200
Fall Forum	8,435	34,974	(26,539)	9.5	89,100
Spring Convention	1,375	1,646	(271)	1.1	128,700
Bar Journal	49,532	42,768	6,764	37.5	132,100
Committees	-	-	-	-	100
Member Benefits	8,890	3,054	5,836	128.8	6,900
Section Support	-	-	-	-	84,348
Access to Justice	4,750	-	4,750	-	-
Commission/Sp. Proj	265	-	265	-	-
Young Lawyers Division	50	-	50	-	-
Total Revenue	\$ 4,393,426	\$ 4,365,367	\$ 28,059	75.8	\$ 5,795,308
<u>Expenses</u>			(Fav)/Unfav		
Licensing	51,656	67,402	(15,746)	30.3	170,683
Admissions	186,413	189,388	(2,975)	41.4	450,698
NLTP	32,163	33,227	(1,064)	32.6	98,632
Bar Mgt	266,377	315,854	(49,477)	40.6	655,721
Property Mgt	151,093	142,848	8,245	30.4	496,767
OPC	397,608	398,765	(1,157)	33.7	1,178,401
General Counsel	72,335	103,493	(31,158)	24.1	300,039
Computer/MIS/Internet	62,498	82,530	(20,032)	31.2	200,265
CLE	125,701	83,184	42,517	34.0	369,805
Summer Convention	233,828	207,473	26,355	104.3	224,267
Fall Forum	23,638	9,634	14,004	26.9	87,761
Spring Convention	6,803	7,832	(1,029)	8.3	81,975
Bar Journal	62,150	52,967	9,183	34.3	181,418
Committees	79,921	80,285	(364)	67.2	119,017
Member Benefits	44,241	70,466	(26,225)	25.0	177,155
Section Support	31,851	26,121	5,730	37.8	84,348
Consumer Assistance	23,173	17,674	5,499	37.5	61,858
Access to Justice	52,906	44,635	8,271	28.6	184,884
Tuesday Night Bar	12,810	3,572	9,238	98.0	13,070
Legislative	193	288	(95)	0.3	64,405
Commission/Sp. Proj	89,826	82,079	7,747	54.1	166,167
Public Education	40,454	31,739	8,715	27.5	146,922
Young Lawyers Division	7,270	16,008	(8,738)	15.1	48,000
Total Expenses	\$ 2,054,908	\$ 2,067,464	\$ (12,556)	36.9	\$ 5,562,258
Net Revenue/(Expense)	\$ 2,338,518	\$ 2,297,903	\$ 40,615		\$ 233,050
Add: Depreciation	15,627	13,372	2,255		55,363
Cash Increase/(Decrease) from Operations	\$ 2,354,145	\$ 2,311,275	\$ 42,870		\$ 288,413
Other Uses of Cash					
Change in Assets/Liabilities	49,633	49,633	-		
Capital Expenditures	29,577	550,000	(520,423)		550,000
Net Change in Cash	\$ 2,374,201	\$ 1,810,908	\$ 563,293		\$ (261,587)

1. Which Judicial District is your practice located in?

		Response Percent	Response Count
1st District		1.3%	1
2nd District		11.5%	9
3rd District		73.1%	57
4th District		6.4%	5
5th District		5.1%	4
6th District		1.3%	1
7th District		0.0%	0
8th District		1.3%	1
answered question			78
skipped question			3

2. If you were in attendance, what was your opinion of the Thursday night reception and CLE presentation: Multitasking Gone Mad: How to Practice Effectively in a Wired, Distracting, Demanding World, Irwin Karp

		Response Percent	Response Count
Excellent		58.5%	24
Good		26.8%	11
Fair		7.3%	3
Poor		7.3%	3
answered question			41
skipped question			40

3. Do you have any comments on the Thursday night reception & CLE program?

Response
Count

17

answered question

17

skipped question

64

4. Please rate the morning keynote topic - Our Crisis of Overconfidence, Randy Kiser

Response
Percent Response
Count

Excellent



62.3%

48

Good



35.1%

27

Fair



2.6%

2

Poor

0.0%

0

answered question

77

skipped question

4

5. Friday keynote comments?

Response
Count

22





answered question

22

skipped question

59

6. Please rate the luncheon keynote topic: The Art & Science of Changing Minds, Steve Hughes

		Response Percent	Response Count
Excellent		45.5%	35
Good		41.6%	32
Fair		11.7%	9
Poor		1.3%	1
answered question			77
skipped question			4




