

Utah State Bar Commission

Friday, June 5, 2020
Teleconference via Zoom

Agenda

- 1. 9:00 am President's Report: Herm Olsen**
 - 10 Mins.* 1.1 Report on Meeting with Chief Justice Durrant
 - 05 Mins.* 1.2 July Commission Meeting Logistics - Zoom/Safely In-Person
 - 30 Mins.* 1.3 Regulatory Reform Report
- 2. 9:45 am Discussion Items**
 - 40 Mins.* 2.1 Review Bar Survey: **Mark Morris & James Roberts (Tab 1, Page 2)**
 - 10 Mins.* 2.2 2020 Fall Forum Planning **(Tab 2, Page 244)**
 - 10 Mins.* 2.3 2021 Summer Convention Location and Dates
 - 10 Mins.* 2.4 Creation of Fund for Donations to Help Lawyers with Bar Fees
 - 15 Mins.* 2.5 Future of Virtual Hearings & Jury Trials
- 3. 11:15 am Action Items**
 - 30 Mins.* 3.1 Approve 2020-21 Budget: **Heather Farnsworth (Tab 3, Page 252)**
 - 05 Mins.* 3.2 Awards Presentation Schedule: **Heather Farnsworth (Tab 4, Page 303)**
 - 20 Mins.* 3.3 Approve Amendments to Election Rules & Procedures **(Tab 5, Page 305)**
 - 03 Mins.* 3.4 Approve Utah Legal Services Appointment Requests **(Tab 6, Page 317)**
 - 02 Mins.* 3.5 Approve Bar Staff Participation with Ethics Advisory Opinion Committee
- 4. 12:15 am Executive Session (Sent to Voting Commissioners Separately)**
- 1:00 pm Adjourn**

Consent Agenda (Tab 7, Page 326)

1. Approve Minutes of April 9, 2020 Commission Meeting
2. Approve Admission of Military Spouse

Attachments (Tab 8, Page 331)

1. Utah Foundation 2020 Report for Utah Bar Foundation on Unmet Legal Needs in Utah
2. Utah State Bar Access to Justice Commission Annual Report to the Utah Bar Foundation

Calendar

July 9	Executive Committee	12:00 Noon	Location TBA
July 16	Commission Meeting	9:00 am	Location TBA

TAB 1

2020 Utah State Bar Member Survey

Final Results

April 8, 2020



Overview

- Survey conducted between February 19 – March 12, 2020
 - Includes test groups between February 6 – 13, 2020
 - Anonymous
- Approximately 30% (3,000) of members participated
 - Emailed to members
 - Reminders via email and social media
- Cross promotion Women Lawyers of Utah survey


Goals

- Understand legal trends in Utah from membership perspective
- Compile member feedback about demographics, economics, job satisfaction, advertising
 - Specific interest from committee on work/life balance, diversity and inclusion
 - Improve service offerings for Utah State Bar members
- Compare results to 2011 to identify trends

Demographics

Female makeup in the membership has increased 18% from 2011 to 2020.


Male is still the dominating gender with 70% of the gender makeup in 2020. Females were up to 29% and 1% were undisclosed.



One-third of survey respondents said they face challenges as a lawyer due to ethnicity, gender, age, religion, nationality, disabilities, or sexual orientation.

71% of these respondents say their gender is the most common challenge, followed by age at 35% and religion at 32%.

Economics



On average, more than half of survey respondents worked over 160 hours a month but less than 200 hours a month.

52% of survey respondents worked between 160 and 200 hours per month on average in the past year.

The percentage of lawyers who work from home has increased 58% from 2011 to 2020.


12% of survey respondents work from home 76-99% of the time in 2020 as compared to 5% in 2011.

Job Satisfaction & Expectations



More than half of survey respondents say it's very likely they will stay in the legal profession until retirement.

55% say it's very likely while 27% say it's likely.



Almost half of survey respondents believe lawyers are more likely to have work-related stress as compared to other highly educated or trained individuals who have responsibility for others' safety, financial, medical, or legal welfare.

45% of survey respondents believe lawyers are more likely to have work-related stress as compared to other individuals who are responsible for others' personal welfare, while 34% believe they are significantly more likely.

Utah State Bar



More than half of survey respondents read the Utah Bar Journal monthly.

52% of survey respondents read the Utah Bar Journal each month.




96% of survey respondents receive the printed version of the Utah Bar Journal.

Only 4% receive the Utah Bar Journal digitally.

Diversity and Inclusion

Almost half of survey respondents say their firm/office implements a diversity/inclusion policy.


43% of survey respondents have a diversity/inclusion policy in their firm/office while 36% of respondents said they do not have a diversity/inclusion policy and 21% say they don't know if their firm/office has a diversity/inclusion policy.



Almost half of survey respondents have attended a CLE or other event about diversity/inclusion in the last two years.

42% of respondents have attended a CLE or other event about diversity/inclusion in the last two years.

Courts, Professionalism and Civility, and Access to Justice




The percentage of survey respondents who believe the public views lawyers *positively* has increased 24% from 2011 to 2020.

The percentage of survey respondents who believe the public views lawyers *negatively* has decreased by 20% from 2011 to 2020.

The majority of survey respondents are not aware of the *Narrowing the Access-to-Justice Gap by Reimagining Regulation* report.

72% of respondents have are not aware of the *Narrowing the Access-to-Justice Gap by Reimagining Regulation* report. Of the 28% of respondents who are aware of the report, 44% have read it.

Advertising



In 2011 the most common way to advertise services was in the Martindale-Hubbell Directory. In 2020, the most common way to advertise is through digital online advertising.

The majority of survey respondents said their firm/office advertised its legal services in the Martindale-Hubbell Directory in 2011. In 2020, online digital advertising is the most common way offices/firms advertise.



One-third of survey respondents say they allocated 0% of their office's budget for advertising in 2020.

34% of survey respondents say 0% of their office's budget is spent on any advertising.

Utah State Bar.

2020 Utah State Bar Member Survey

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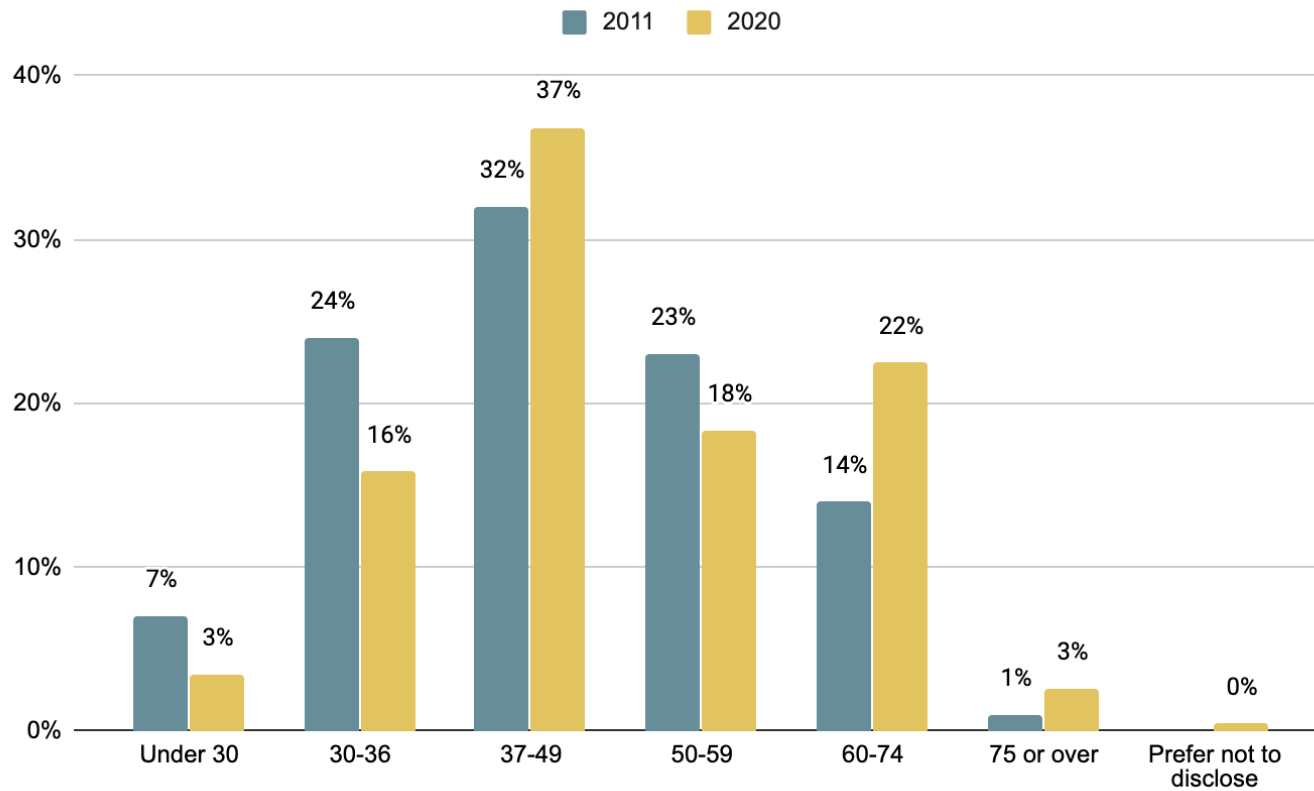
Male is still the dominating gender with 70% of the gender makeup in 2020. Females were up to 29% and 1% were undisclosed.



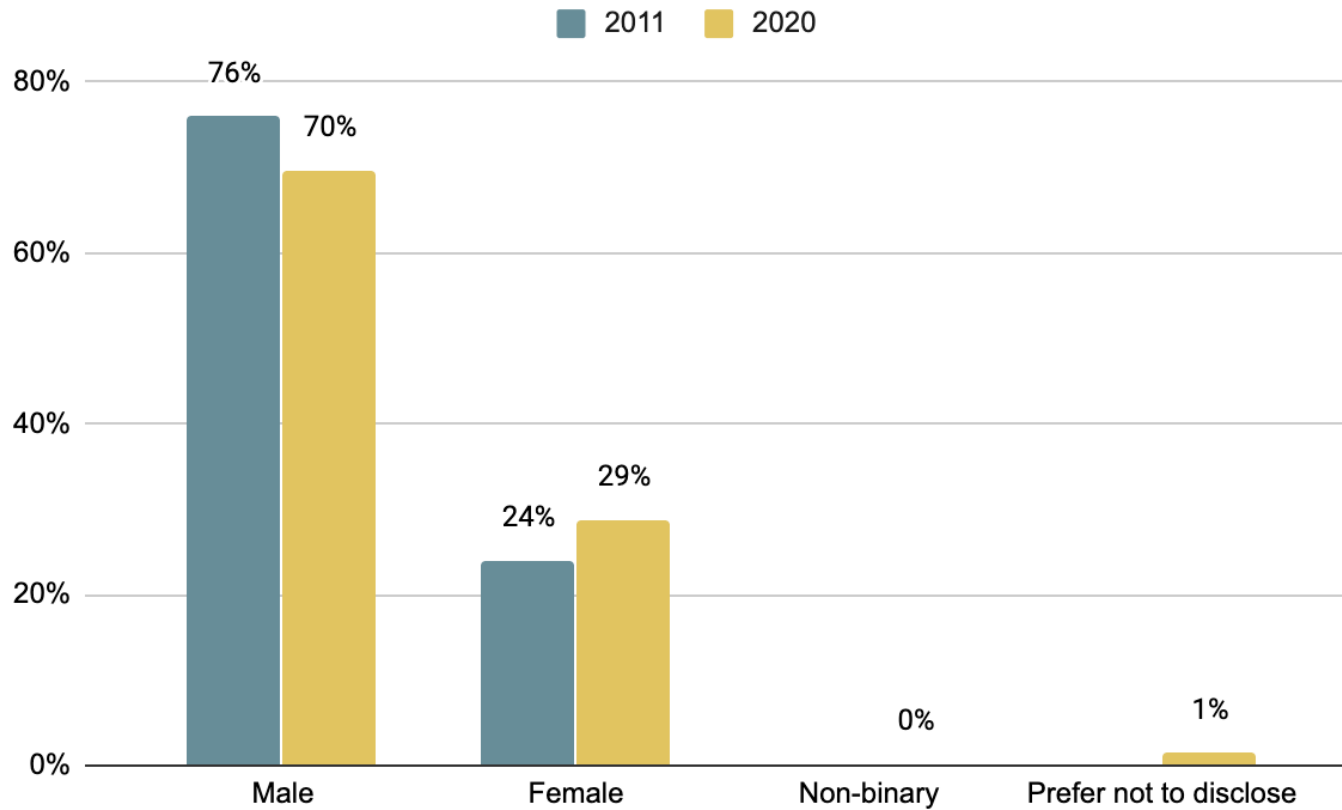
One-third of survey respondents said they face challenges as a lawyer due to ethnicity, gender, age, religion, nationality, disabilities, or sexual orientation.

71% of these respondents say their gender is the most common challenge, followed by age at 35% and religion at 32%.

What is your age?

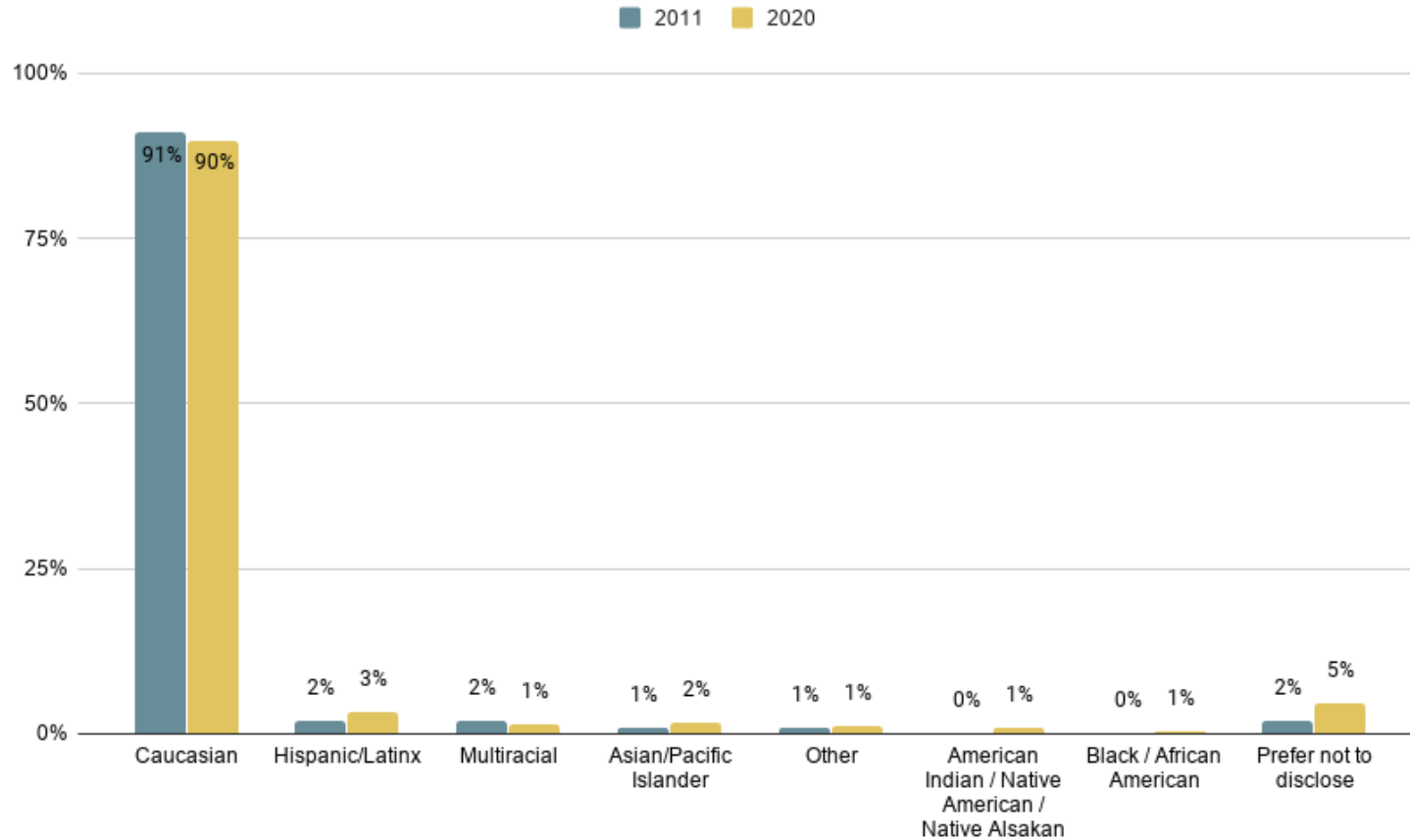


How do you identify your gender?

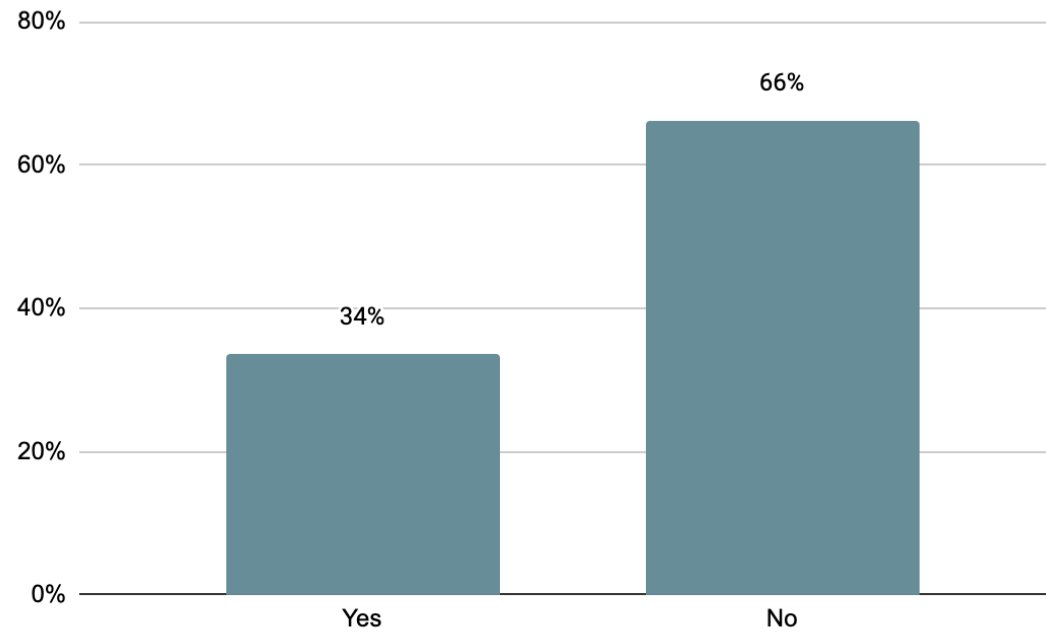


What is your ethnic or racial background?

Please select all that apply.

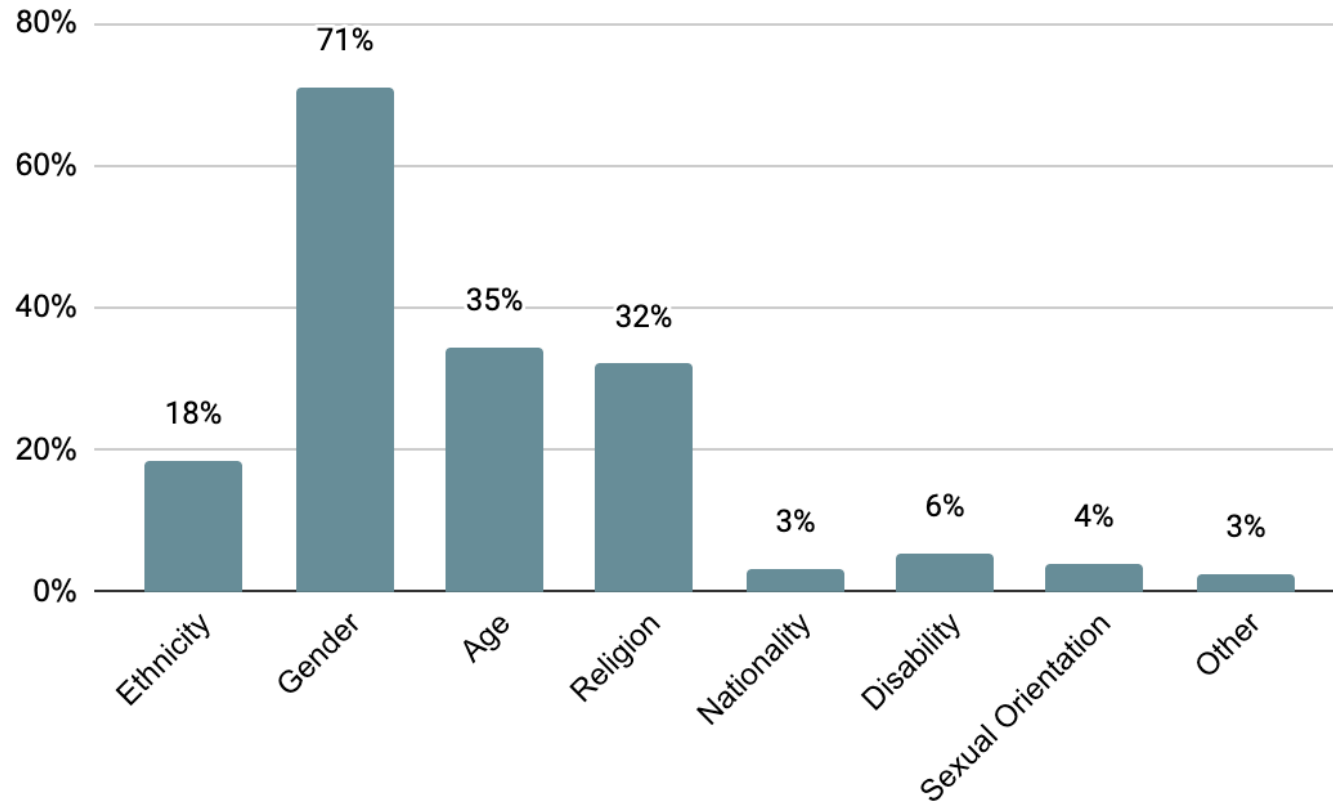


Have you experienced challenges as a lawyer due to your ethnicity, gender, age, religion, nationality, disabilities, or sexual orientation?

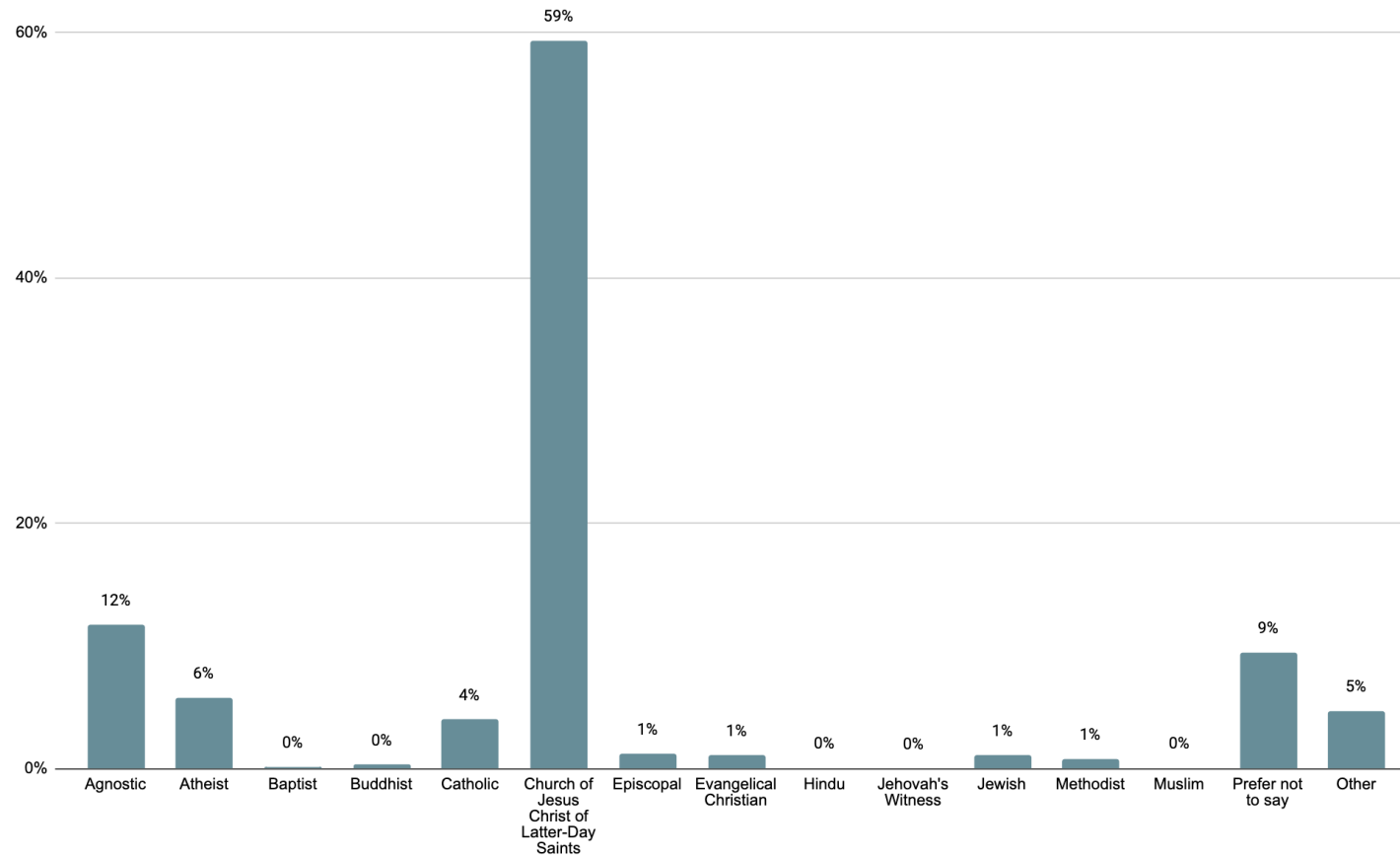


In which of the following areas have you experienced challenges as a lawyer?