7. Luncheon keynote comments?

	Response Count
	16
answered question	16
skipped question	65




8. What type of keynote presentation interests you?

	Response Count
	25
answered question	25
skipped question	56

9. What was your overall experience at the 2013 Fall Forum?

		Response Percent	Response Count
Excellent		54.3%	44
Good		37.0%	30
Fair		8.6%	7
Poor		0.0%	0
answered question			81
skipped question			0

10. Will you attend the Fall Forum in 2014?

		Response Percent	Response Count
Yes		63.0%	51
No		1.2%	1
Maybe		35.8%	29
answered question			81
skipped question			0

11. Comments?

	Response Count
	12
answered question	12
skipped question	69

12. Please rate the tracks according to their benefit to your practice or interest:

	Excellent	Good	Fair	Poor	Rating Count
Litigation	44.6% (25)	41.1% (23)	10.7% (6)	3.6% (2)	56
General	34.7% (17)	53.1% (26)	10.2% (5)	2.0% (1)	49
Hot Topics	36.4% (16)	47.7% (21)	13.6% (6)	2.3% (1)	44
Transactional	20.0% (9)	44.4% (20)	26.7% (12)	8.9% (4)	45
Technology	38.3% (18)	36.2% (17)	17.0% (8)	8.5% (4)	47
answered question					72
skipped question					9

13. Please rate the LITIGATION breakout sessions that you attended.

	Excellent	Good	Fair	Poor	Rating Count
How Leading Lawyers Think: Case Evaluation and Strategy	72.7% (24)	24.2% (8)	3.0% (1)	0.0% (0)	33
We're Off to See the Wizard! Technology in Federal Court	35.7% (5)	28.6% (4)	35.7% (5)	0.0% (0)	14
The Clock is Ticking! Using Limited Deposition Time Wisely, Part 1	62.5% (15)	25.0% (6)	8.3% (2)	4.2% (1)	24
The Clock is Ticking! Using Limited Deposition Time Wisely, Part 2	66.7% (12)	22.2% (4)	5.6% (1)	5.6% (1)	18
Is Facebook Your Friend? Using Social Media to Build Your Case	33.3% (6)	55.6% (10)	11.1% (2)	0.0% (0)	18
answered question					48
skipped question					33

14. Please rate the GENERAL PRACTICE breakout sessions that you attended.

	Excellent	Good	Fair	Poor	Rating Count
How to Become Involved With the Community as a Lawyer/Leader	25.0% (2)	50.0% (4)	25.0% (2)	0.0% (0)	8
Mastering the Inter-generational Puzzle	62.5% (5)	25.0% (2)	12.5% (1)	0.0% (0)	8
Making a Great and Lasting First Impression	55.0% (11)	45.0% (9)	0.0% (0)	0.0% (0)	20
Violence and Threats Against the Utah Legal Profession: What is Occurring and How to Respond	41.7% (5)	50.0% (6)	0.0% (0)	8.3% (1)	12
Drafting & Defending Confidentiality, Non-compete and Non-solicitation Agreements	37.5% (6)	56.3% (9)	0.0% (0)	6.3% (1)	16
answered question					41
skipped question					40

15. Please rate the HOT TOPIC breakout sessions that you attended.

	Excellent	Good	Fair	Poor	Rating Count
Being Prepared for Short Term and Long Term Absence from the Law Office	53.8% (7)	30.8% (4)	15.4% (2)	0.0% (0)	13
Immigration Consequences of Criminal Conduct Under the Immigration and Nationality Act	66.7% (6)	22.2% (2)	11.1% (1)	0.0% (0)	9
Handling Cases Involving Weapons, Litigation	66.7% (6)	0.0% (0)	11.1% (1)	22.2% (2)	9
What You May Not Know, But Should Know, in the Practice of Family Law	75.0% (9)	25.0% (3)	0.0% (0)	0.0% (0)	12
Keeping Emotionally Balanced Despite the Rigors of Family Law	33.3% (2)	66.7% (4)	0.0% (0)	0.0% (0)	6
answered question					34
skipped question					47

16. Please rate the TRANSACTIONAL breakout sessions that you attended.

	Excellent	Good	Fair	Poor	Rating Count
Clear and Effective Communications	41.2% (7)	35.3% (6)	17.6% (3)	5.9% (1)	17
Overcoming Procrastination – How to Kick the Habit	45.0% (9)	40.0% (8)	5.0% (1)	10.0% (2)	20
Tax Law	46.2% (6)	30.8% (4)	23.1% (3)	0.0% (0)	13
Representing Buyers & Sellers in Residential Real Estate Transactions: What You Need to Know	28.6% (4)	42.9% (6)	7.1% (1)	21.4% (3)	14
Asset Protection Trust	31.6% (6)	42.1% (8)	26.3% (5)	0.0% (0)	19
answered question					43
skipped question					38

17. Please rate the TECHNOLOGY breakouts that you attended.

	Excellent	Good	Fair	Poor	Rating Count
eFiling – A Debriefing	55.6% (5)	44.4% (4)	0.0% (0)	0.0% (0)	9
Digital Assets – Yours & Your Clients: What Happens After Death	60.9% (14)	30.4% (7)	8.7% (2)	0.0% (0)	23
Technology to Rival the NSA: Making Your Target Transparent	50.0% (3)	16.7% (1)	16.7% (1)	16.7% (1)	6
Ethics in the Clouds	42.1% (8)	36.8% (7)	21.1% (4)	0.0% (0)	19
Client Management Tools for Dummies	83.3% (10)	16.7% (2)	0.0% (0)	0.0% (0)	12
answered question					39
skipped question					42

18. Please comment on any of the breakout(s) that you attended:

Response
Count

5

answered question

5

skipped question

76

19. Please list topics you would like to see at a future Fall Forum:

Response
Count

13

answered question

13

skipped question

68

20. If you would be interested in becoming a member of the Fall Forum 2014 Planning Committee please provide your name and Bar Number.

Response
Count

5



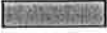
answered question

5

skipped question

76

21. What is your opinion of the range and selection of vendors at the Fall Forum?

		Response Percent	Response Count
Excellent		40.0%	28
Good		44.3%	31
Fair		15.7%	11
Poor		0.0%	0
answered question			70
skipped question			11

Page 2, Q3. Do you have any comments on the Thursday night reception & CLE program?

1	spending that much time on such a simple principle that most were already aware of????? He did a good job in presentation, but was only right on about 80%, which was pretty obvious. It was entertaining, but CLE? Not really	Nov 25, 2013 10:54 AM
2	Not necessary.	Nov 21, 2013 9:53 AM
3	great! do it again soon	Nov 20, 2013 10:31 PM
4	Loved it	Nov 20, 2013 6:06 PM
5	I didn't attend.	Nov 20, 2013 5:09 PM
6	It seemed a little out of date referencing blackberry phones. Also, too much time was spent on the ills of multitasking with very little about what can be done about it! Not impressed.	Nov 20, 2013 4:04 PM
7	Yes. I thought the content could have been delivered in a less drawn-out manner.	Nov 20, 2013 3:18 PM
8	I didn't attend. It did not appear relevant enough to me.	Nov 20, 2013 2:46 PM
9	I did not attend Thursday night.	Nov 20, 2013 1:51 PM
10	Did not attend	Nov 20, 2013 1:00 PM
11	The presenter was unable to present anything of value. He was also offensive and inappropriate at times during his presentation.	Nov 20, 2013 11:53 AM
12	Good presenter. Nice for professional & management.	Nov 20, 2013 11:29 AM
13	Reception was nice; speaker was so-so.	Nov 20, 2013 11:22 AM
14	no	Nov 20, 2013 11:14 AM
15	The room was freezing. Presentation and food were good.	Nov 20, 2013 10:57 AM
16	I could not make that meeting. Sorry.	Nov 20, 2013 10:54 AM
17	WELL DONE, BUT THE SPEAKER SUCKED.	Nov 20, 2013 10:08 AM

Page 2, Q5. Friday keynote comments?