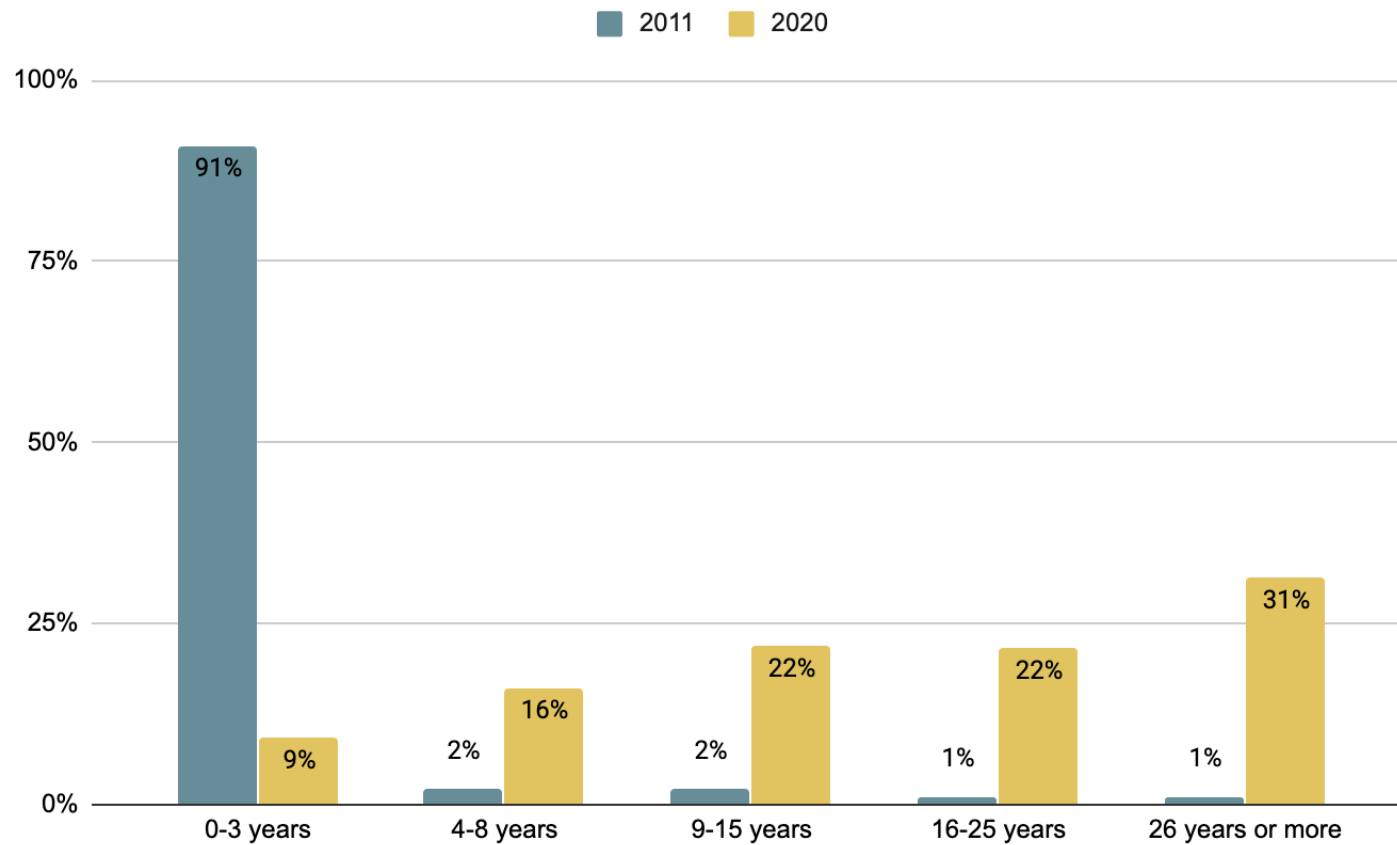
Please select all that apply.



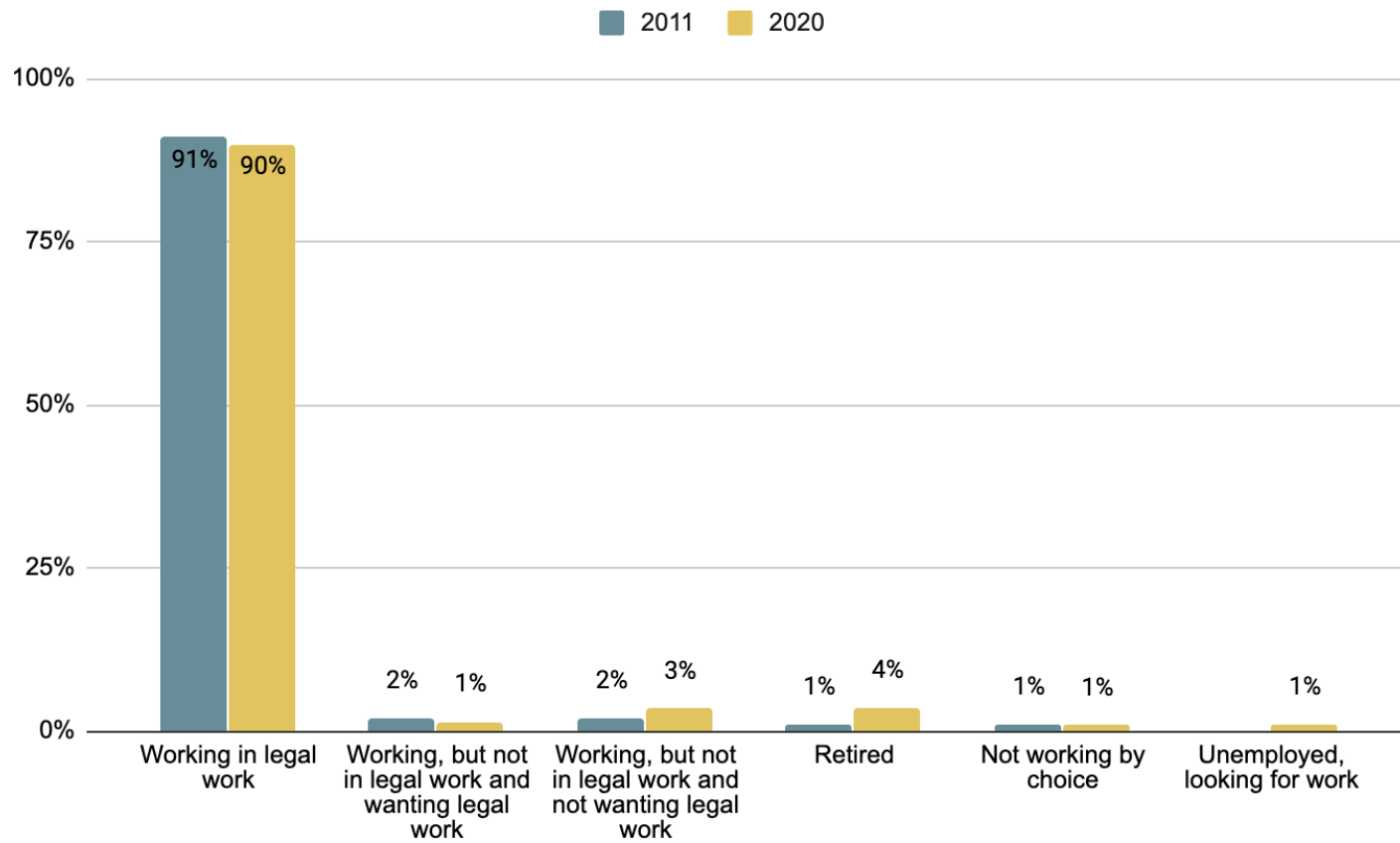
Please indicate your religious preference, if any:



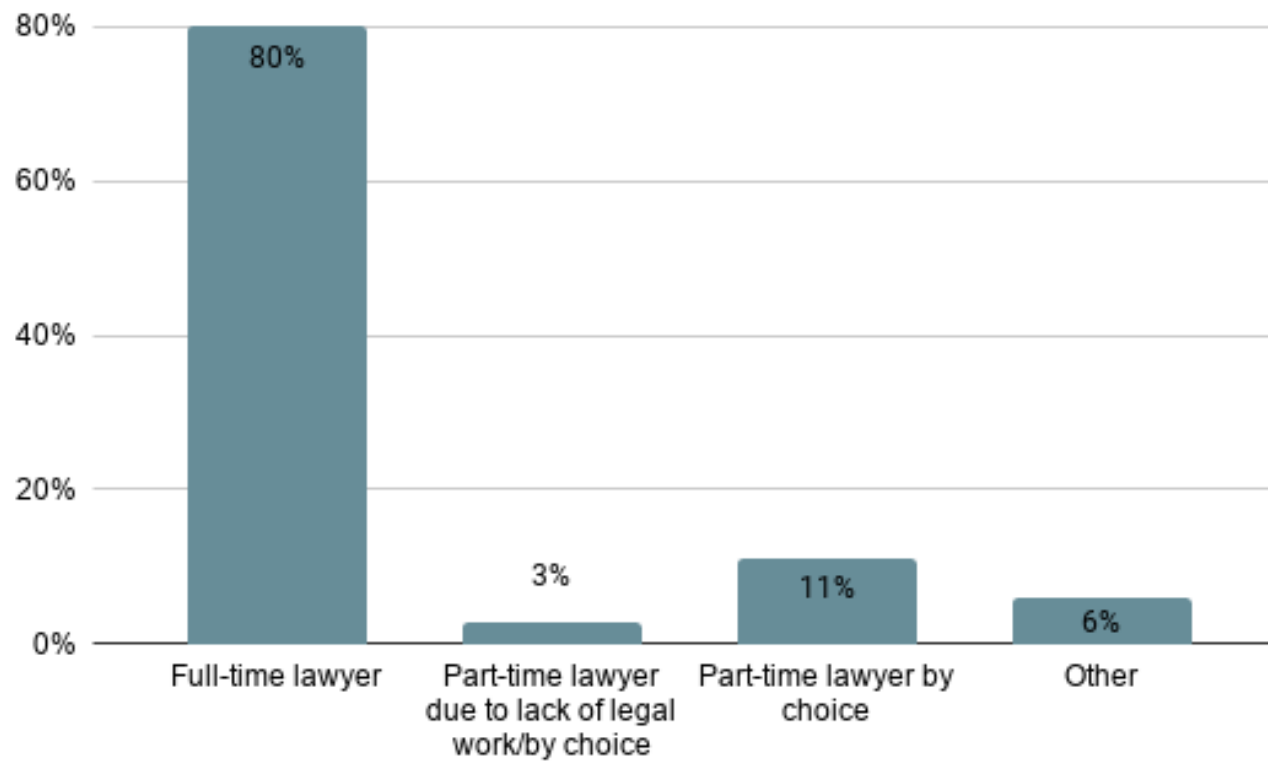
How many years have you been practicing law?



Please select the response that best describes your employment status.

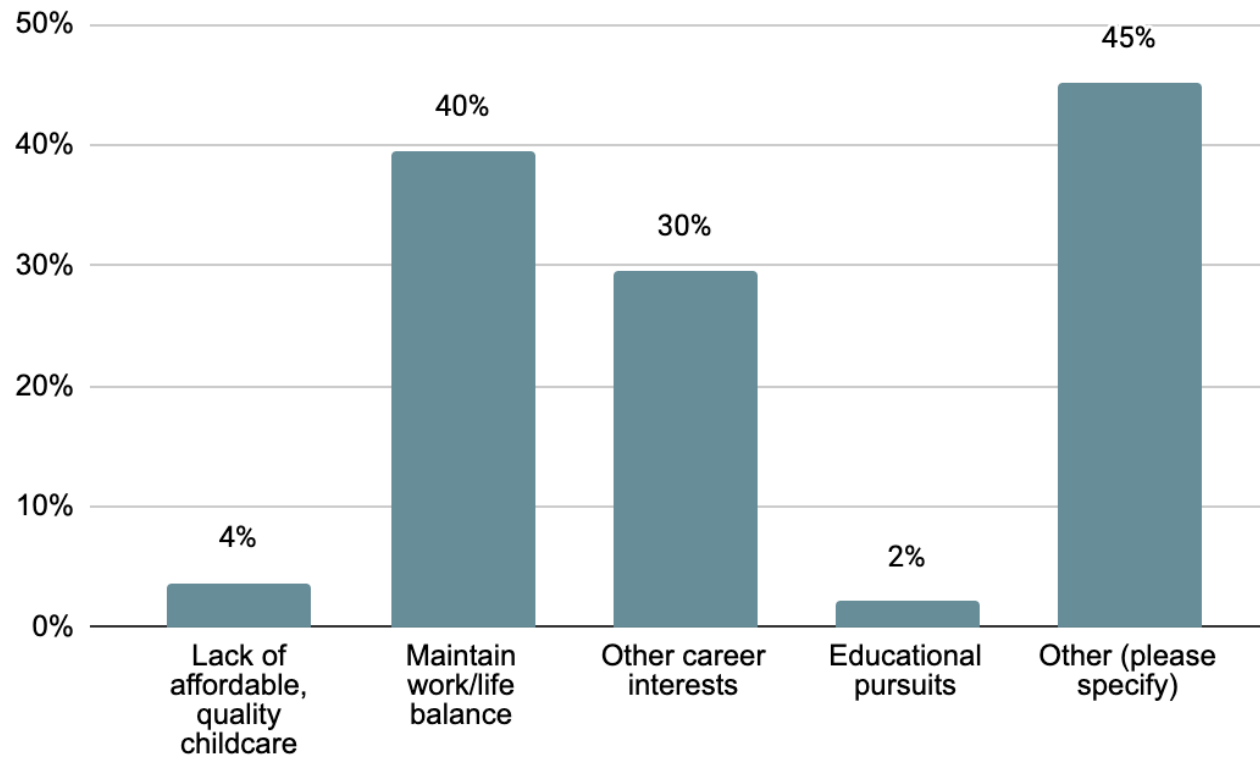


If you're currently working as a lawyer, what best describes your current level of employment?

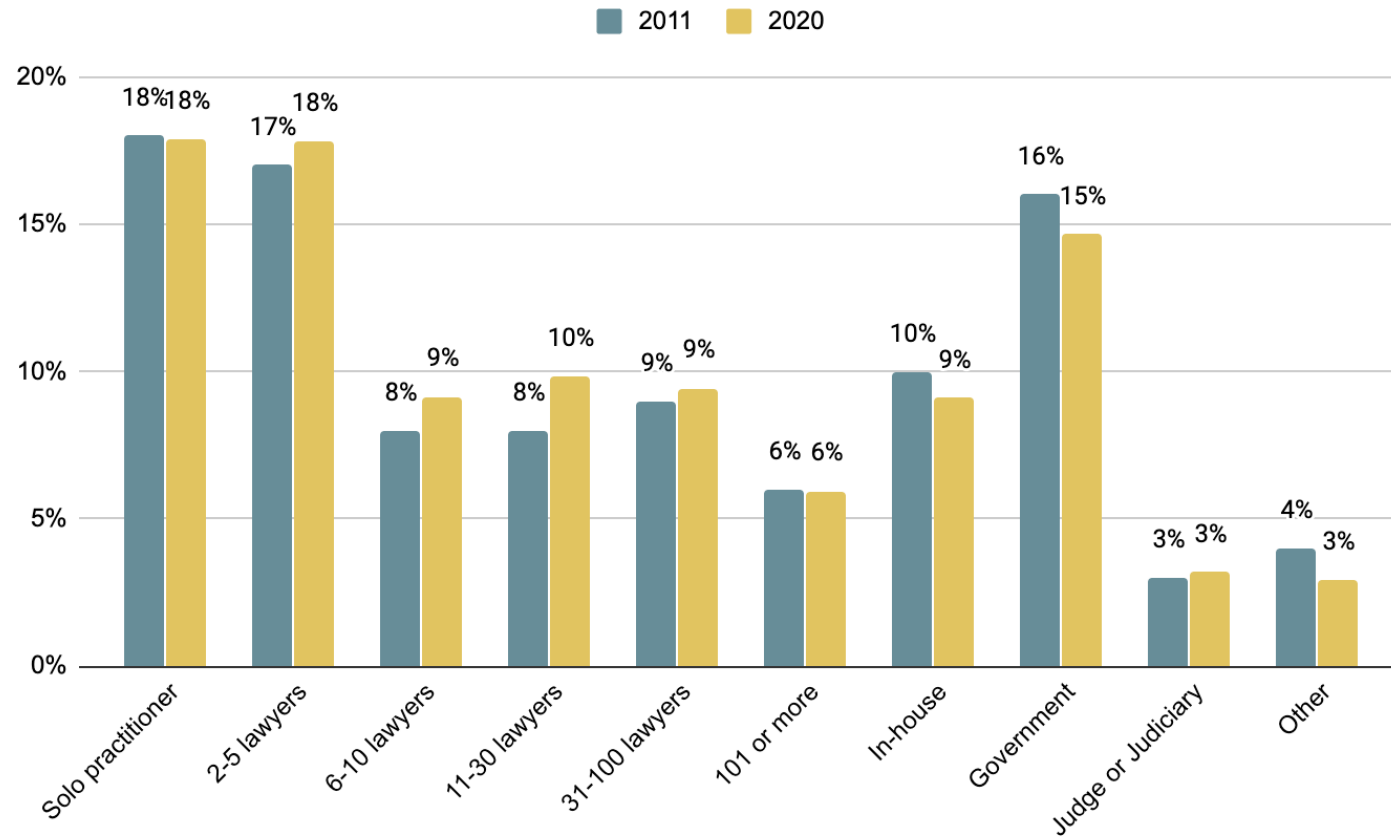


If you are working less than full time as a lawyer is it because of:

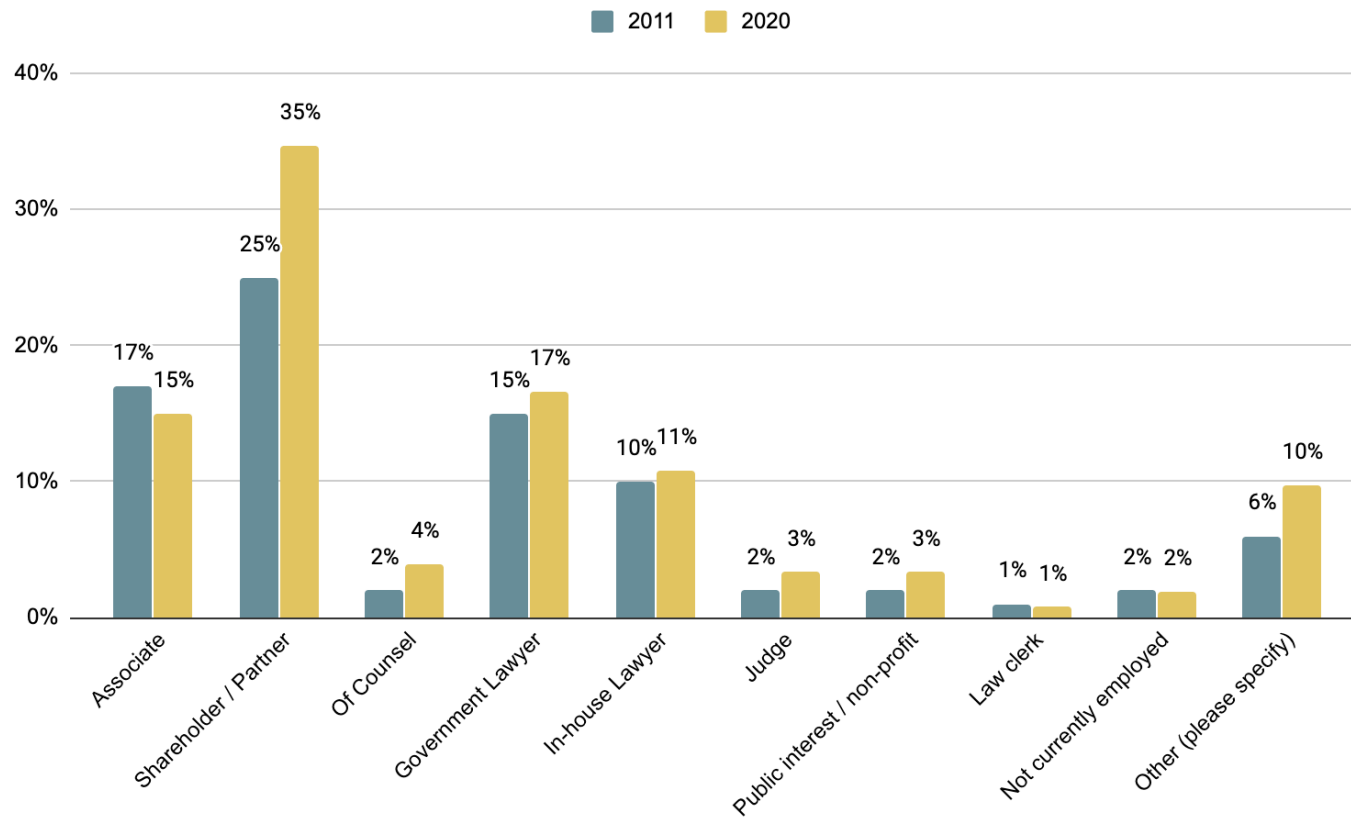
Please select all that apply.



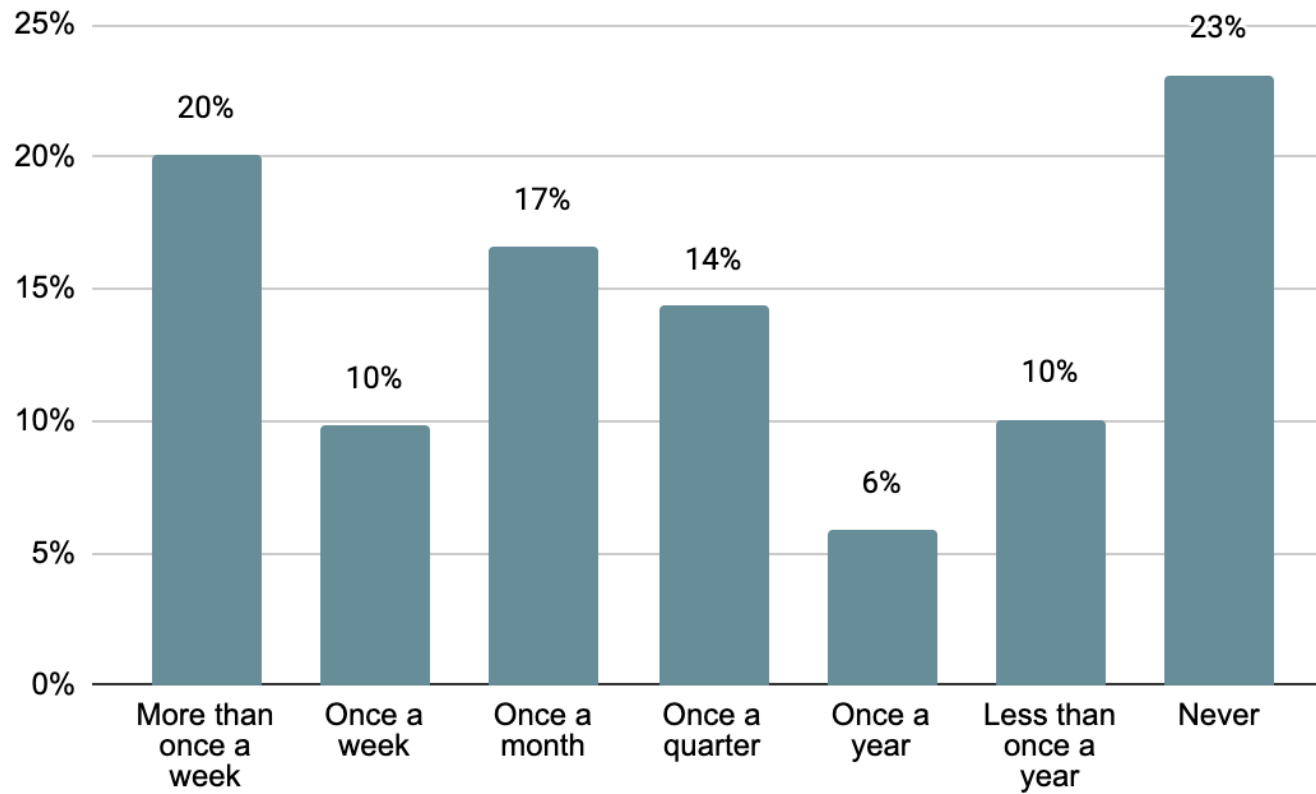
What size / type is your office?



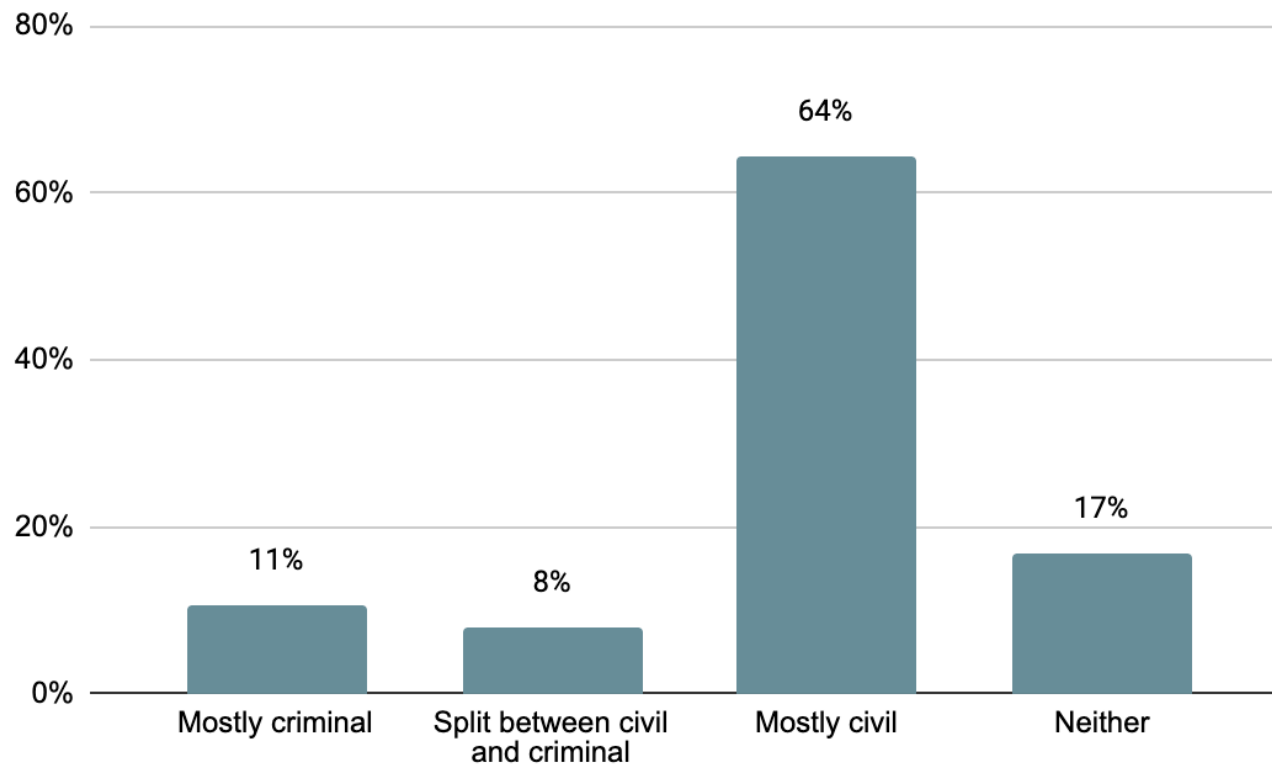
What position do you currently hold?



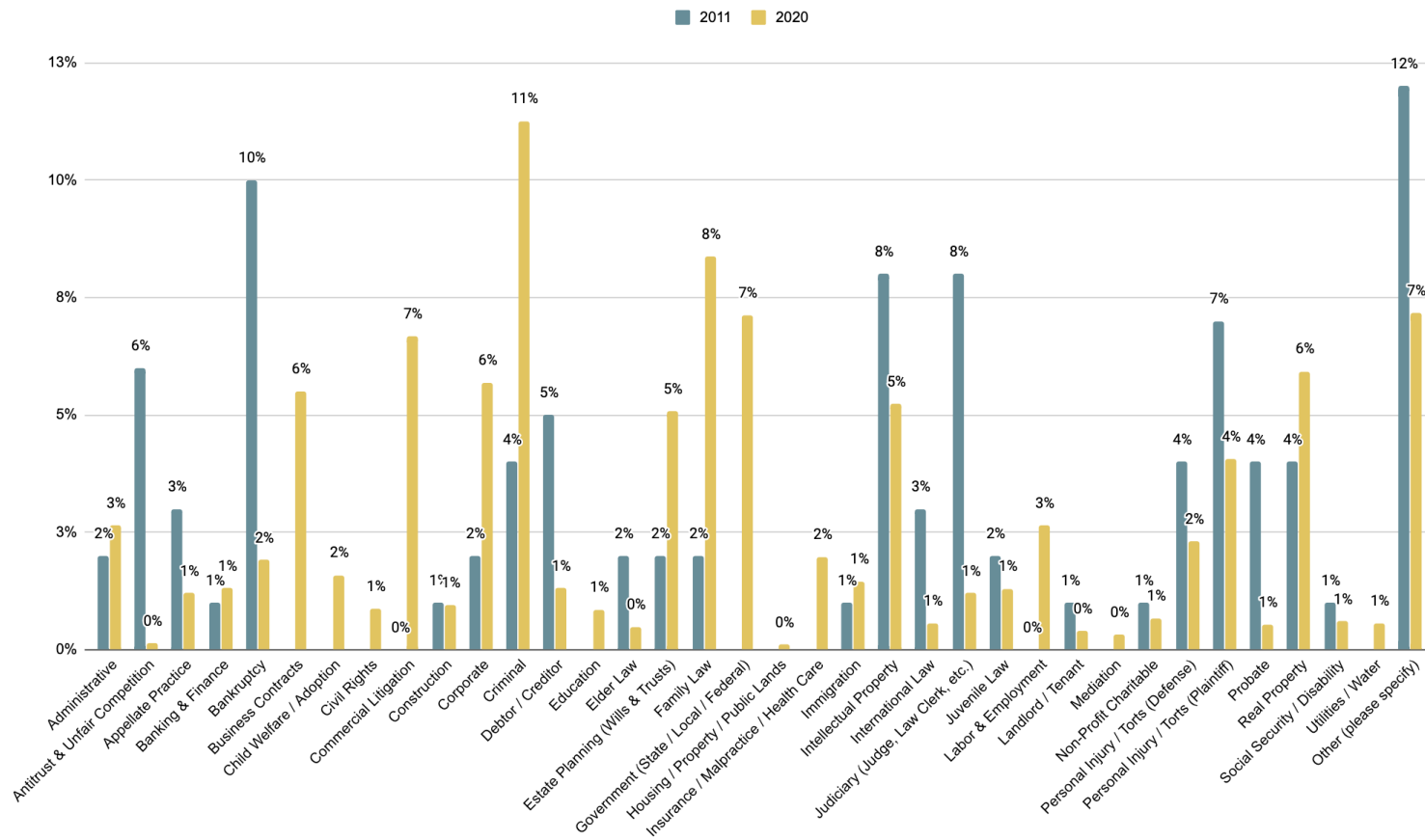
How often do you go to court?



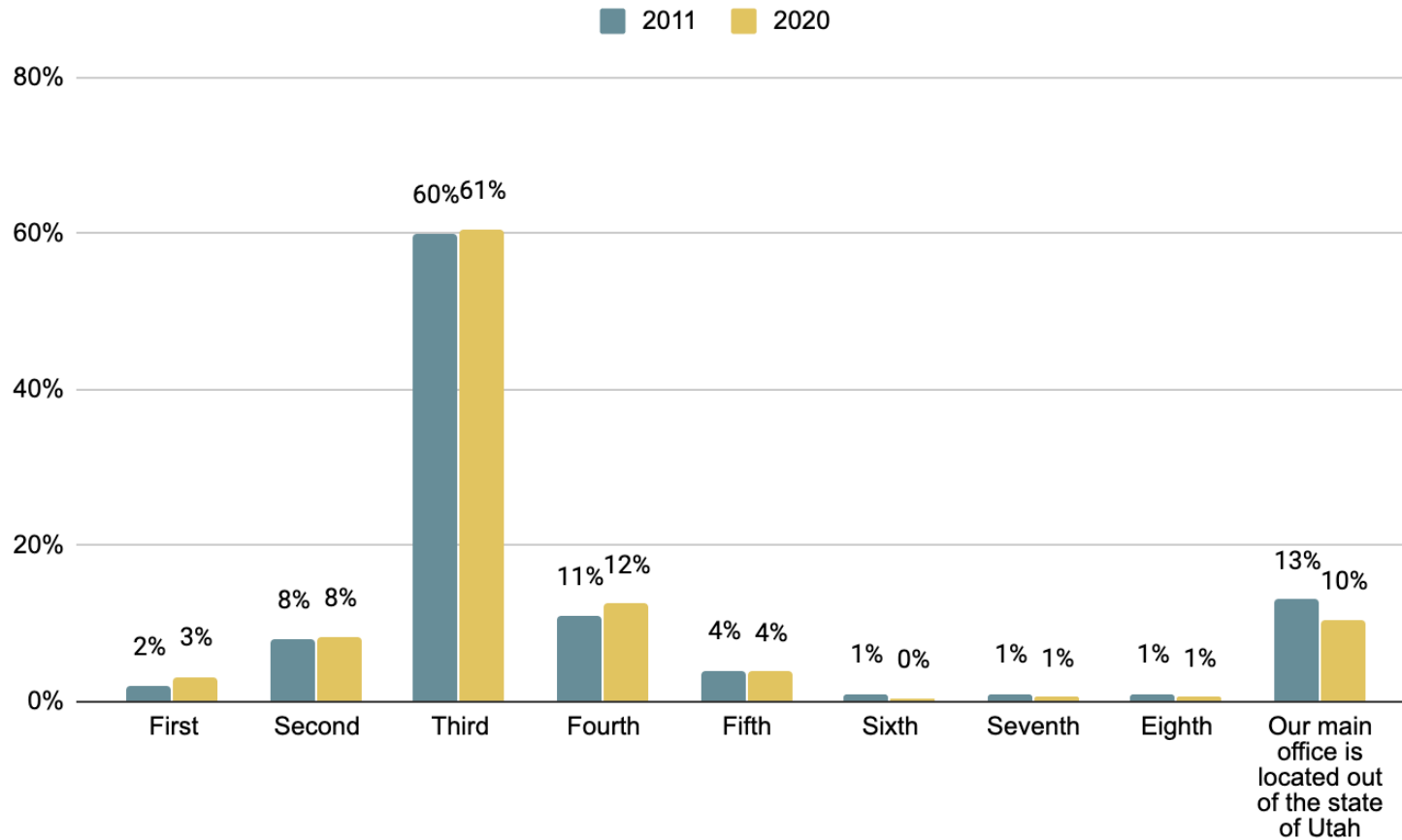
How much of your practice is civil or criminal legal work?



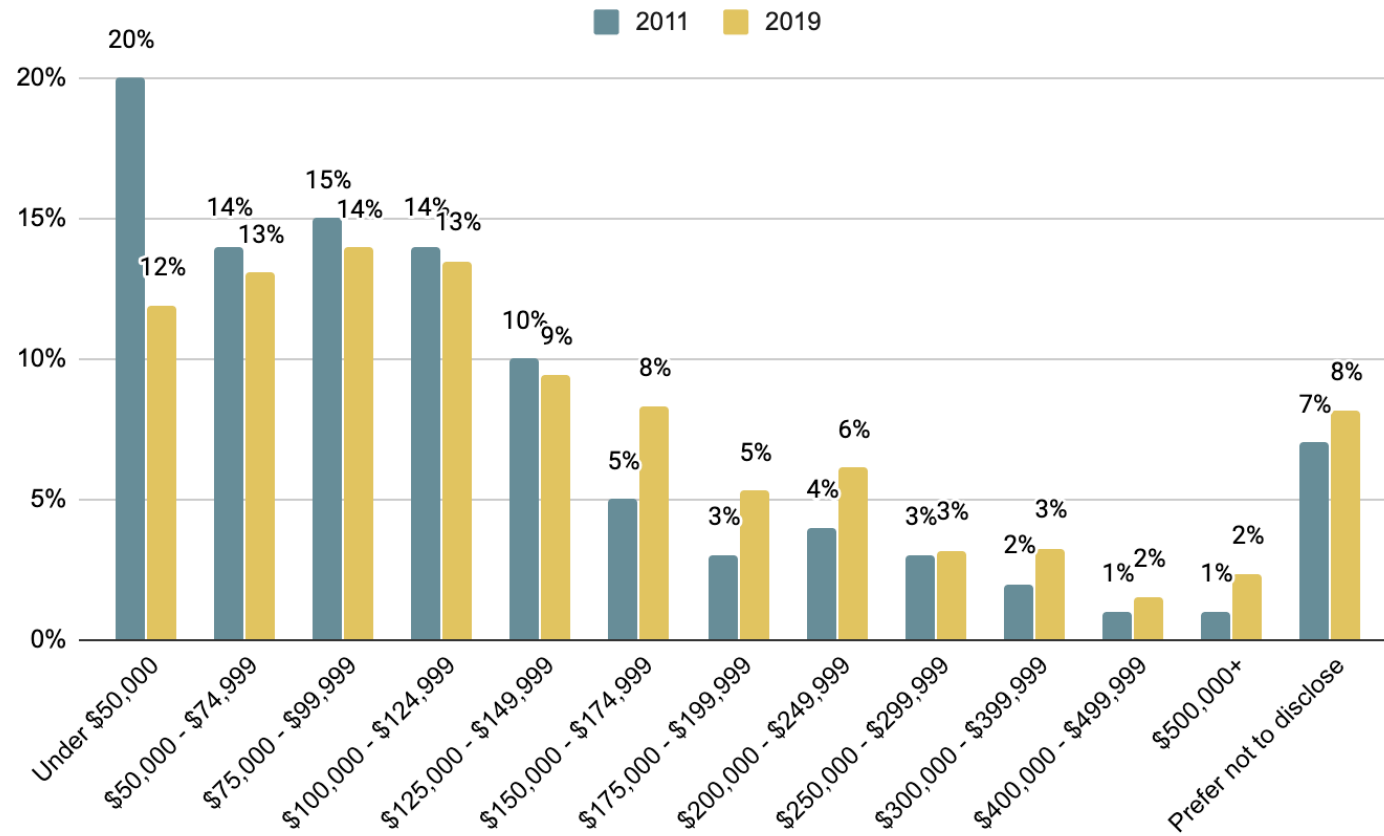
What area of practice represents 50% or more of your practice in the last year?



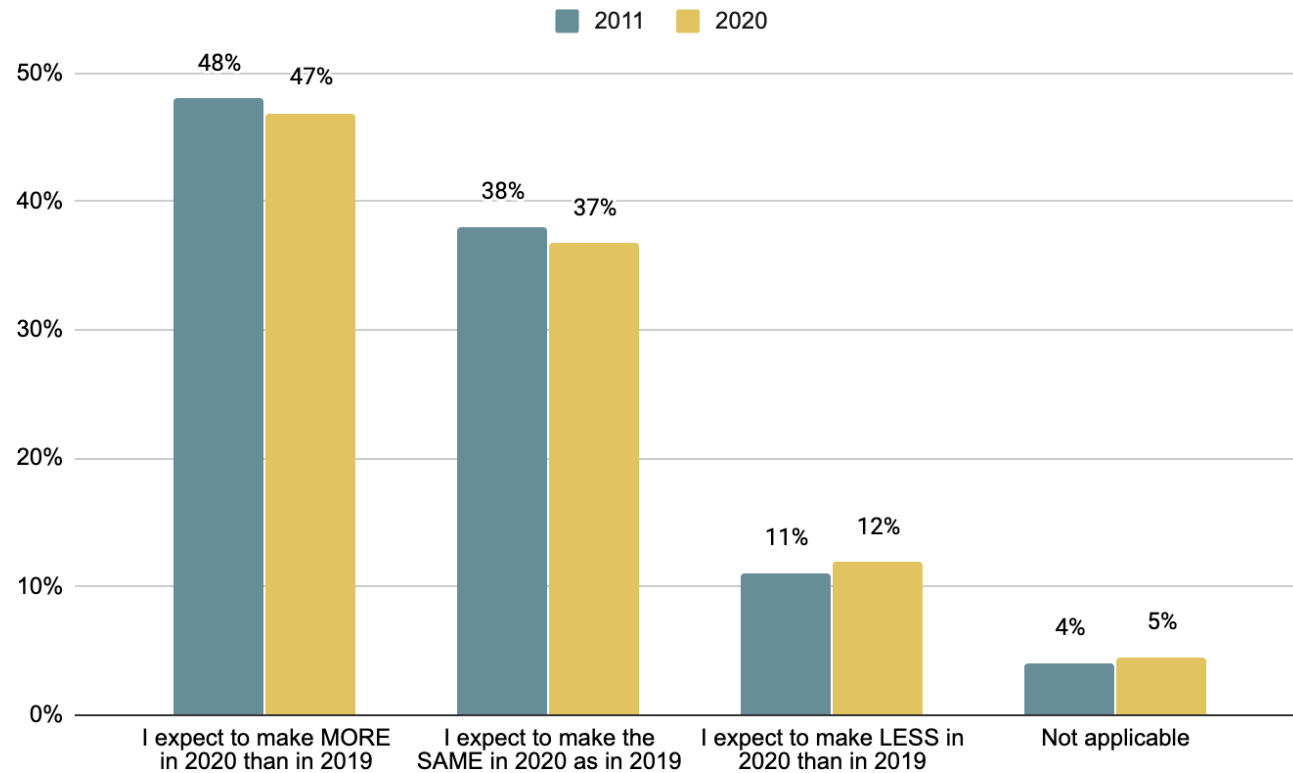
In what Utah judicial district is your main office located?



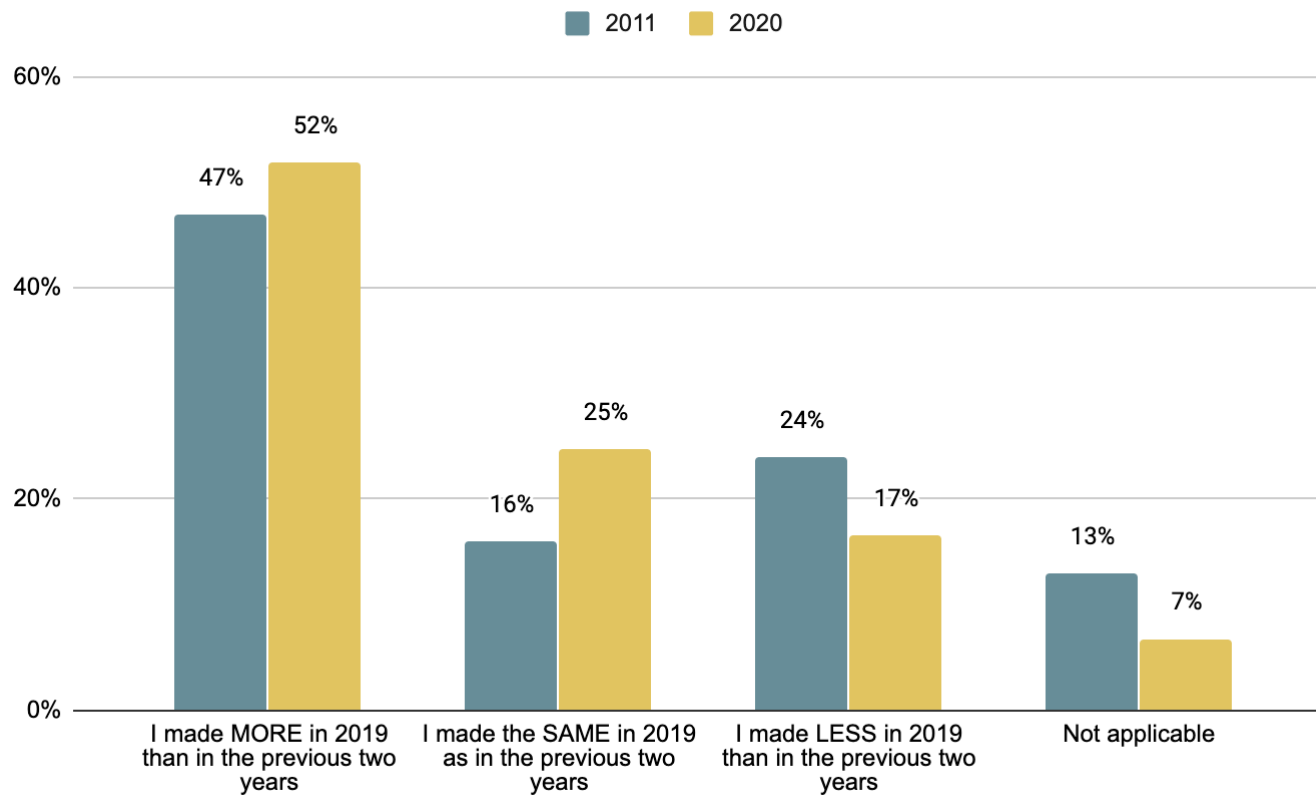
What was your 2019 personal law-related income?



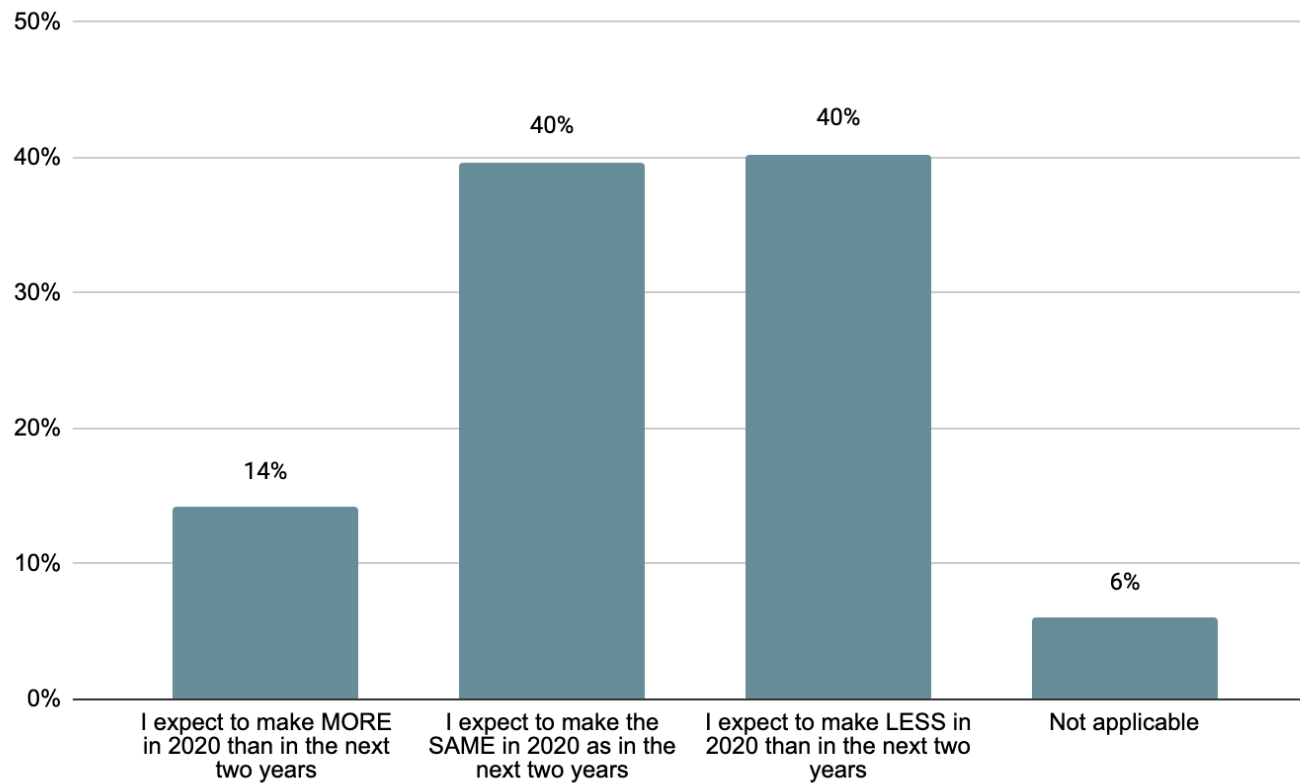
How do you expect your 2020 personal law-related income to compare to what it was in 2019?



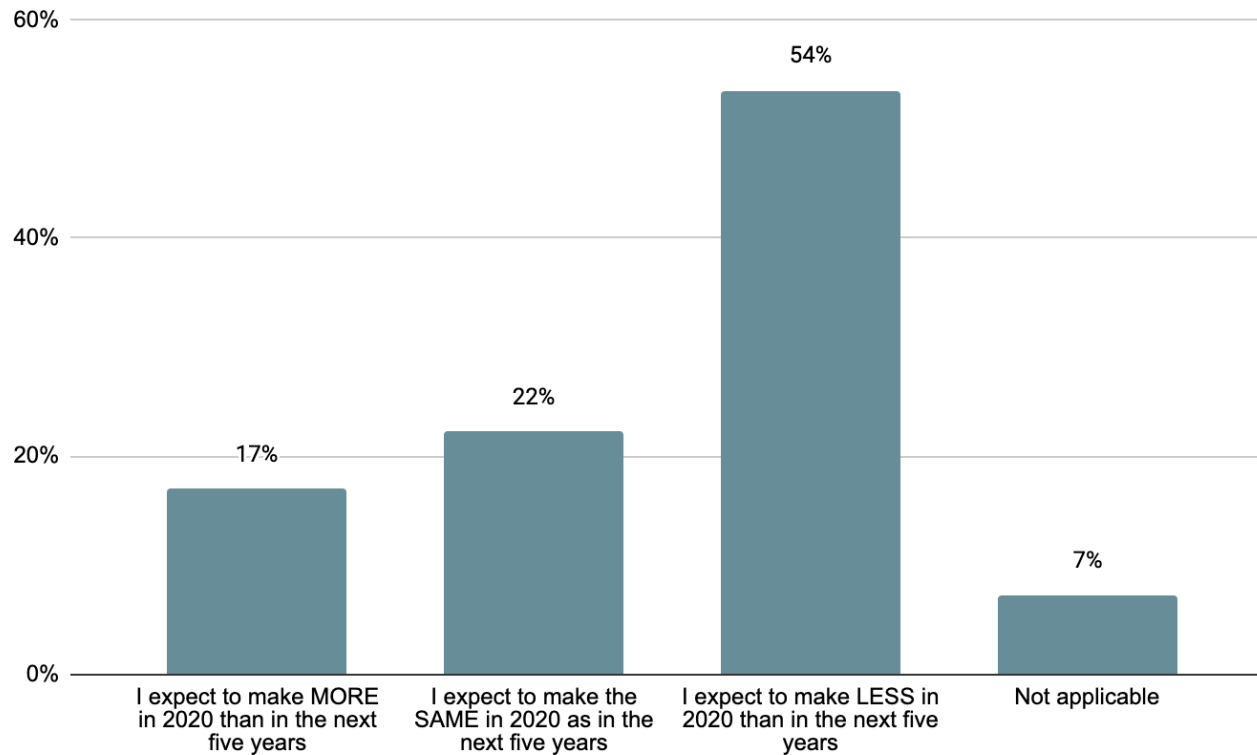
How does your 2019 personal law-related income compare to the previous two years?



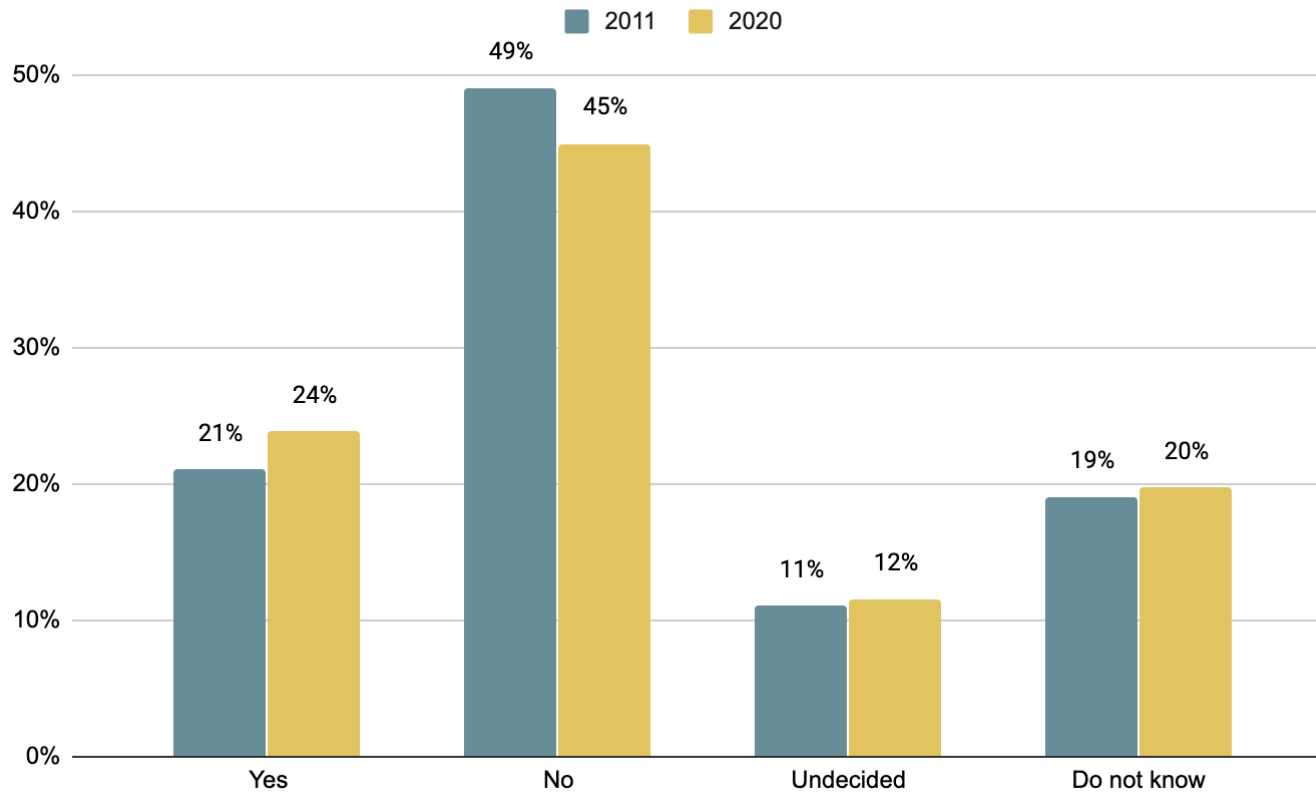
How do you expect your 2020 personal law-related income to compare to what it will be in the next two years?