1	Though it was valuable information, he failed to get one important point across, which is if everyone settles, no one will be able to walk softly and carry a big stick anymore because trial skills will be a thing of the past.	Nov 25, 2013 10:54 AM
2	Now, if only I could convince my clients	Nov 22, 2013 9:22 AM
3	Nice to see the stats. Don't be so confident in my case.	Nov 21, 2013 9:42 AM
4	Would have liked to be able to get his book.	Nov 21, 2013 9:37 AM
5	excellent	Nov 20, 2013 10:31 PM
6	Fantastic information and presentation.	Nov 20, 2013 7:22 PM
7	Great	Nov 20, 2013 6:06 PM
8	Very good presentation.	Nov 20, 2013 5:09 PM
9	After the keynote address I fell ill and had to leave. I'm "attending" by studying the furnished materials.	Nov 20, 2013 3:57 PM
10	This was an eye-opening presentation that provided real-world helpful information that will help my performance.	Nov 20, 2013 3:18 PM
11	I don't think I'm overconfident. I certainly don't know everything, and rely on colleagues and prayer, to be honest.	Nov 20, 2013 2:48 PM
12	I thought it was interesting. Never heard of this topic before. It sure is true!	Nov 20, 2013 1:55 PM
13	One of the best presentations ever given at a CLE. The speaker did a nice job. The material and the statistics and using those to reshape my thinking in how I practice law was superb. It ought to be presented at least every other year.	Nov 20, 2013 1:51 PM
14	Started slow but picked up	Nov 20, 2013 1:00 PM
15	I thought this was some unbelievably helpful information. We will be passing it along to our clients to help them decide how to proceed.	Nov 20, 2013 12:35 PM
16	Good. Again I liked management focus.	Nov 20, 2013 11:29 AM
17	Wonderful speaker and very applicable to the practice of law.	Nov 20, 2013 11:17 AM
18	none	Nov 20, 2013 11:14 AM
19	It was interesting but not necessarily very helpful for my practice	Nov 20, 2013 11:02 AM
20	Started out somewhat slow, but made a lot of sense.	Nov 20, 2013 10:54 AM
21	I shared it with staff and family	Nov 20, 2013 10:20 AM
22	Interesting topic, but bland presenter	Nov 20, 2013 10:07 AM

Page 2, Q7. Luncheon keynote comments?

1	Entertaining, but not very substantive.	Nov 26, 2013 9:27 AM
2	the topic was interesting, but he could use some presentation pointers - wasn't easy to listen to.	Nov 25, 2013 10:54 AM
3	Good practical suggestions.	Nov 21, 2013 9:42 AM
4	Mostly hype.	Nov 21, 2013 9:37 AM
5	I note that you are using one of the tactics discussed in Mr. Hughes' presentation. I started the survey with 33 percent completed!	Nov 20, 2013 10:55 PM
6	couldn't be better	Nov 20, 2013 10:31 PM
7	OK	Nov 20, 2013 6:06 PM
8	Informative.	Nov 20, 2013 5:09 PM
9	Entertaining, learned a lot about the human psyche	Nov 20, 2013 2:48 PM
10	Very engaging. Had some great thoughts that I'm hoping to employ in my life.	Nov 20, 2013 12:35 PM
11	Great energy.	Nov 20, 2013 11:29 AM
12	A bit too much "sales pitch"	Nov 20, 2013 11:17 AM
13	none	Nov 20, 2013 11:14 AM
14	Not very helpful. He was more an entertainer than for information.	Nov 20, 2013 10:54 AM
15	This comment applies to all of the presentations. I had difficulty hearing the presentations, partly because of the way the presenters spoke, and partly because of the amplification system. Mr. Kiser was the only speaker that worked hard at his understandability, speaking slowly and enunciating clearly.	Nov 20, 2013 10:30 AM
16	Very good presentation.	Nov 20, 2013 10:07 AM

Page 2, Q8. What type of keynote presentation interests you?

1	less hype, less entertaining, but real meat, i.e., information that is useful	Nov 25, 2013 10:54 AM
2	communication skills, relationship skills - topics of general interest to all lawyers	Nov 23, 2013 3:09 PM
3	Humor.	Nov 21, 2013 5:45 PM
4	Topics like negotiation are good because they apply regardless of our specific practice area. We negotiate with clients, counsel, etc. A presentation about Effective Listening may be good.	Nov 21, 2013 9:42 AM
5	Practice Operations, Rainmaking, Political Debate	Nov 20, 2013 11:14 PM
6	changing minds/ideas/perspectives	Nov 20, 2013 10:31 PM
7	Congeniality. Real Estate market trends. ADR/mediation	Nov 20, 2013 6:06 PM
8	These are ok.	Nov 20, 2013 5:09 PM
9	Motivation; improving my overall skills	Nov 20, 2013 3:53 PM
10	Ones that offer practical skills--the ones that are not taught in law school or even in our practices but will help tremendously.	Nov 20, 2013 3:18 PM
11	Ethics, entertaining yet informational. Sean Carter would be good some time.	Nov 20, 2013 2:48 PM
12	more specifically to law practice.	Nov 20, 2013 2:46 PM
13	The practical suggestions offered for making good decisions and tools for win/win resolutions.	Nov 20, 2013 2:24 PM
14	Current trends in the media, i.e., 2nd Amendment issues, legislative issues.	Nov 20, 2013 1:55 PM
15	I prefer those that put the law in proper focus (it plays a vital role in society). Those that help build our self esteem. And, those that help us not take it too serious. I think if the law is our only focus in life we become unbalanced.	Nov 20, 2013 1:51 PM
16	Any thing that is interesting and helps to improve my practice.	Nov 20, 2013 12:35 PM
17	Same type as we had at the 2013 Forum.	Nov 20, 2013 11:54 AM
18	Something like what was presented. People oriented rather than heavy substance.	Nov 20, 2013 11:29 AM
19	Effective advocacy; effectively dealing with clients, especially "difficult" clients.	Nov 20, 2013 11:17 AM
20	current events and the numerous problems with a huge regulatory fed. government that seems to always be in our faces.	Nov 20, 2013 11:14 AM
21	Men or women with experiences in the field and with other attorneys to give us good advice.	Nov 20, 2013 10:54 AM
22	The presentations for this year's keynotes and the Thursday night reception were very interesting and helpful - I would like to see more of these types of presentations.	Nov 20, 2013 10:37 AM

Page 2, Q8. What type of keynote presentation interests you?

23	One with audience participation	Nov 20, 2013 10:29 AM
24	Things that cause me to consider change	Nov 20, 2013 10:20 AM
25	Similar topics as this year.	Nov 20, 2013 10:07 AM

Page 2, Q11. Comments?

1	I'm hard to please, I admit. The Fall Forum is, however, one of the better ones. It's all relative, of course.	Nov 25, 2013 10:54 AM
2	if the purpose of mandatory CLE is legal education, it is a waste of time and money. There is no requirement that anyone actually obtain any legal education by attending CLE. The only thing that's important in MCLE is attendance, not education.	Nov 22, 2013 12:27 PM
3	The 2-hour session where James Jardine and others actually DEMONSTRATED the skills was by far the most effective and helpful session. I would like a similar hands-on-with-demonstration (and maybe even audience practice while the experts rove and offer pointers) in other areas such as Cross Examination. In other words, more training and less presentation.	Nov 21, 2013 9:42 AM
4	need a few more subjects that pique my interest such as mediation/arbitration. Many hours, perhaps a pre-Forum survey of the Bar would help with input.	Nov 20, 2013 6:06 PM
5	I only attended the litigation track.	Nov 20, 2013 5:09 PM
6	Please, please, please sit fewer people at each table for lunch. Each year I attend this conference, and every year, there are always problems being seated so closely to everyone. Someone always spills or there is an awkward situation.	Nov 20, 2013 3:18 PM
7	There is not enough time to see all the vendors. With only 15 minutes between sessions, I was only able to peruse a few vendors.	Nov 20, 2013 2:48 PM
8	It is getting expensive. The expensxe creeps up til now it is not such a good deal.	Nov 20, 2013 2:46 PM
9	I would like to see one option every hour reviewing the key cases, trends, and legislative changes for the past year; for example, real estate, civil procedure, contracts, estate planning, criminal, etc. Not a primer but an advanced presentation.	Nov 20, 2013 2:24 PM
10	First time attendee. Will go again.	Nov 20, 2013 11:29 AM
11	I love the venue. Little America does a fine job and is very convenient.	Nov 20, 2013 11:17 AM
12	none	Nov 20, 2013 11:14 AM

Page 2, Q18. Please comment on any of the breakout(s) that you attended:

1	Great to have perspective of judges, but the best thing was the actual demonstrations by the Ray Quinney Nebeker folks and James Jardine.	Nov 21, 2013 9:42 AM
2	Again, I only attended the litigation track. It was great to have so many judges on the panels. The 2 part session on depositions was excellent. It was nice to have a fact scenario with a roll play and then commentary. So many panel discussions are just what does panel member A think of x subject, then what does B think, and how about you C? In other words, opinions with no context.	Nov 20, 2013 5:09 PM
3	I repeat - due to illness I left after the keynote talk I am studying the materials provided and thus "attend" the balance of the Forum	Nov 20, 2013 3:57 PM
4	Sometimes I left one presentation to catch part of another. I was very disappointed with Residential Real Estate Transactions. It was overly simplistic, a primer, more for real estate agents than attorneys.	Nov 20, 2013 2:24 PM
5	Same comment about being able to hear and understand the speaker.	Nov 20, 2013 10:30 AM

Page 2, Q19. Please list topics you would like to see at a future Fall Forum:

1	Administrative Law track	Nov 22, 2013 9:22 AM
2	An hour of P and C Ethics.	Nov 21, 2013 9:53 AM
3	Cross examination. A key-note speaker from the military might help us remember our duties to uphold the Constitution.	Nov 21, 2013 9:42 AM
4	Practice Tips, How-Tos for office software	Nov 20, 2013 11:14 PM
5	mediation	Nov 20, 2013 6:06 PM
6	I like the tracks instead of everybody attending the same class. It is nice to be able to go to a class in another track if you want but still be able to devote the bulk of your time to your area (litigation, transactional, etc.) I hope the litigation section will continue to have a role play and an in-depth discussion on one topic (formulating written discovery, how to argue a summary judgment motion, voir dire, opening & closing statements, etc.) each year.	Nov 20, 2013 5:09 PM
7	Deposing and cross-examining expert witnesses	Nov 20, 2013 3:53 PM
8	New LLC Act	Nov 20, 2013 3:42 PM
9	trial techniques	Nov 20, 2013 2:46 PM
10	More substantive content for the main areas of practice. I am a sole practitioner and over the course of a year I have to know a little about a lot of things. I like my CLE to keep me near the cutting edge.	Nov 20, 2013 2:24 PM
11	Panel discussions on family law Family law and bankruptcy Seminal case law from the previous year	Nov 20, 2013 10:54 AM
12	How to make money as a solo practitioner without practicing PI or Criminal or Family law.	Nov 20, 2013 10:37 AM
13	more consumer related topics. foreclosure, debt collection etc	Nov 20, 2013 10:12 AM

Page 2, Q20. If you would be interested in becoming a member of the Fall Forum 2014 Planning Committee please provide your name and Bar Number.

1	Not interested in planning committee membership..	Nov 21, 2013 9:53 AM
2	I live in Cedar City, UT. Time permitting I might be able to contribute in some way. Tim Daniels UT # 10297	Nov 21, 2013 9:42 AM
3	Dan Garriott 9444	Nov 20, 2013 12:35 PM
4	RobRoy Platt (11750)	Nov 20, 2013 11:54 AM
5	Jay Kessler 8550	Nov 20, 2013 10:54 AM

Program helps new lawyers learn the ropes

■ BY KEVIN JENKINS
THE SPECTRUM

ST. GEORGE (AP) — When attorneys graduate from law school and become licensed to practice in Utah, they enter an adversarial world in which people's money and personal liberties often depend on the outcome of a day's work.

The Utah Bar Association is helping new lawyers gain a foundation of skills and ethics to meet the demands of that profession by sponsoring a mentoring program during the first year of practice, and other states are now taking notice of the state's successes.

"I wish I'd had something like this when I was going through (my first year)," Utah Bar President Curtis Jensen said. "A lot of times we learn by hard knocks. ... In law school you learn cases and the theories and the academic side of it, but the practical side — going out and being a lawyer and dealing with clients and taking a case and solving issues aren't necessarily part of the curriculum. So we felt there was a need."

Jensen, a partner in St. George civil law firm Snow Jensen & Reece, said the New Lawyer Training Program was established in July 2009 as a way for Utah attorneys in their first year of practice to gain insights from seasoned professionals and benefit from their existing networks of colleagues.

The program now has 869 volunteer professionals approved by the Utah Supreme Court as mentors for the newcomers, and as of this summer 862 new attorneys had completed the mandatory experience.

Tyson Horrocks, a former member of Jensen's practice who now works in commercial litigation and employment law in Salt Lake City, said the mentoring program helped him get a variety of real-world experiences when he was still starting his career.