How do you expect your 2020 personal law-related income to compare to what it will be in the next five years?



Does your office plan to hire recent law school graduates in the next year?




Economics



On average, more than half of survey respondents worked over 160 hours a month but less than 200 hours a month.

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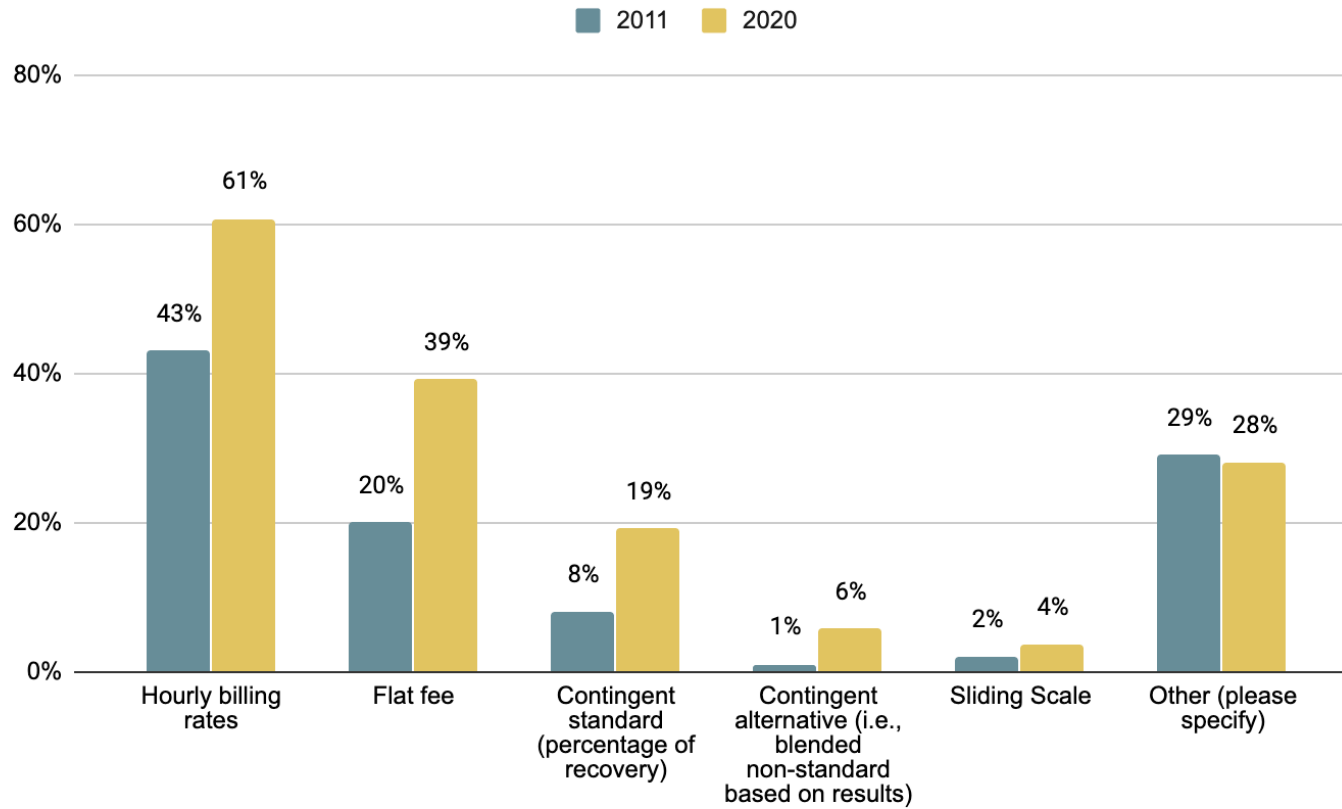


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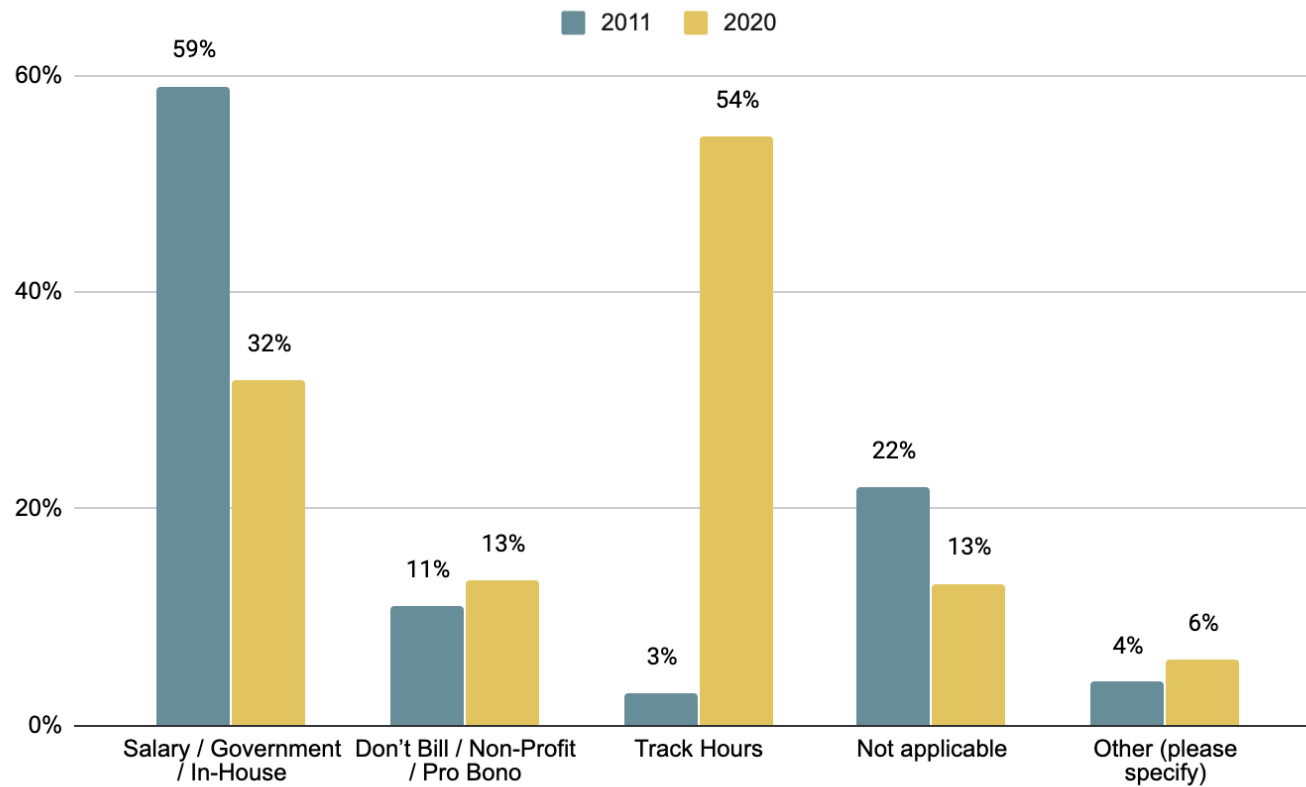
What billing methods have you used this year (by percentage of your practice)?

Please select all that apply.

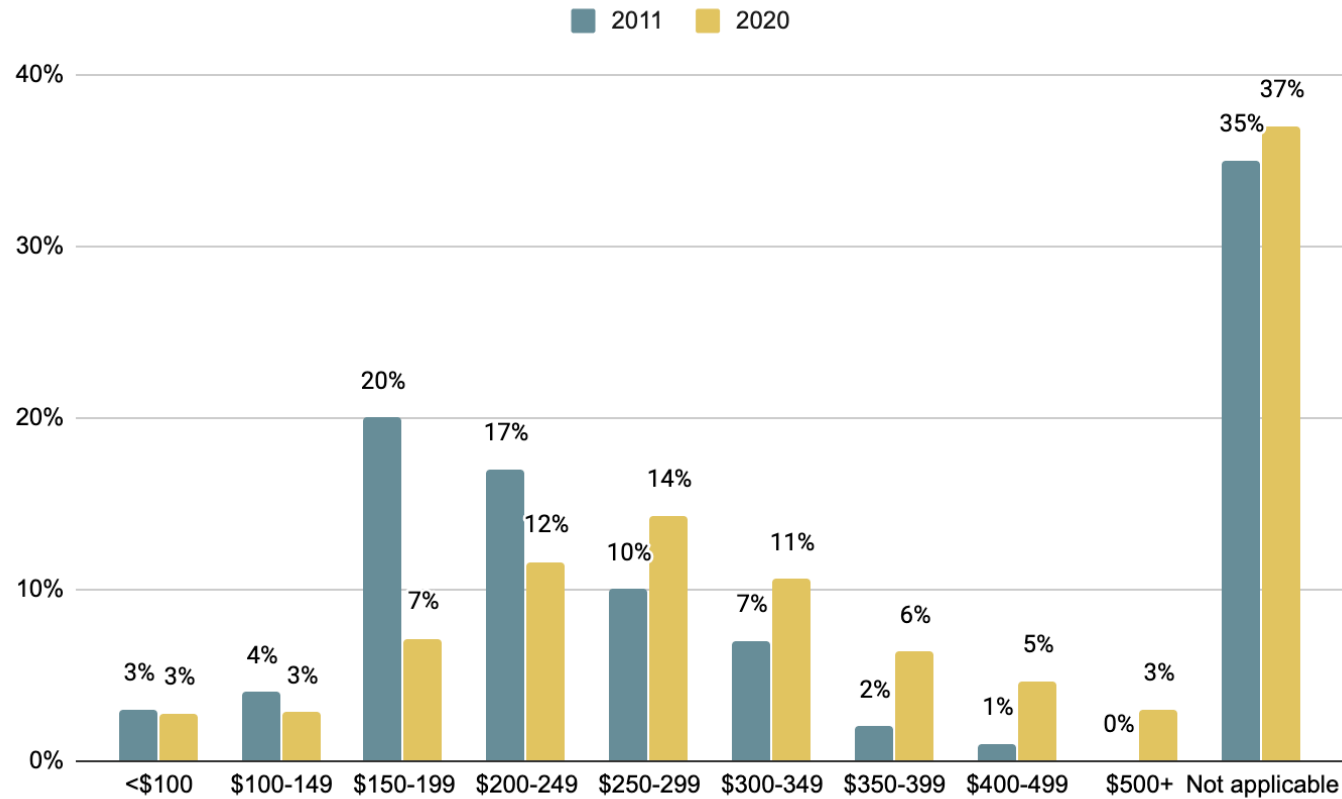


What billing methods have you used this year?

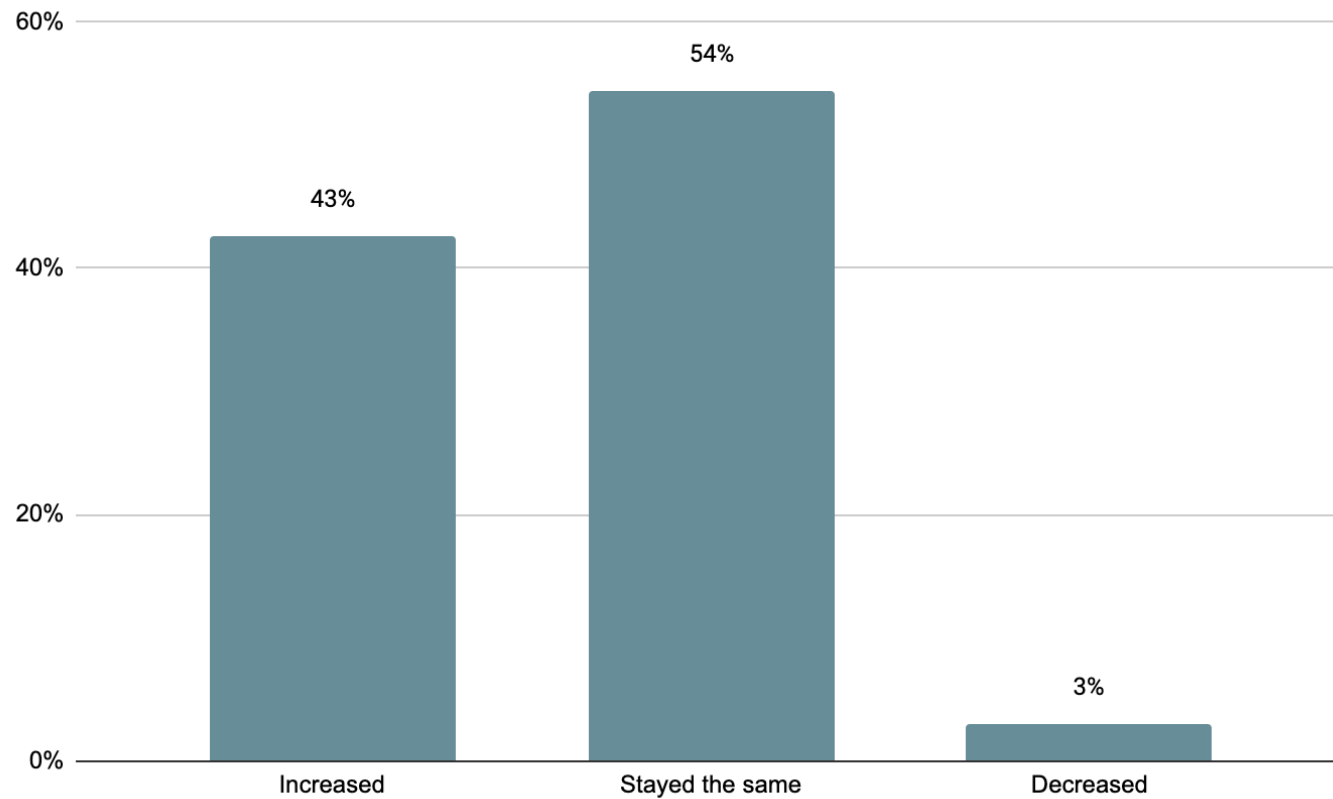
Please select all that apply.



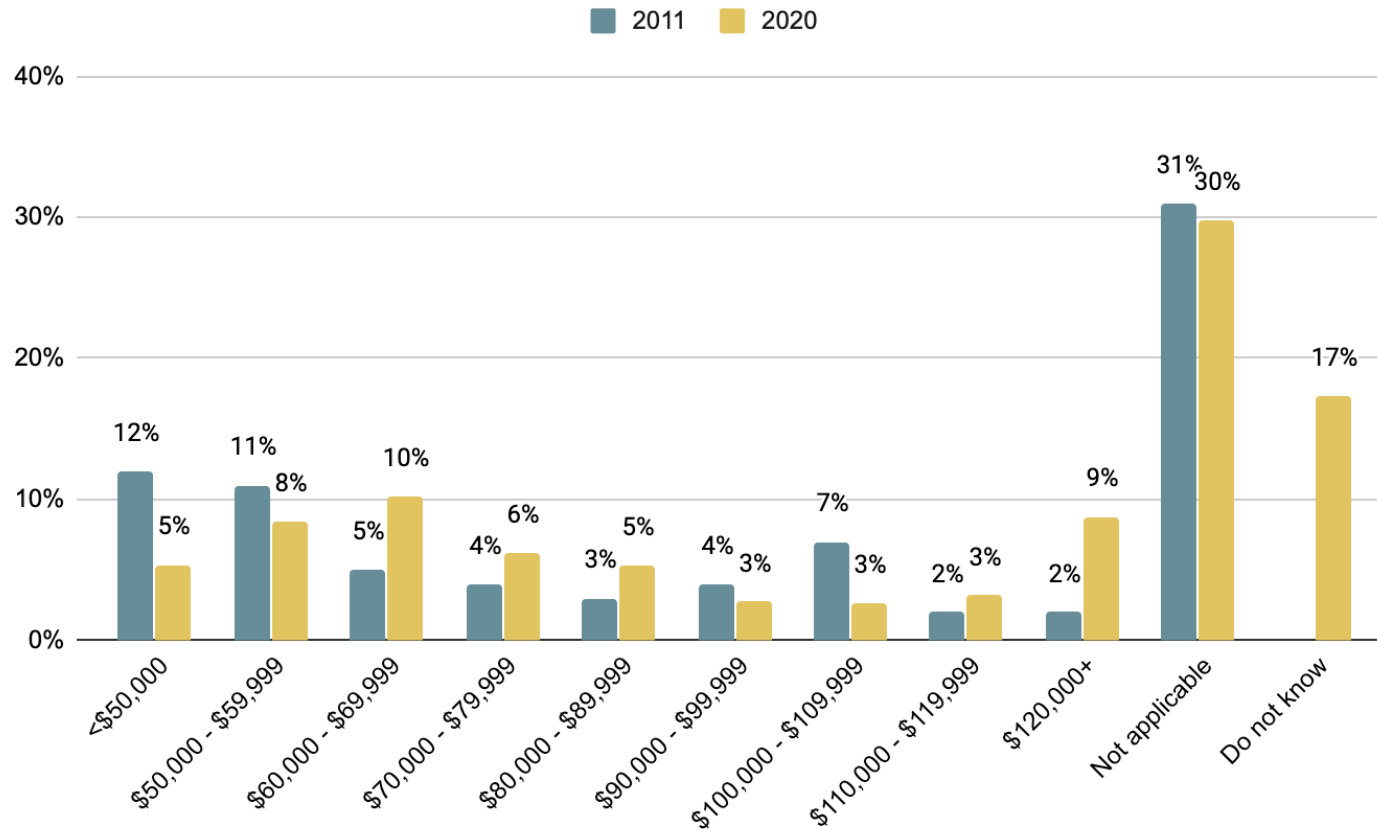
If you charge on an hourly basis, what is your current standard hourly rate?



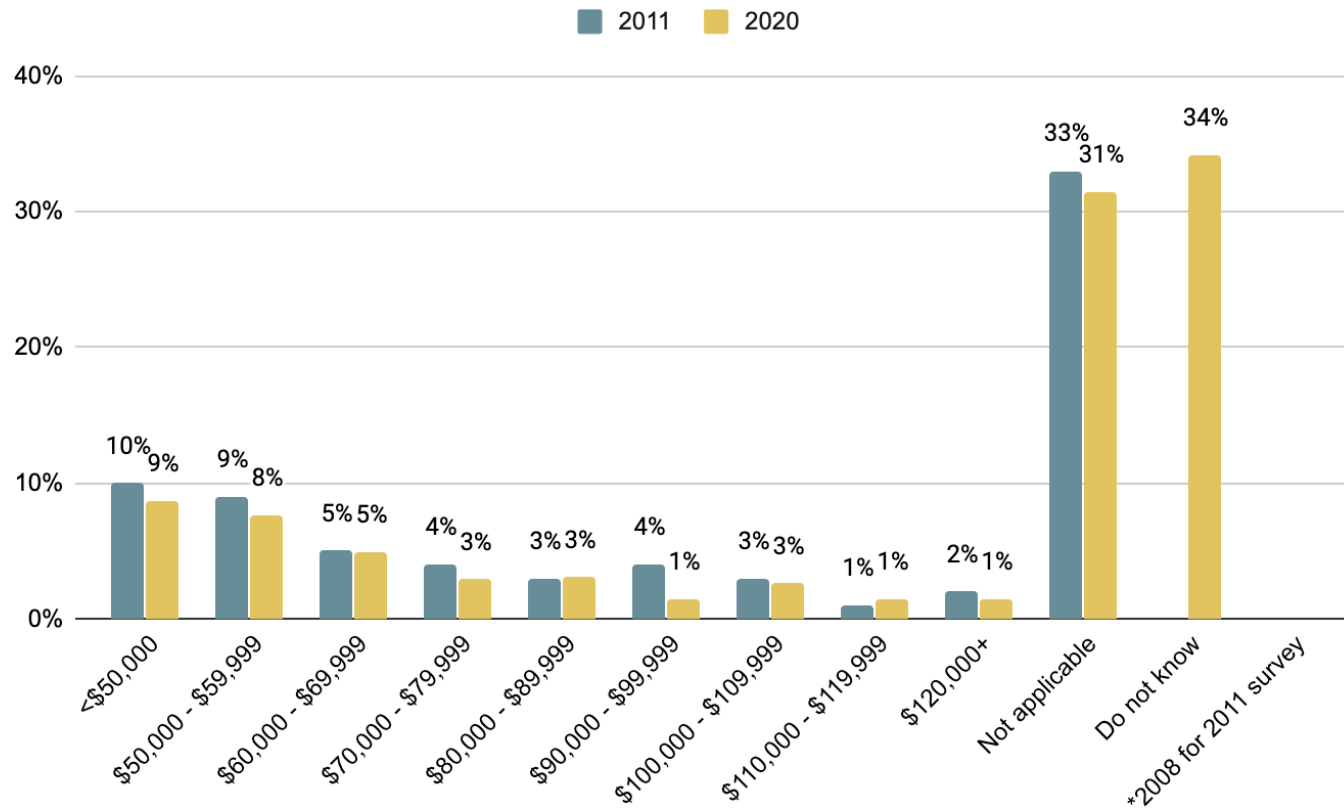
How has your standard hourly billing rate changed over the past two years?



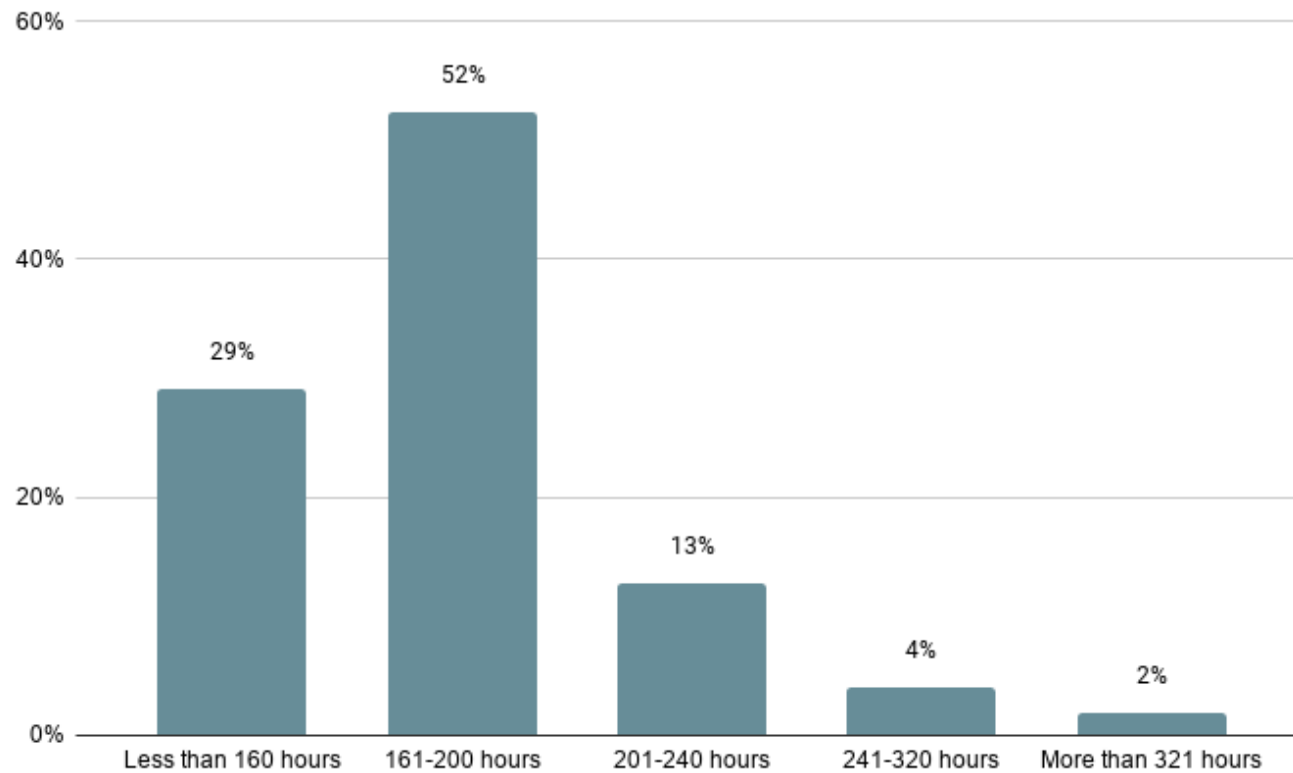
What is the current starting annual salary for lawyers in your law firm or office?



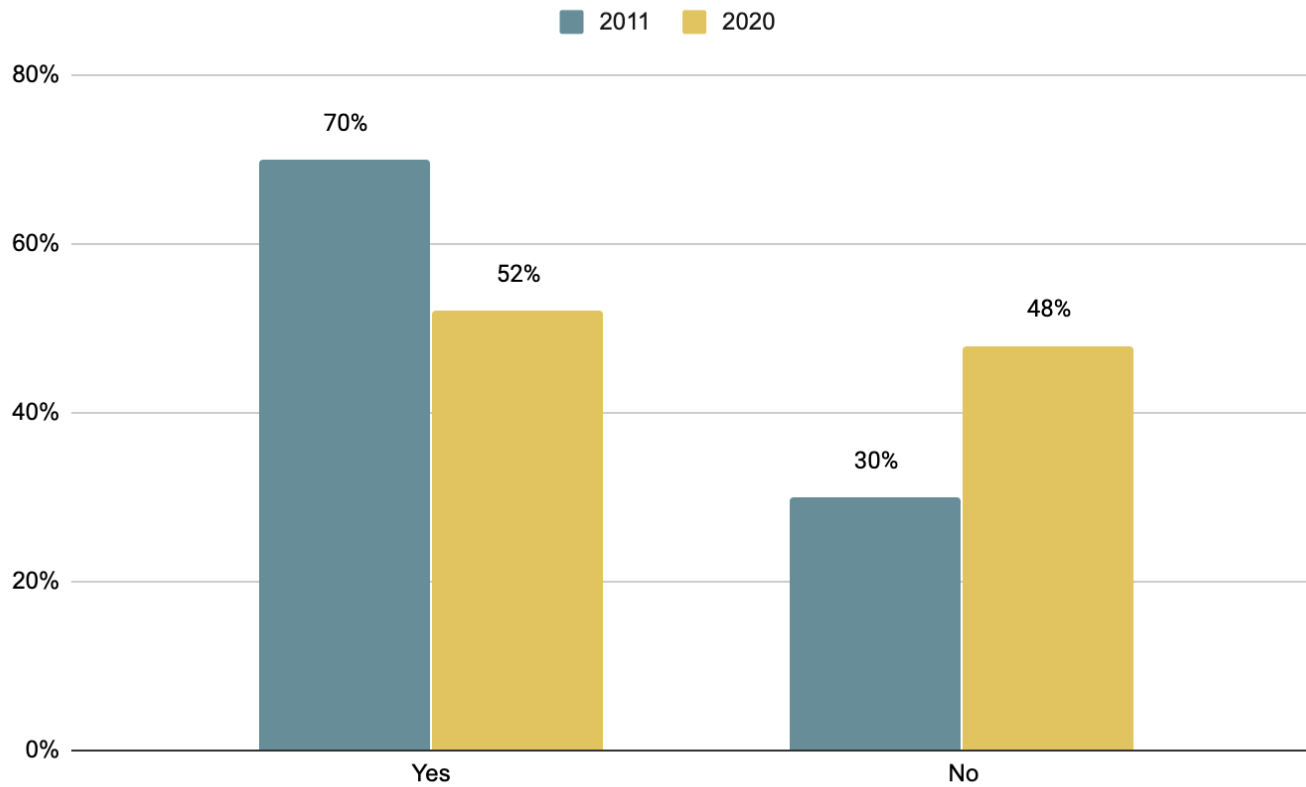
What was the starting annual salary for lawyers in your law firm or office in 2010?



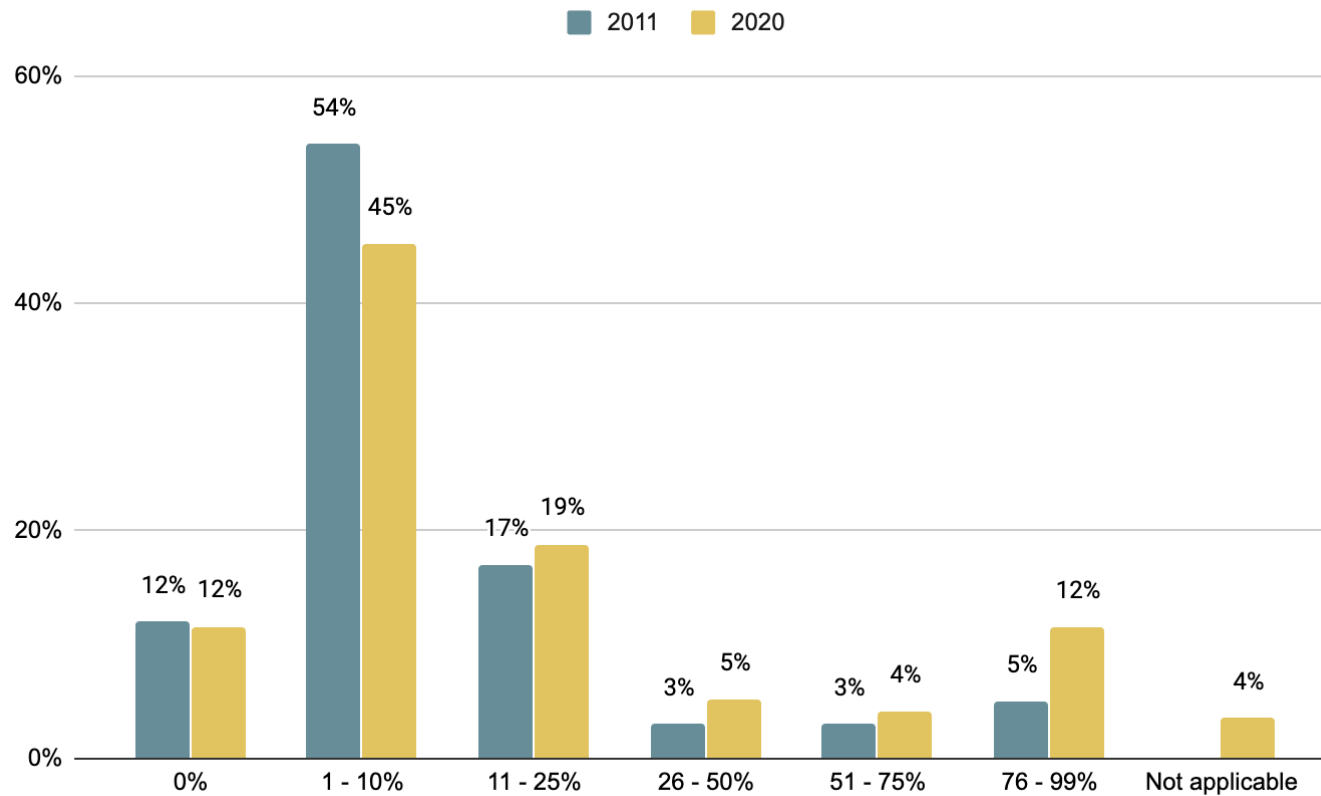
On average, how many hours per month did you work in the past year (including and non-billable hours)?



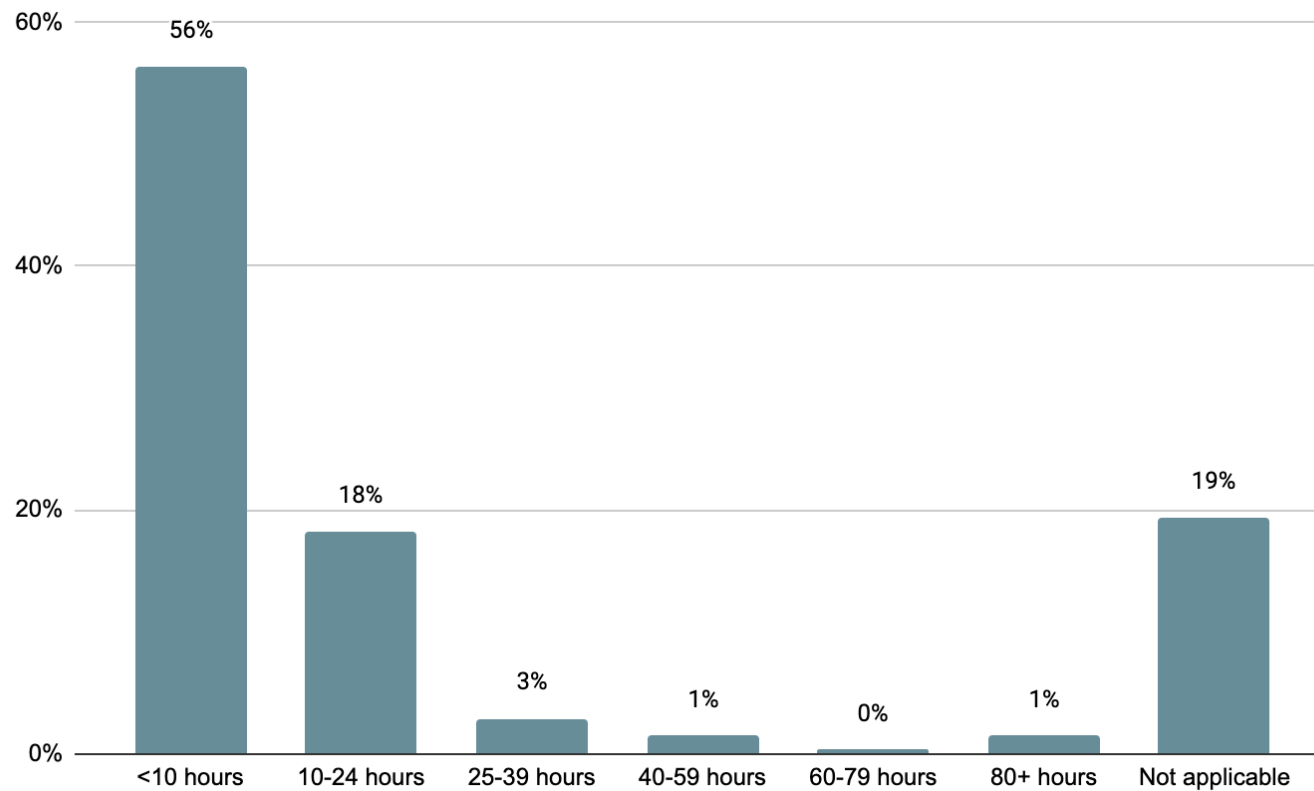
Do you keep track of your hours worked (including billable and non-billable hours as well as non-billable time)?



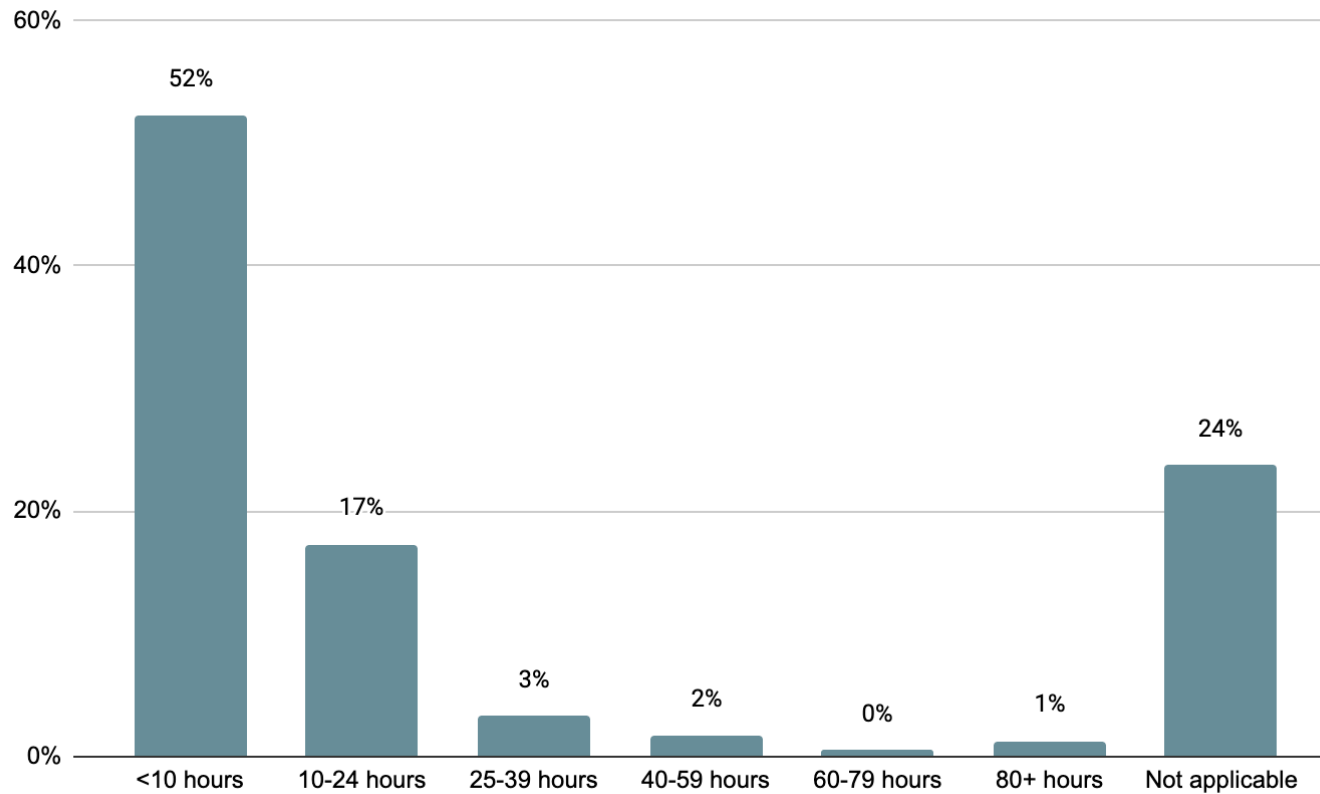
Of your total average hours worked per month, what percentage of your time is spent working from home?



Of your total average hours worked per month, how many hours were pro bono legal services?

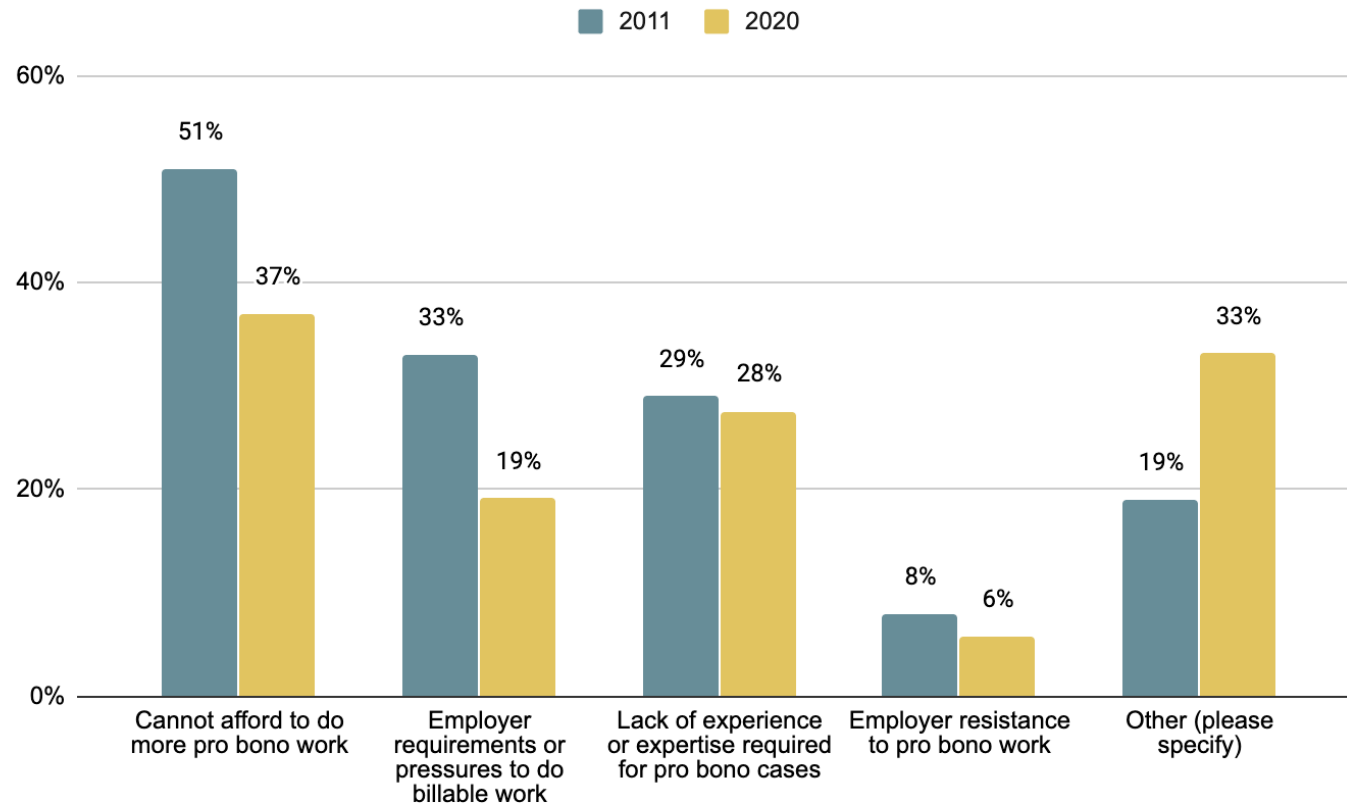


Of your total average hours worked per month, how many hours were volunteer for charitable organizations, churches or other community services?

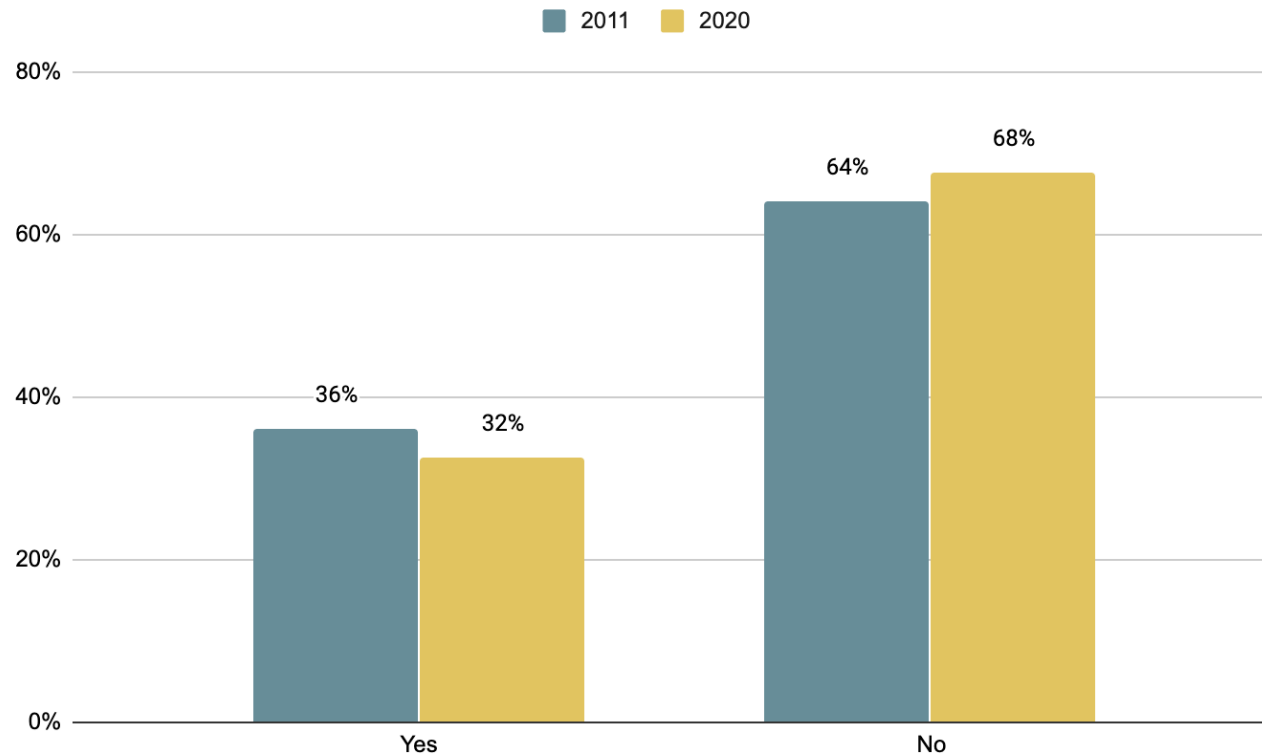


What are the biggest obstacles keeping you from doing more pro bono work?

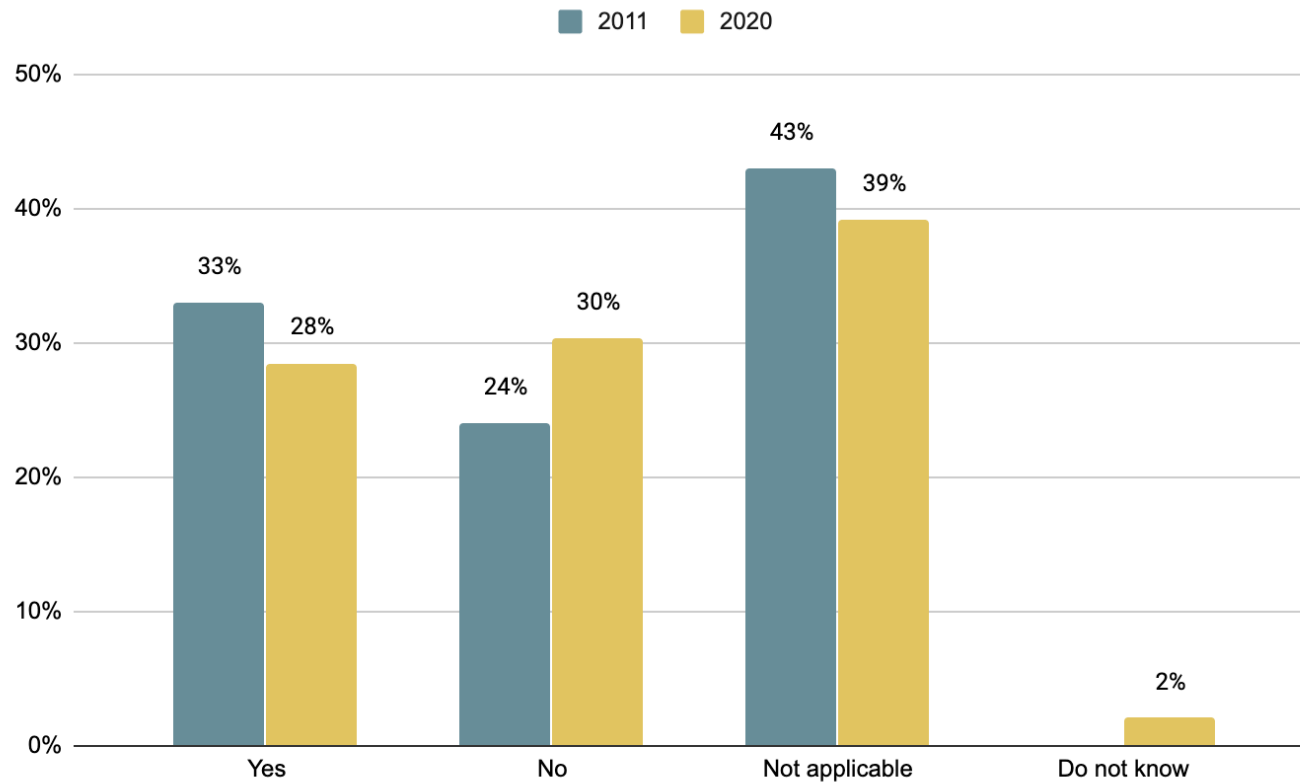
Please select all that apply.



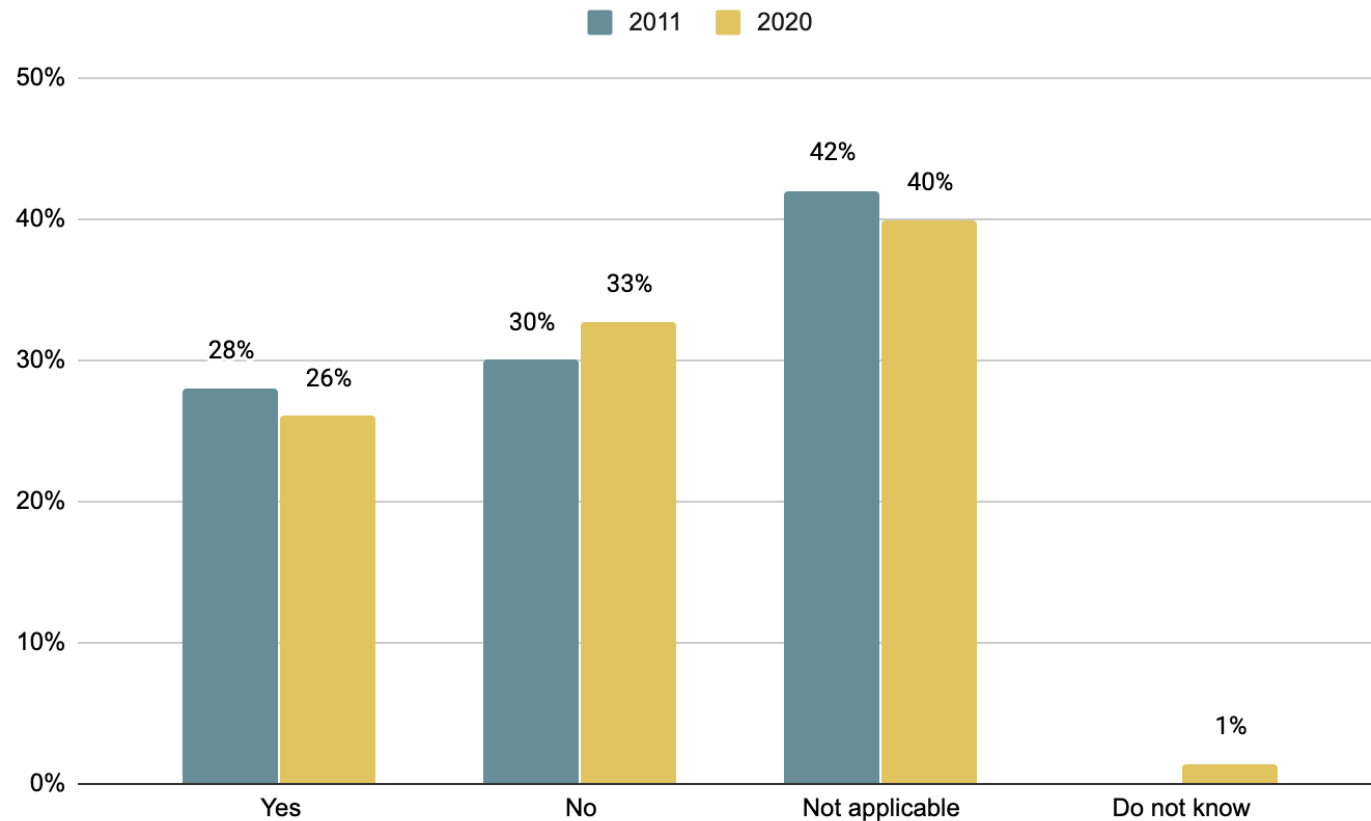
In the last two years, have you made a donation to And Justice For All, or to another organization supporting legal representation to the underserved?



Other than for plaintiff personal injury work, have clients ASKED you in the past two years to handle a litigation matter on a fee arrangement other than straight hourly?

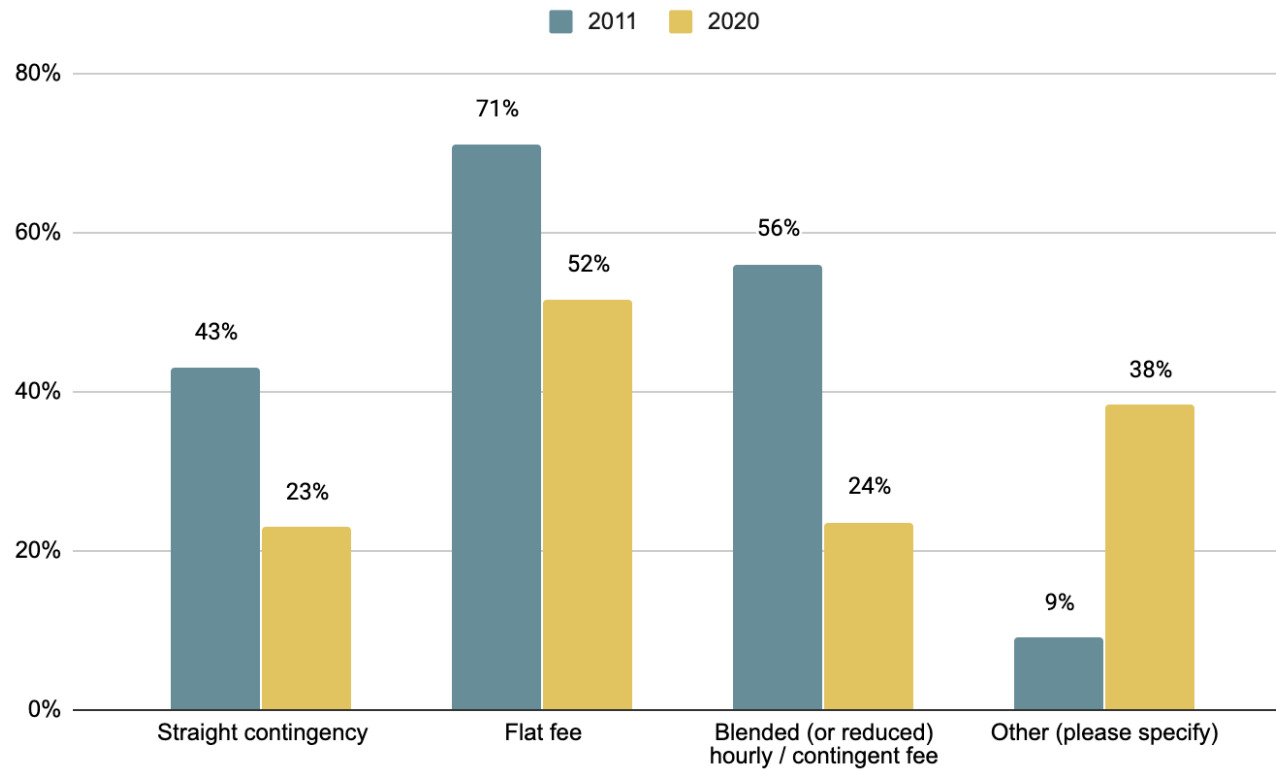


Other than for plaintiff personal injury work, have you OFFERED OR ACCEPTED litigation matters in the past two years on a fee arrangement other than straight hourly?