"Many times, as young associates, you don't get your feet wet," Horrocks said. "I think (mentoring) helps get the ball rolling. It's meant to kind of give you a variety of paths you can get some work in."

Horrocks worked through a checklist of experiences he wanted to have under Jensen's tutelage, learning about corporate law that involved drafting documents and, as a litigation associate, about appearing in court on behalf of clients.

At times, Jensen directed him to other attorneys to gain experience with the business client work they were doing.

St. George attorney Trevor Terry also chose Jensen as a mentor even though he always expected to practice law with his father, criminal defense attorney Douglas Terry.

"My focus in law is criminal defense and personal injury. I don't handle much civil litigation," Trevor Terry said. "(But) it is important that we at least have an understanding of everything. ... Obviously, I work with Doug, my dad. I could have chosen him to be a mentor, but I decided he's already mentoring me. What I wanted to get out of the mentoring program was (input from) one of the best civil attorneys."

The program was honored

by the American Bar Association with this year's Gambrell Professionalism Award in recognition of the Utah bar's innovation in creating a mentoring experience with quality controls, targeted developmental themes and continuing education credits.

An ABA news release issued earlier this year stated the program "has made a significant regional imprint, as other Western states have turned to Utah for inspiration and an effective program blueprint."

Jensen said the mentoring program is also a key resource for ensuring attorneys learn the rules of ethics and civility they are expected to follow, whether it be in arguing a case in court or managing a client's money as they "help people through the legal entanglements of society."

"It reminds you that you are a member of a profession. A very noble profession," he said. "You need to maintain (clients') respect and honor. Your responsibility as the gatekeepers of fundamental rights. ... So many times, we're kind of the last resort."

Major motion picture to film at Reno, Lake Tahoe

■ ASSOCIATED PRESS

RENO, Nev. — Filming for a major motion picture is scheduled to begin soon in northern Nevada, something the local producer says will become more common in the years ahead as some new tax incentives for the industry kick in.

Lake Tahoe and the Reno area will serve as the backdrop for the movie with the working title "Shark Movie." It features a carnivorous beast raising havoc in the tranquil waters of the azure alpine lake. Jeffrey Spilman, a producer

with Reno Tahoe Studio, said it's a thriller being directed by a local director, Jerry Duggan. He said he can't disclose the names of the stars yet, but they include some familiar Hollywood actors.

"Names you recognize and you see," Spilman told KOLO-TV.

His Reno Tahoe Studios opened in August at the Reno Sparks Convention Center and expects to see a sharp rise in business thanks to a bill Gov. Brian Sandoval signed earlier this year granting a 19 percent tax break for filmmakers who shoot their movies in Nevada.

"The idea of the incentive is to hire local folks, do business with local companies and have an economic engine here that is really generated by the film industry," Spilman said. "Being a Reno resident here, I, of course, encourage it because that way I don't have to travel down to LA or the Bay to make films."

The tax break doesn't go into effect until Jan. 1.

Brian Perry, a local actor and producer, said the coming "Shark Movie" is the first step in setting up a production framework.

"The next couple months,

you're going to see a lot of people staging to get ready to shoot next year because they are going to want to see how that incentive will actually play out," he said.

Actor Nicholas Cage was among those who traveled to Carson City in the spring to testify before the legislators in support of the tax break.

Spilman helped lawmakers write SB165, dubbed the "film production incentive." His Reno Tahoe Studios opened inside the convention center owned and operated by the Reno-Sparks Convention and Visitors Authority.

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Program helps new lawyers learn ropes

By Kevin Jenkins
kevin@thespectrum.com

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St. George attorney Trevor Terry, right, participated in the mentoring program to help broaden his knowledge base of law issues. JUD BURKETT / THE SPECTRUM & DAILY NEWS

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ARRESTS

The Spectrum reports arrests for felony crimes, compound misdemeanors and warrants carrying a bail of at least \$750. All arrest information is taken from the jail booking log and police reports.

St. George Police Department

» Samuel Lemon Jensen 26

two charges of domestic violence in the presence of a child and a warrant. Shelton was booked into Purgatory Correctional Facility on \$5,705 bail.

» Bill Craig Tom, 40, HC 65 Box 304, Fredonia, Ariz., was arrested Monday on a warrant. Tom was booked into Purgatory Correctional Facility on \$3,000

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