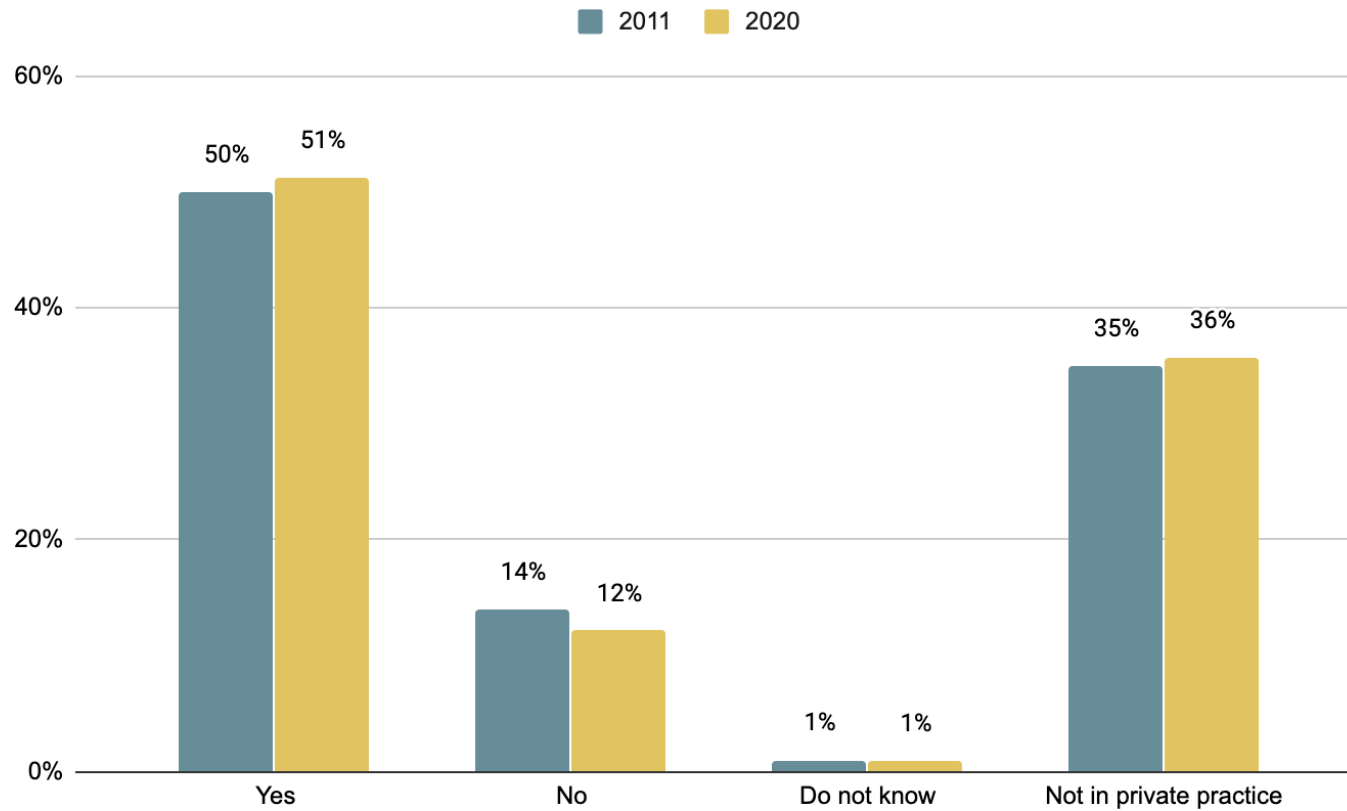


Identify the billing arrangements you have agreed to in the past two years.

Please select all that apply.

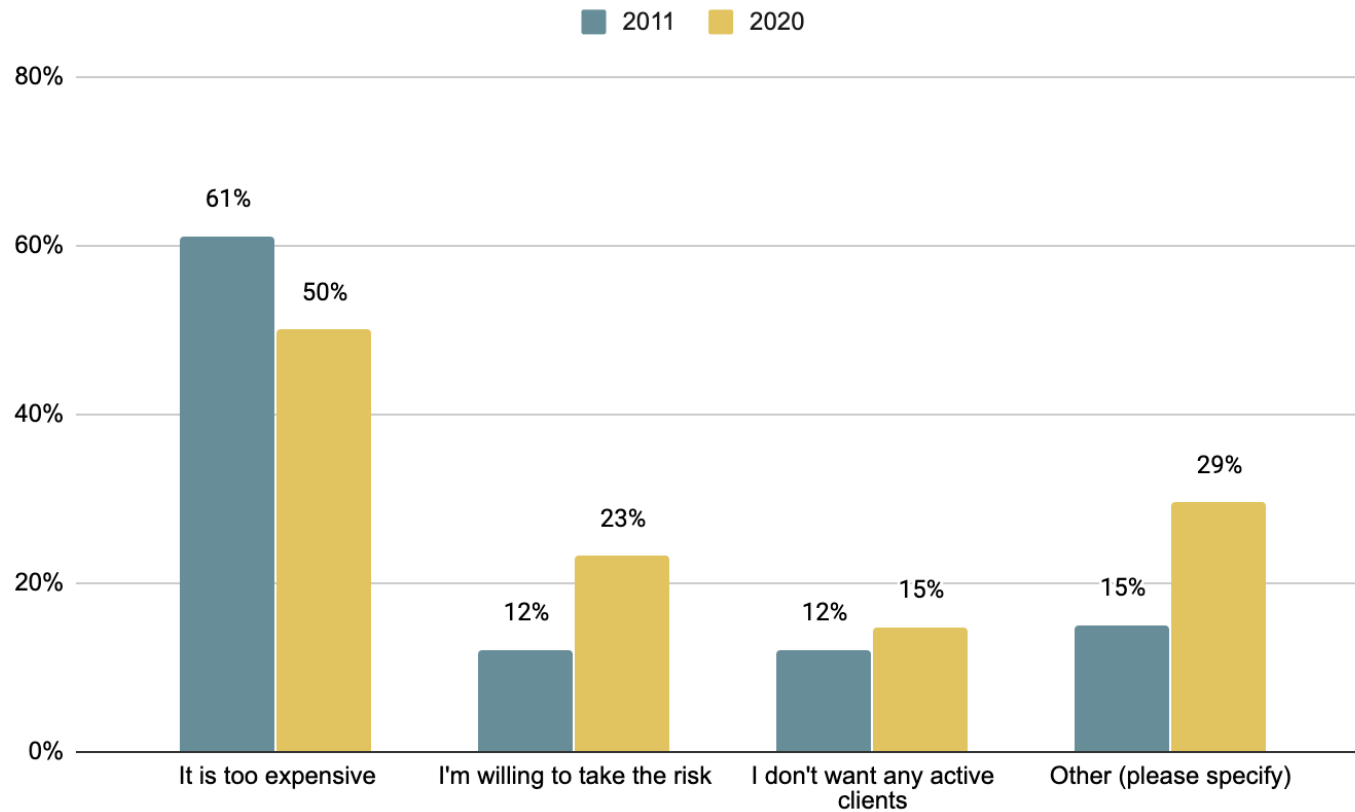


If you are in private practice, do you have professional liability insurance?



What is the primary reason why you do not have professional liability insurance?

Please select all that apply.




Job Satisfaction & Expectations



More than half of survey respondents say it's very likely they will stay in the legal profession until retirement.

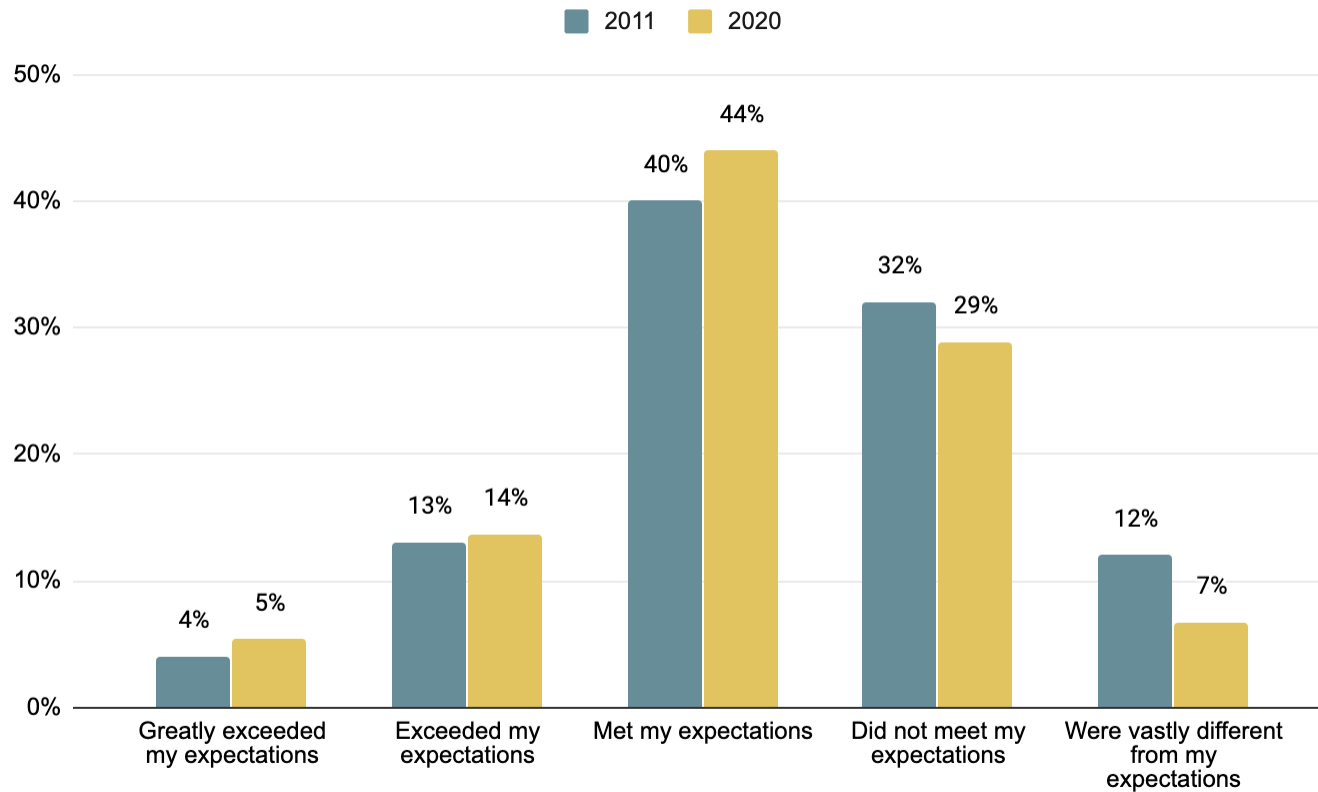
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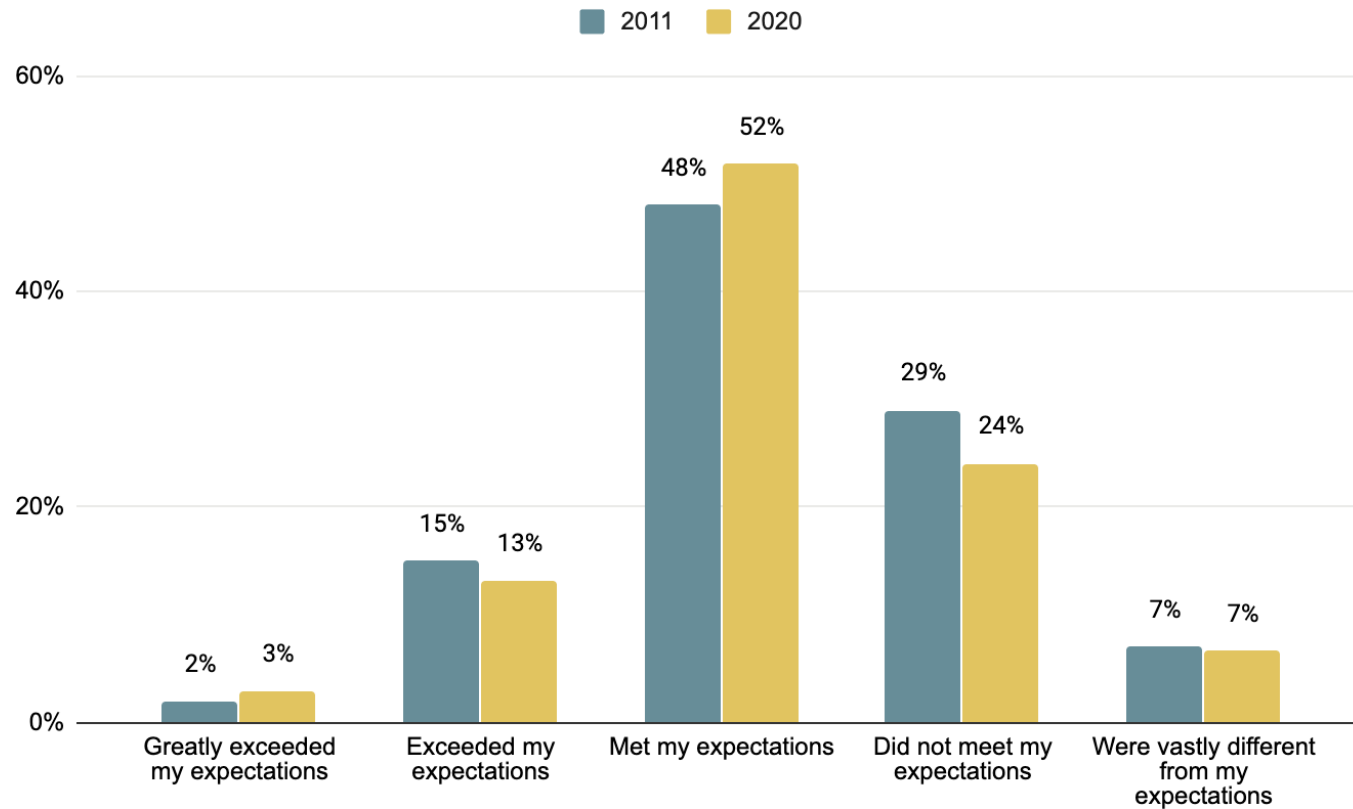
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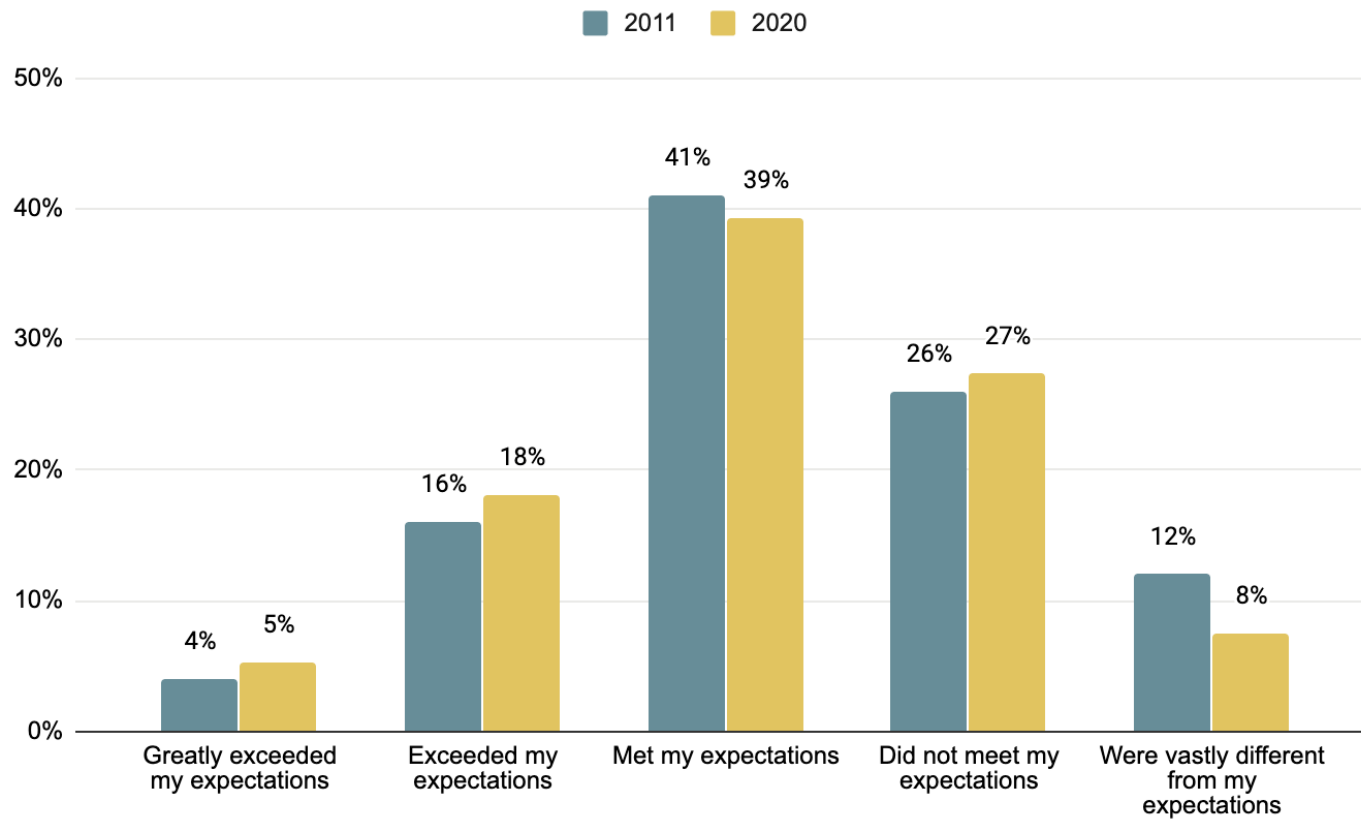
How has your income as a lawyer been when compared to your expectations upon beginning your career?



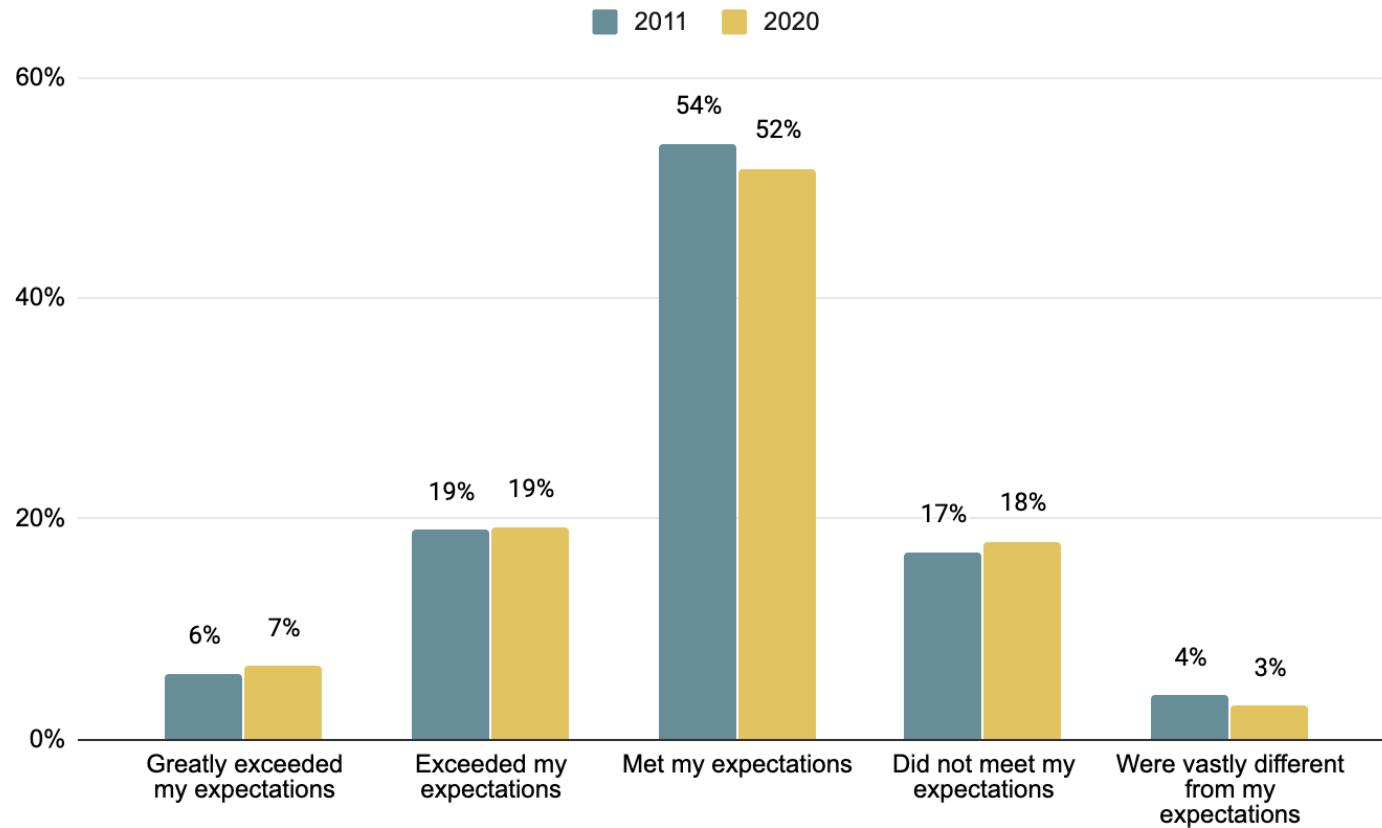
How has your work/life balance as a lawyer been when compared to your expectations upon beginning your career?



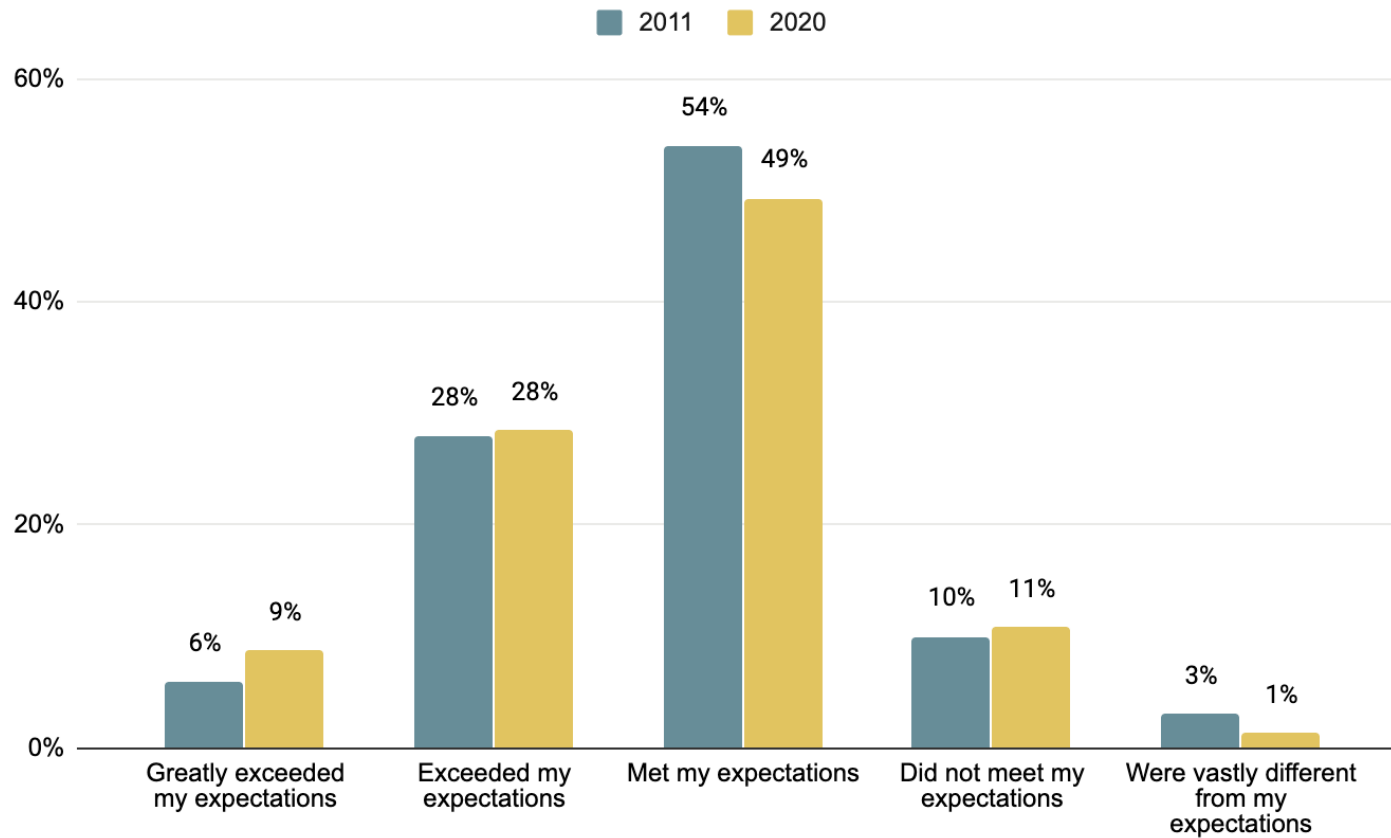
How have the career opportunities as a lawyer been when compared to your expectations upon beginning your career?



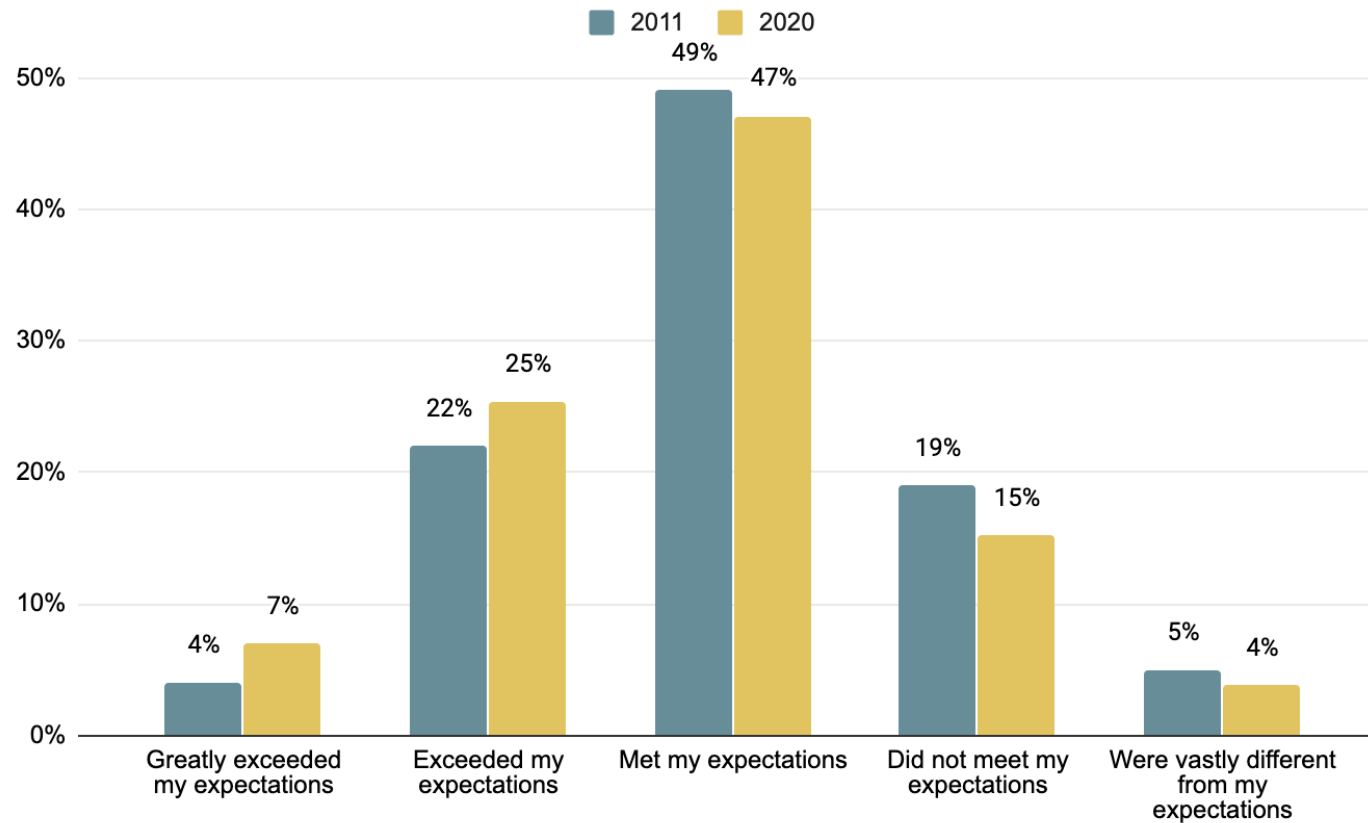
How has helping others / Public Service as a lawyer been when compared to your expectations upon beginning your career?



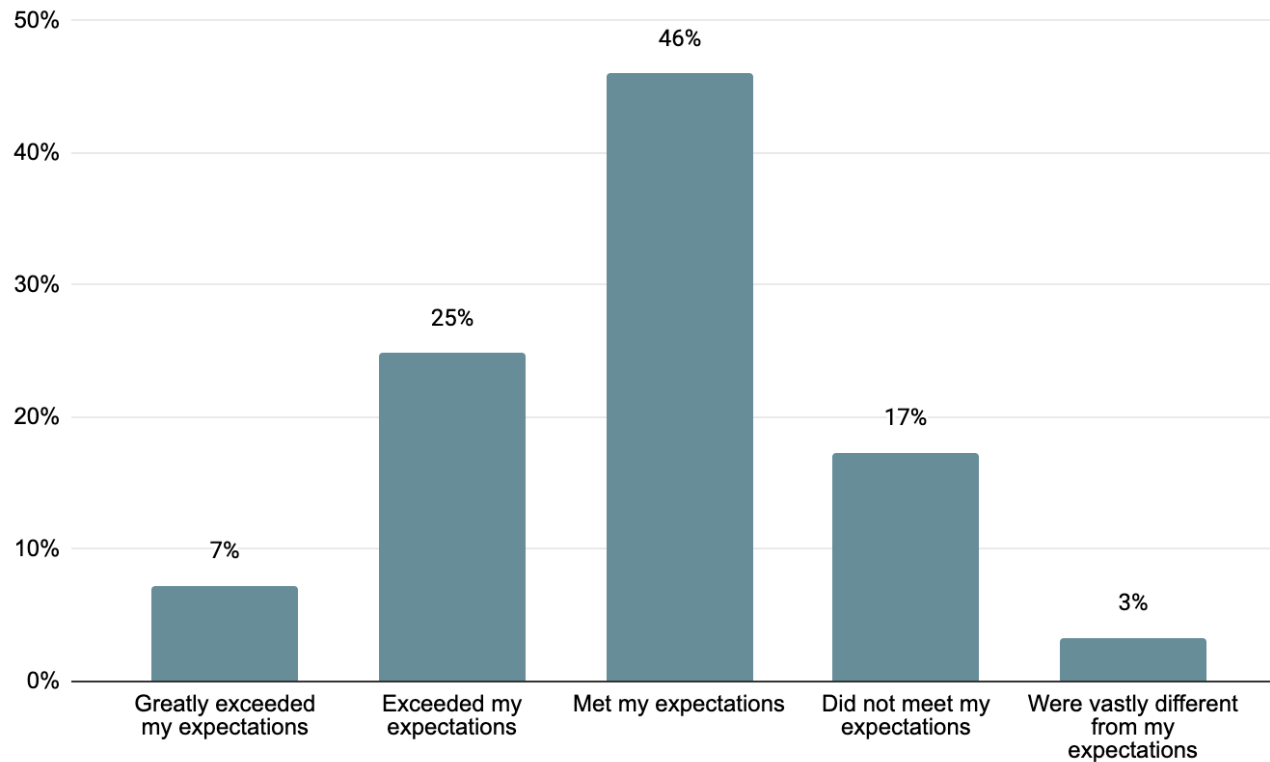
How has the opportunities for learning as a lawyer been when compared to your expectations upon beginning your career?



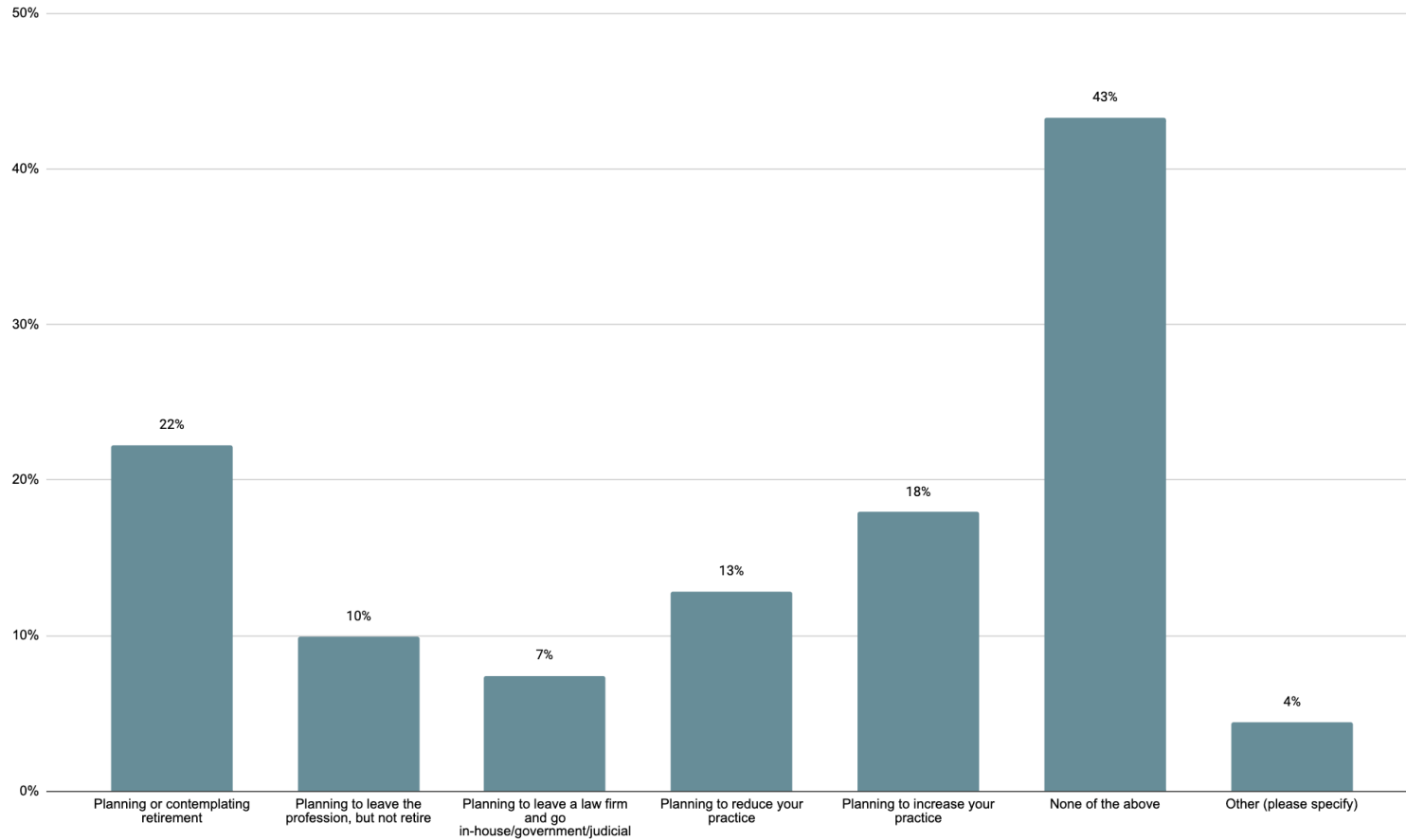
How have your professional relationships as a lawyer been when compared to your expectations upon beginning your career?



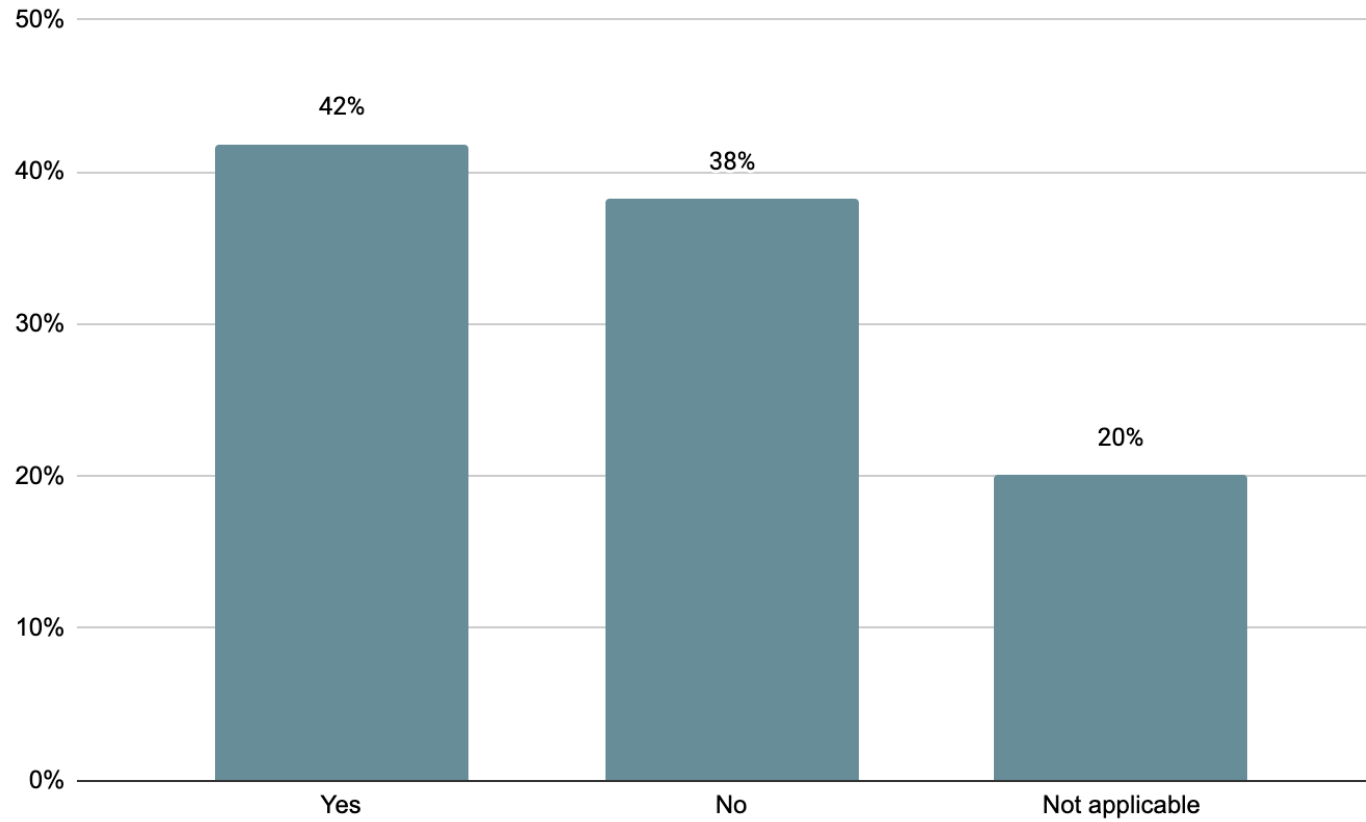
How have your professional relationships as a lawyer been when compared to your expectations upon beginning your career?



During the next five years are you planning on any of the following? Please select all that apply.

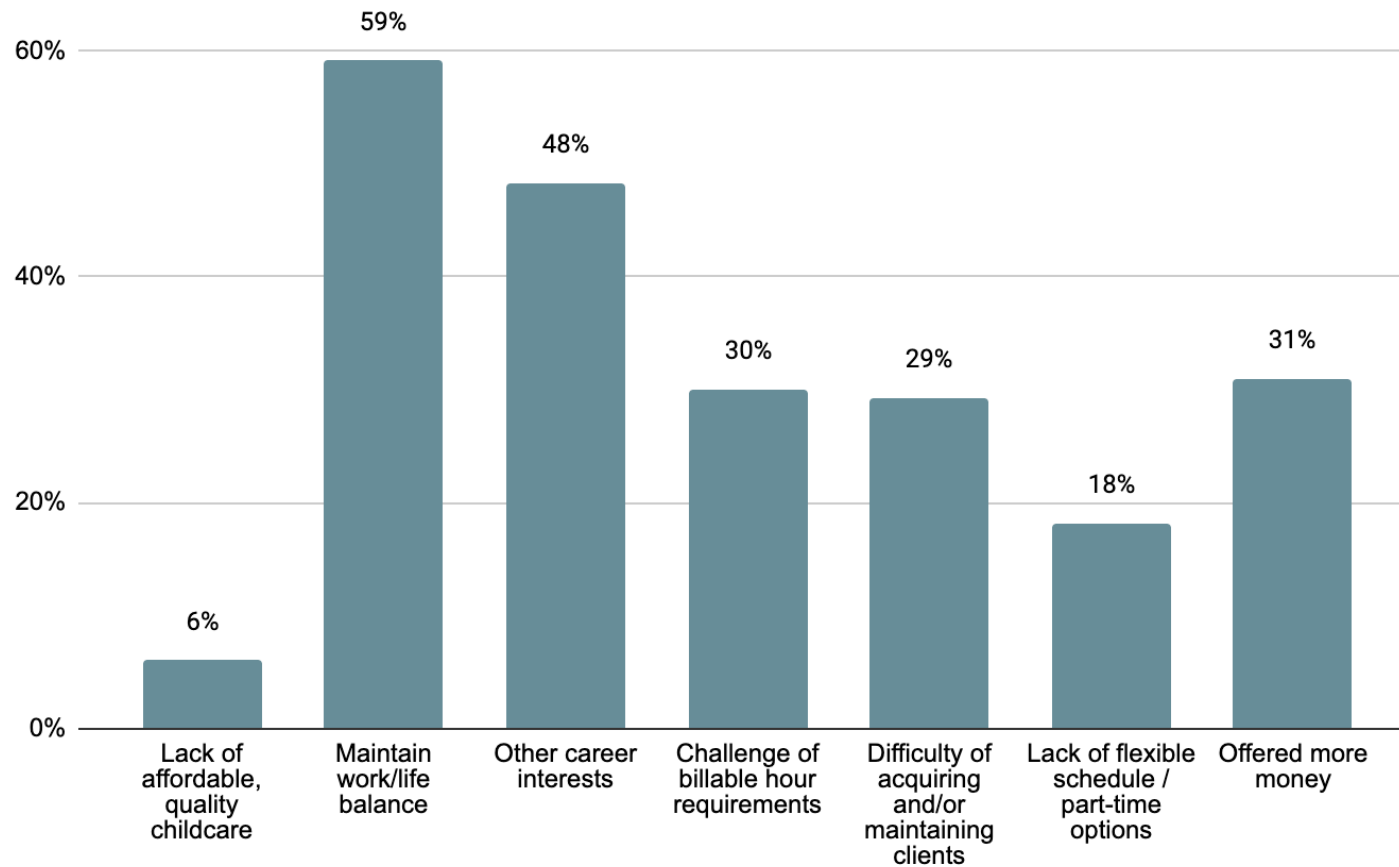


Have you left or considered leaving a law firm in the past five years?

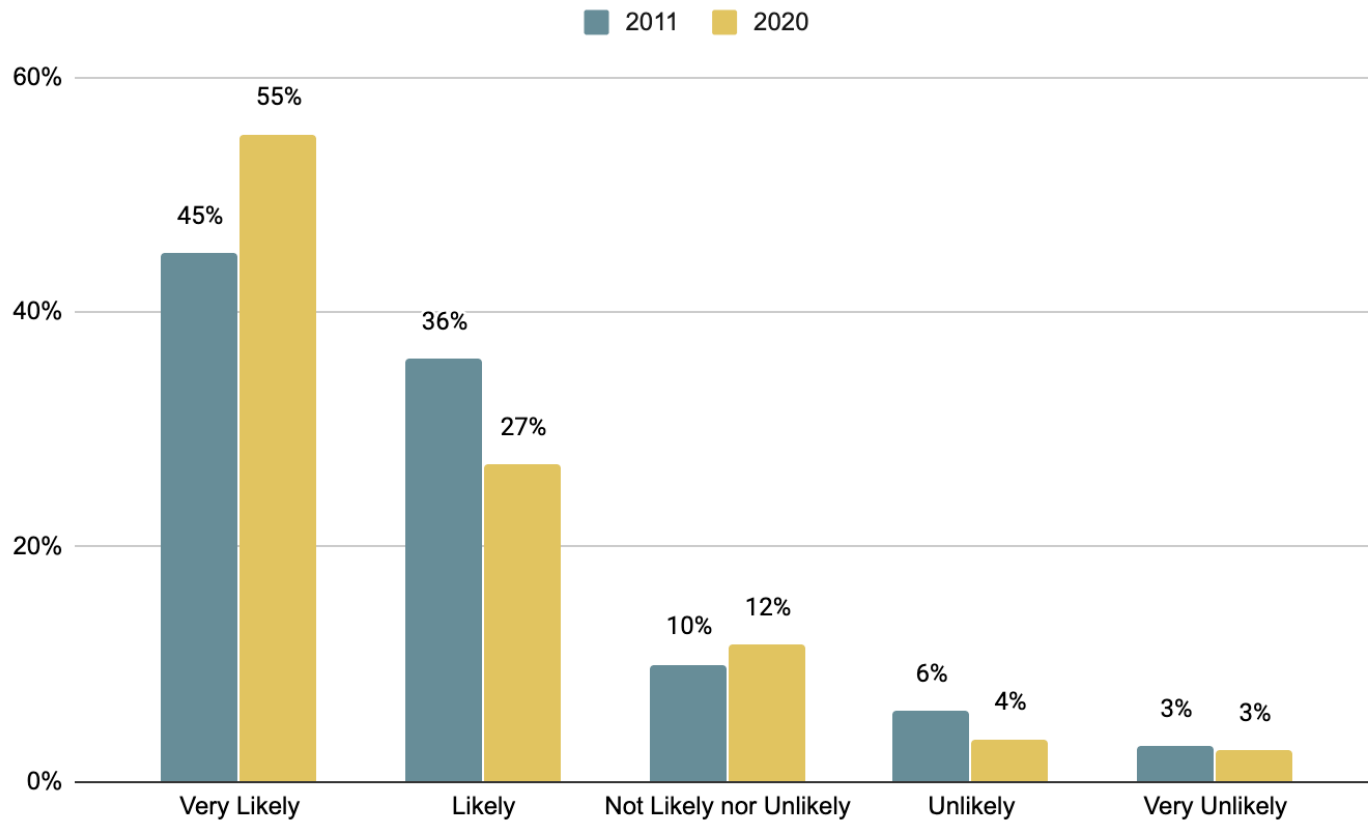


If you have considered a different type of practice, was it due to:

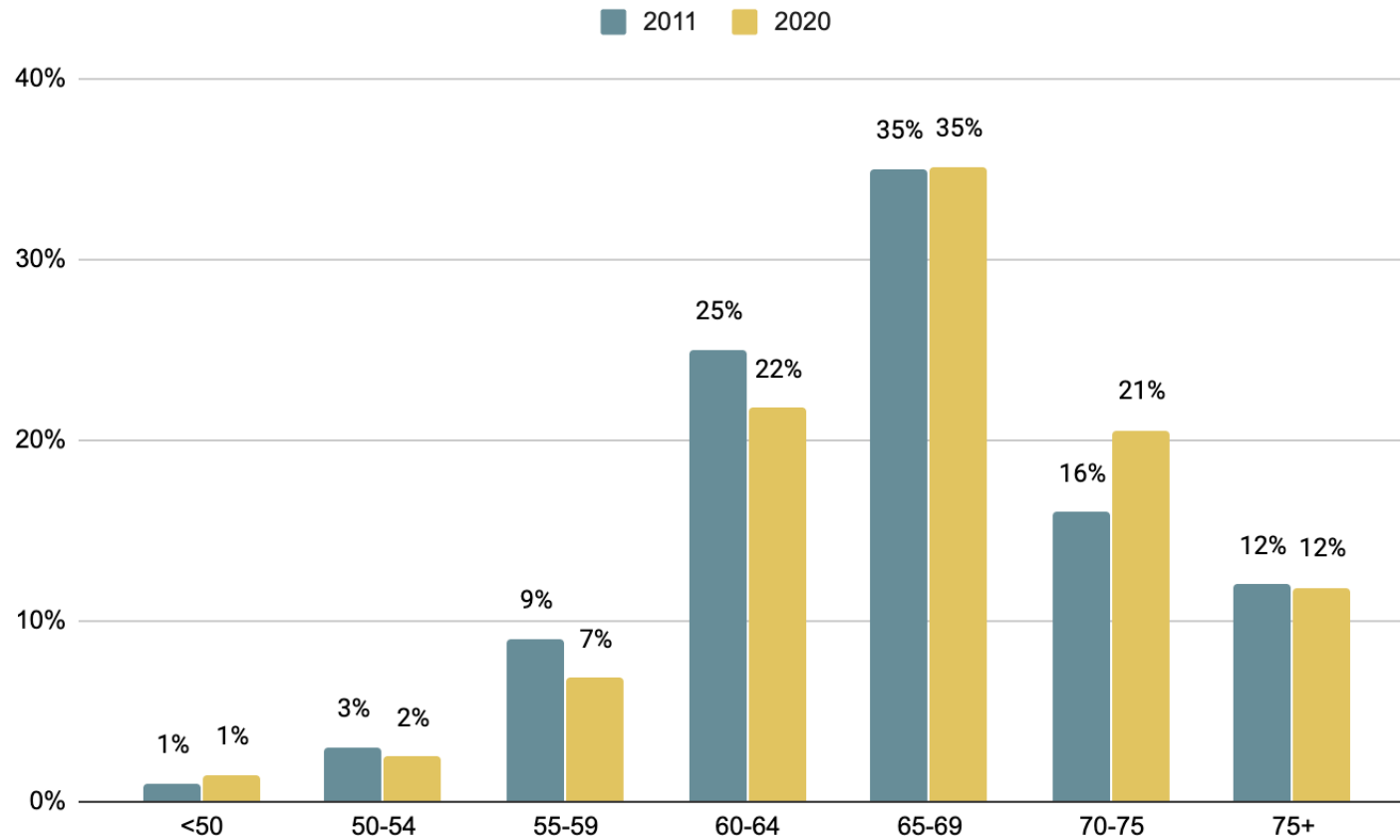
Please select all that apply.



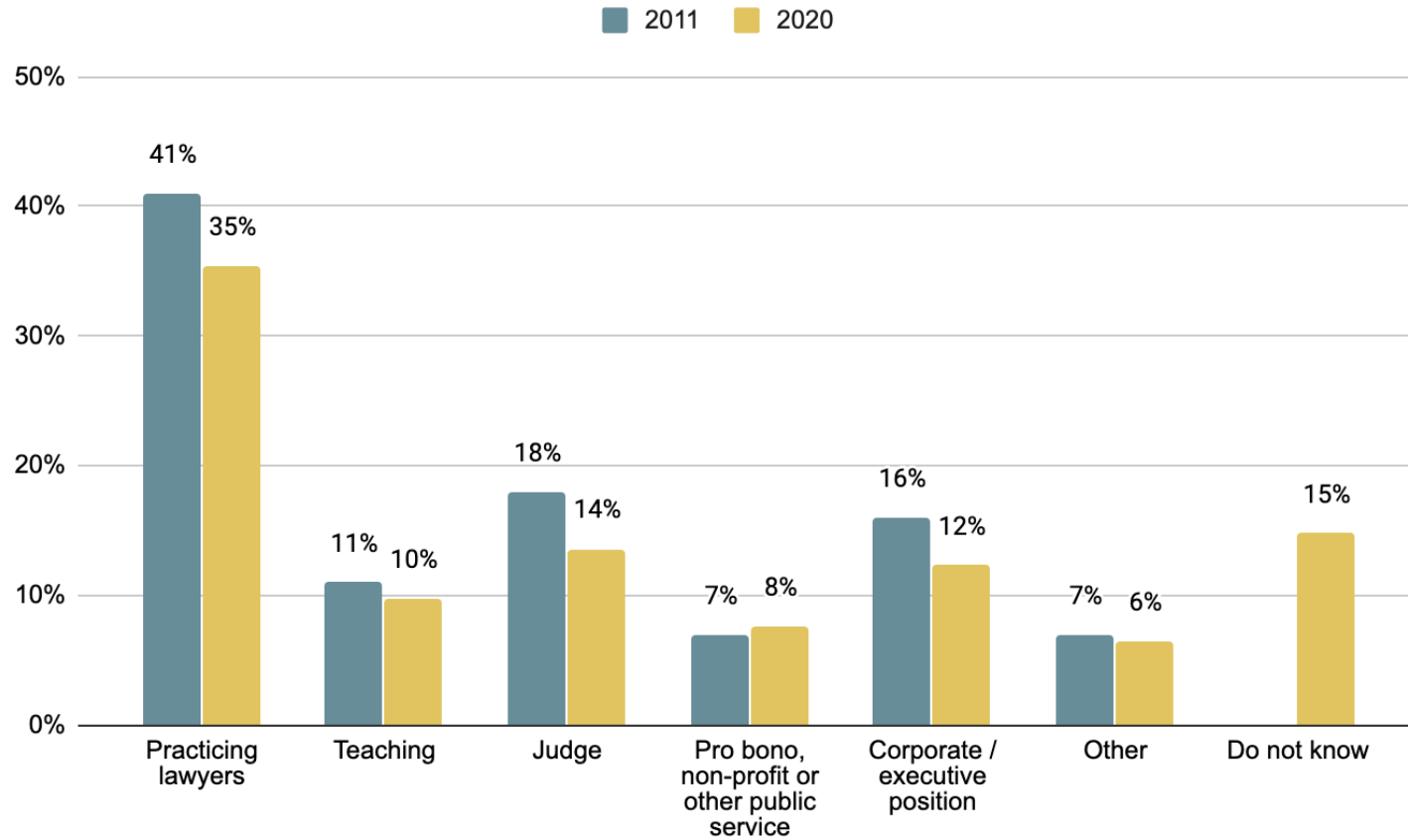
How likely is it that you will stay in the legal profession until your retirement?



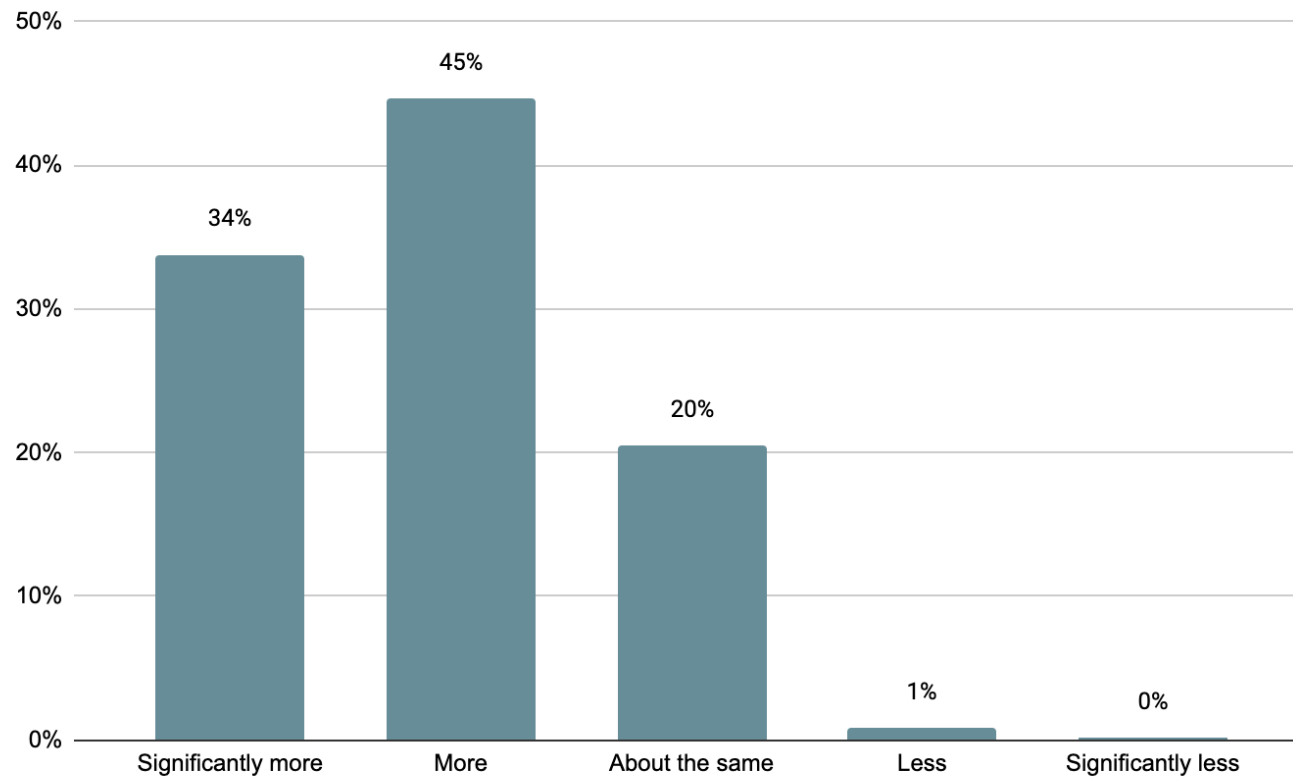
At what age do you plan to retire?



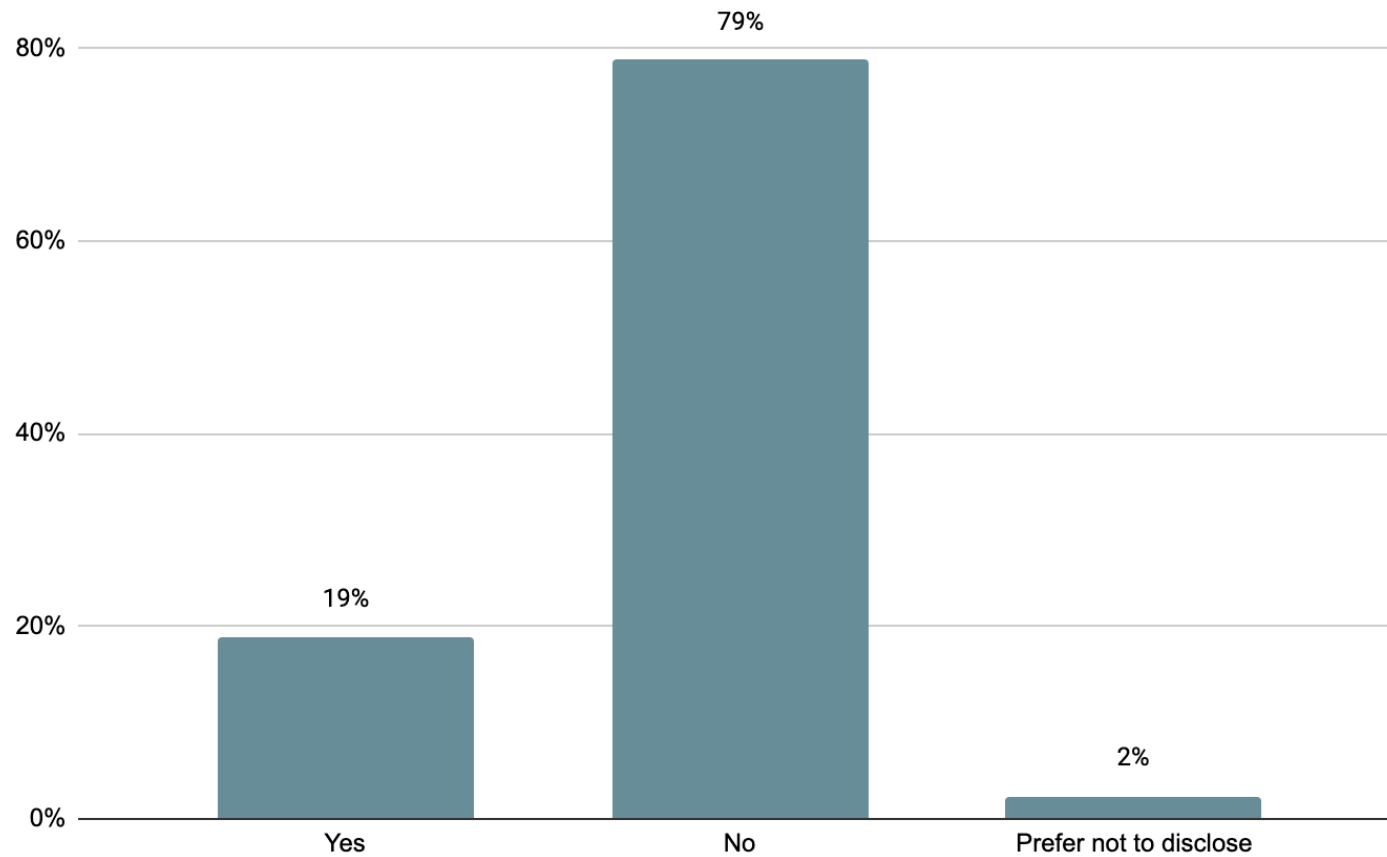
In what role would you choose to end your career?



As compared to other highly educated or trained individuals who have responsibility for others' safety, financial, medical, or legal welfare, do you believe lawyers are more or less likely to have work-related stress?

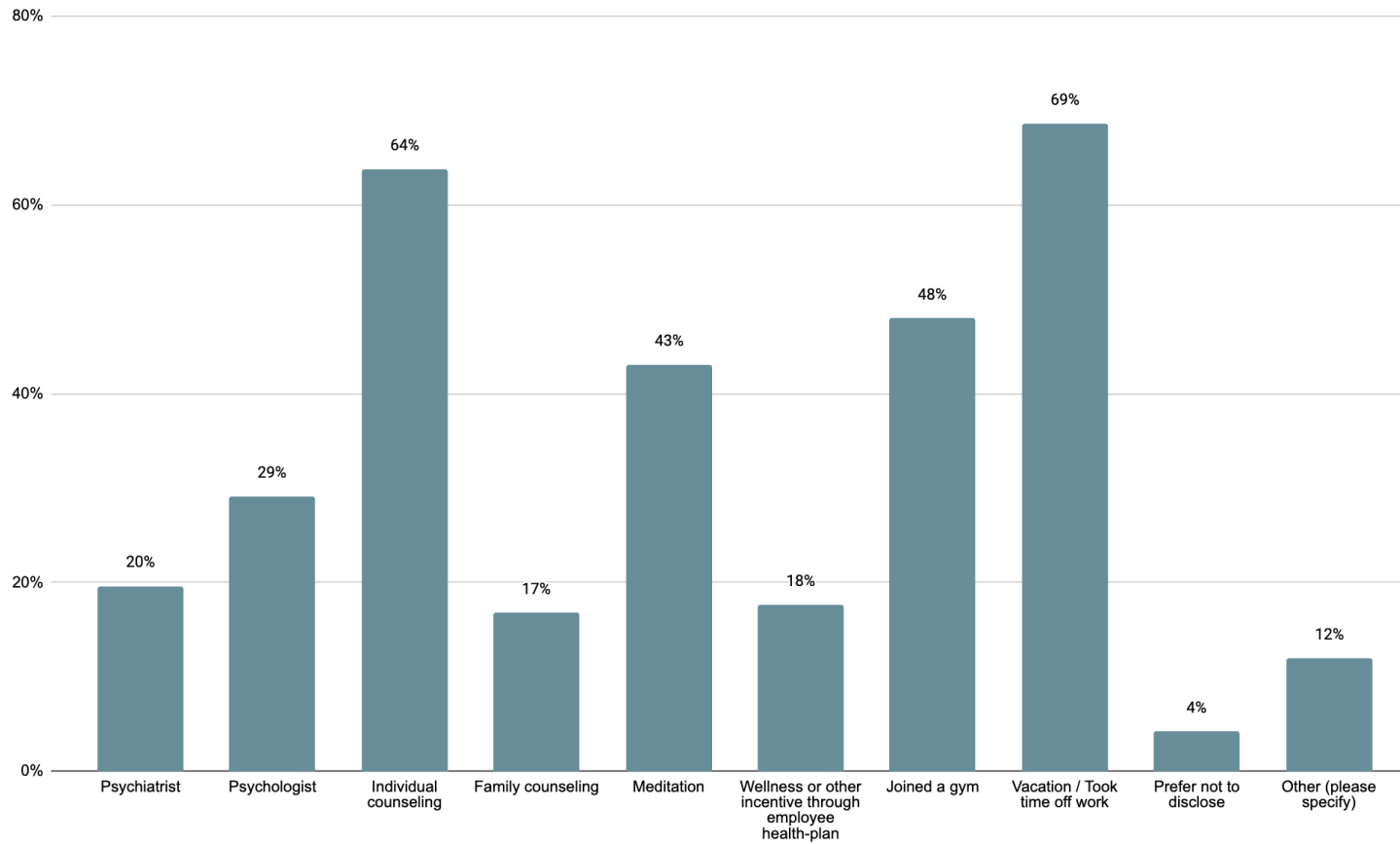


In the past two years have you sought out services for work-related stress?



What type of services have you tried?

Please select all the apply.



Utah State Bar



More than half of survey respondents read the Utah Bar Journal monthly.

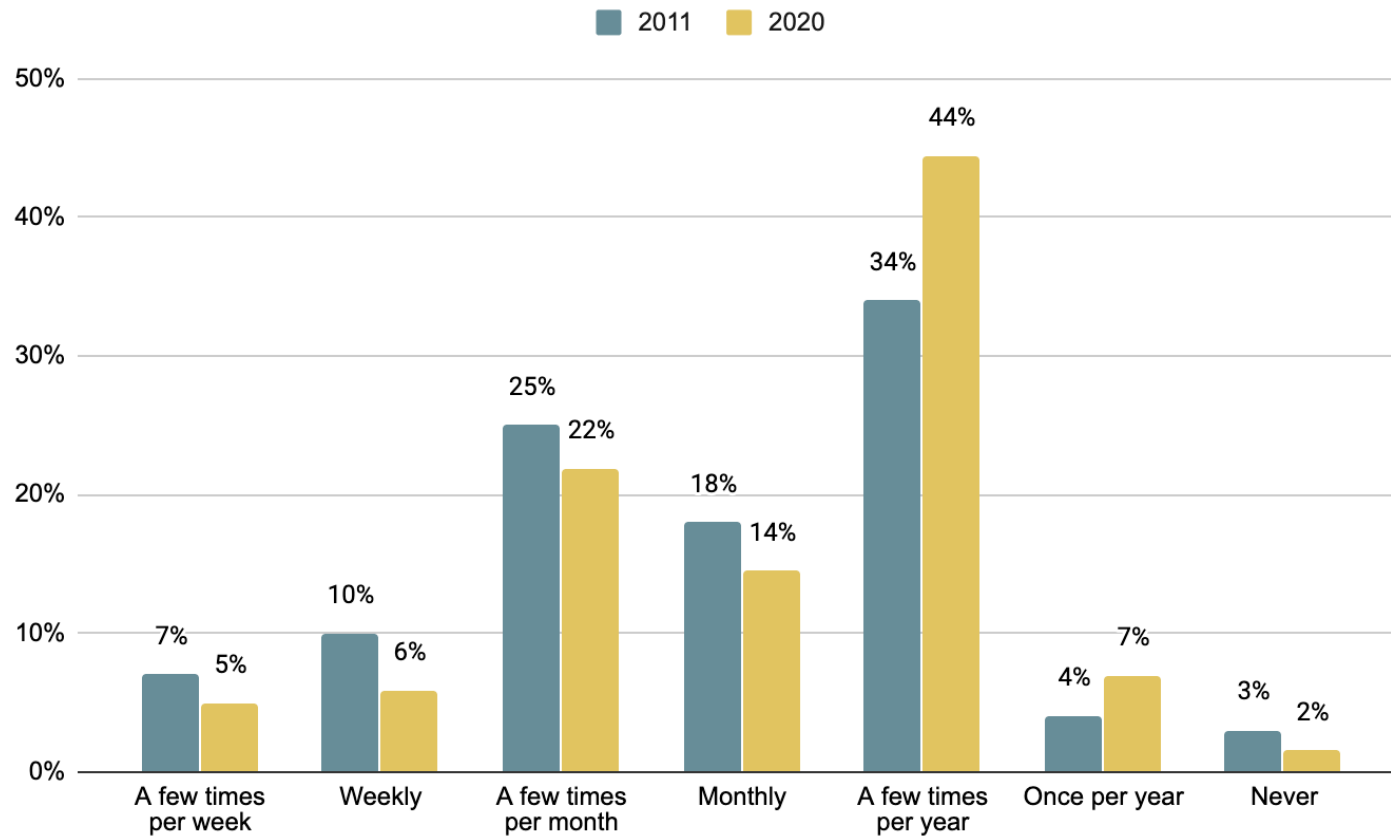
52% of survey respondents read the Utah Bar Journal each month.



96% of survey respondents receive the printed version of the Utah Bar Journal.

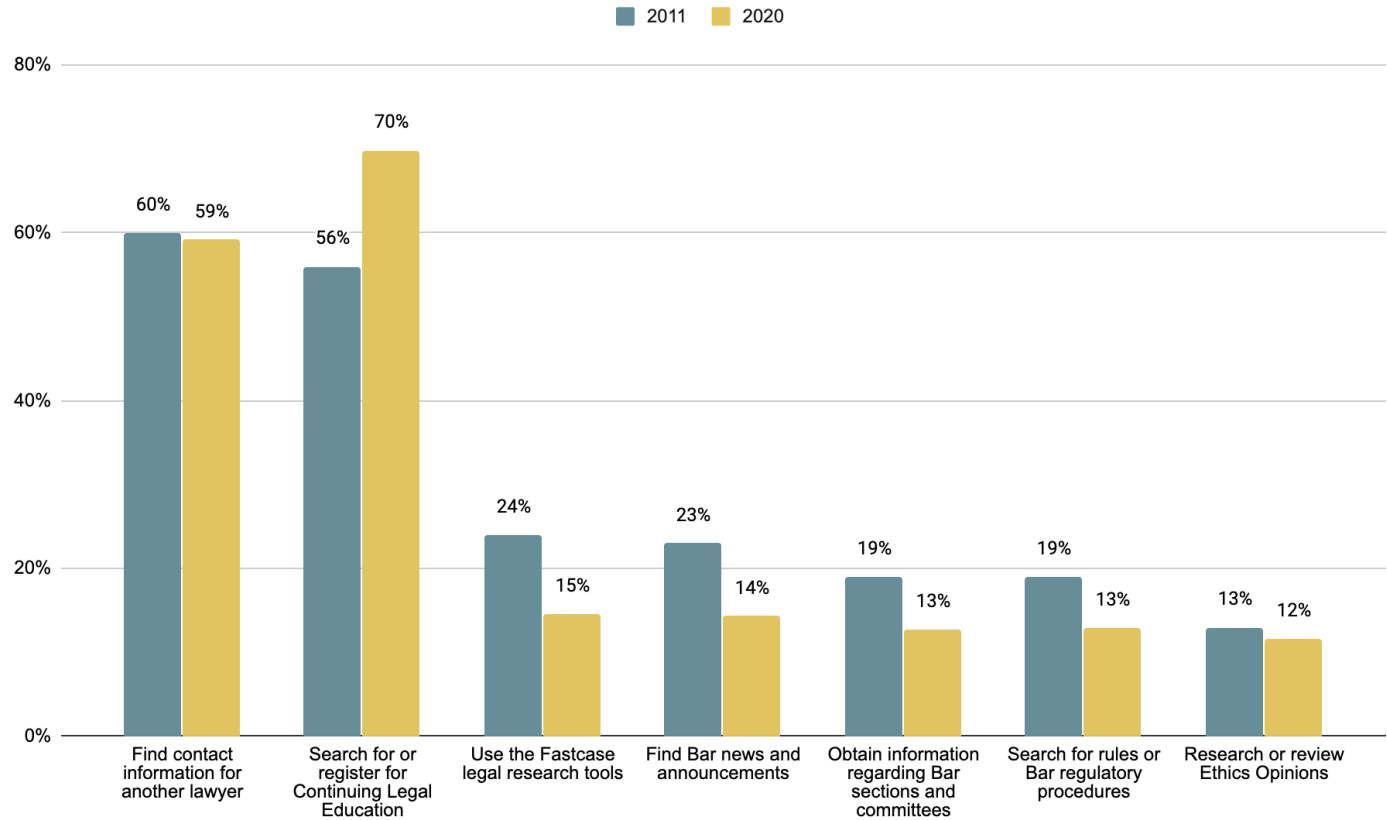
Only 4% receive the Utah Bar Journal digitally.

Which of the following best describes how often you have visited the Bar's website (UtahBar.org) in the last year?



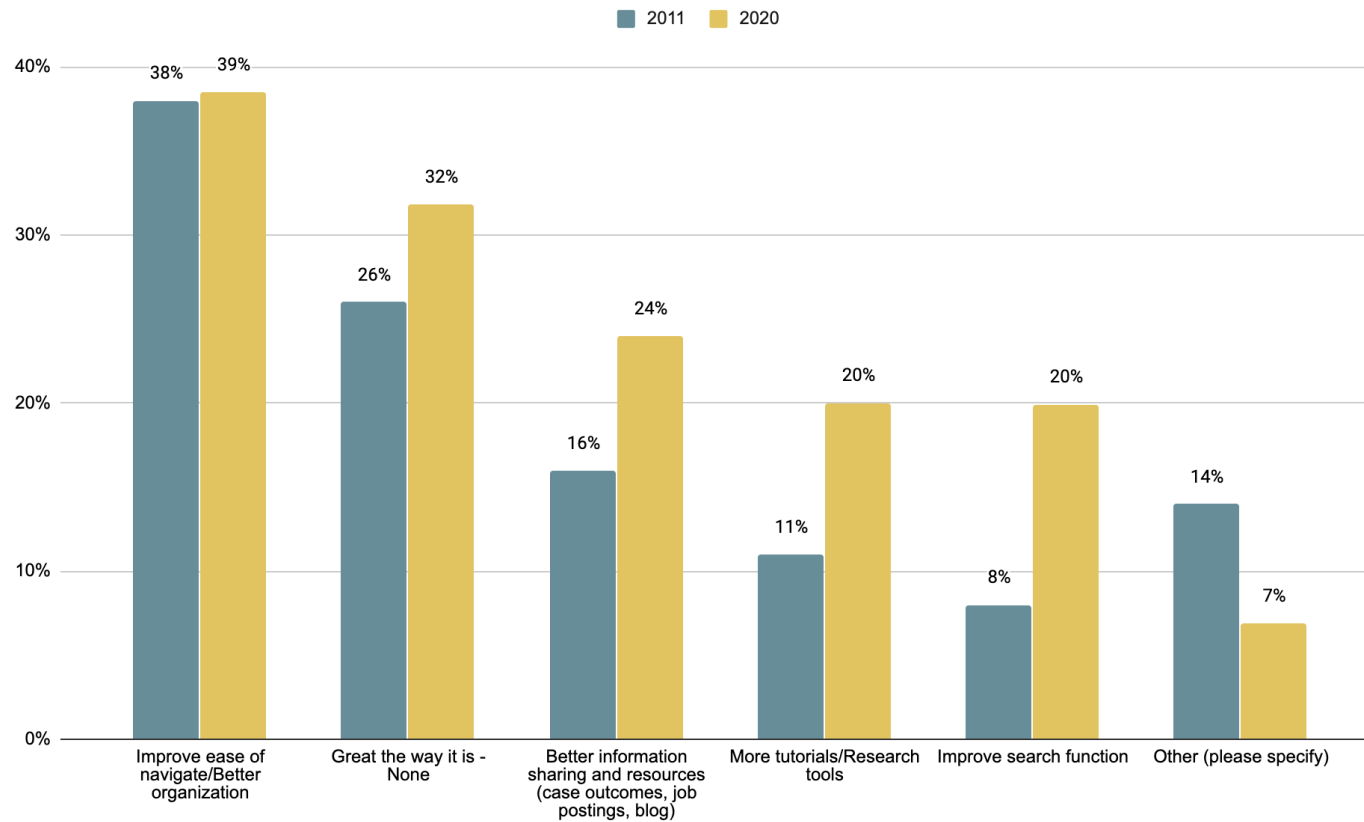
What are the primary reasons you visit the Bar’s website (UtahBar.org)?

Please select all that apply.

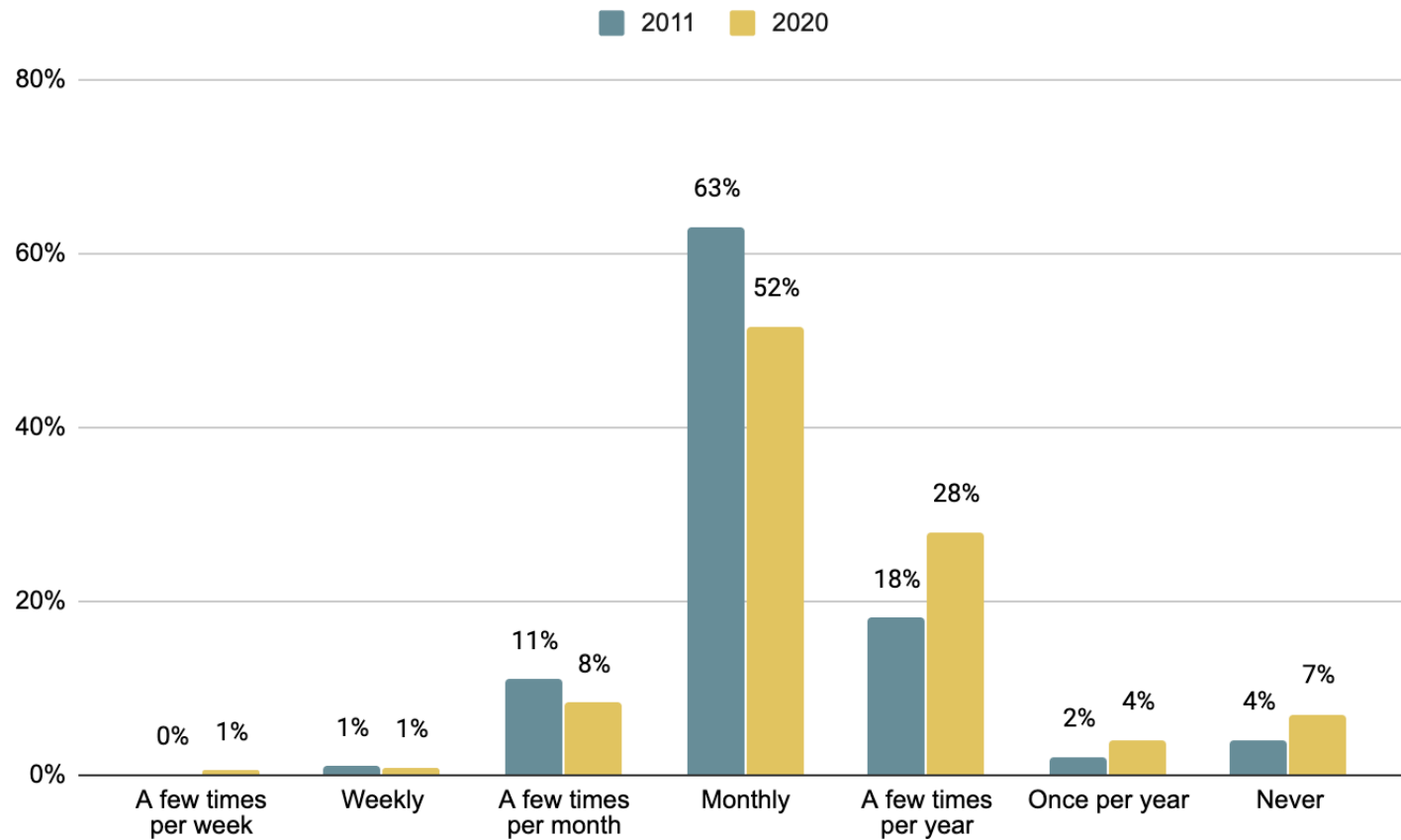


What improvements or services would you like to see added to the Bar's website?

Please select all that apply.

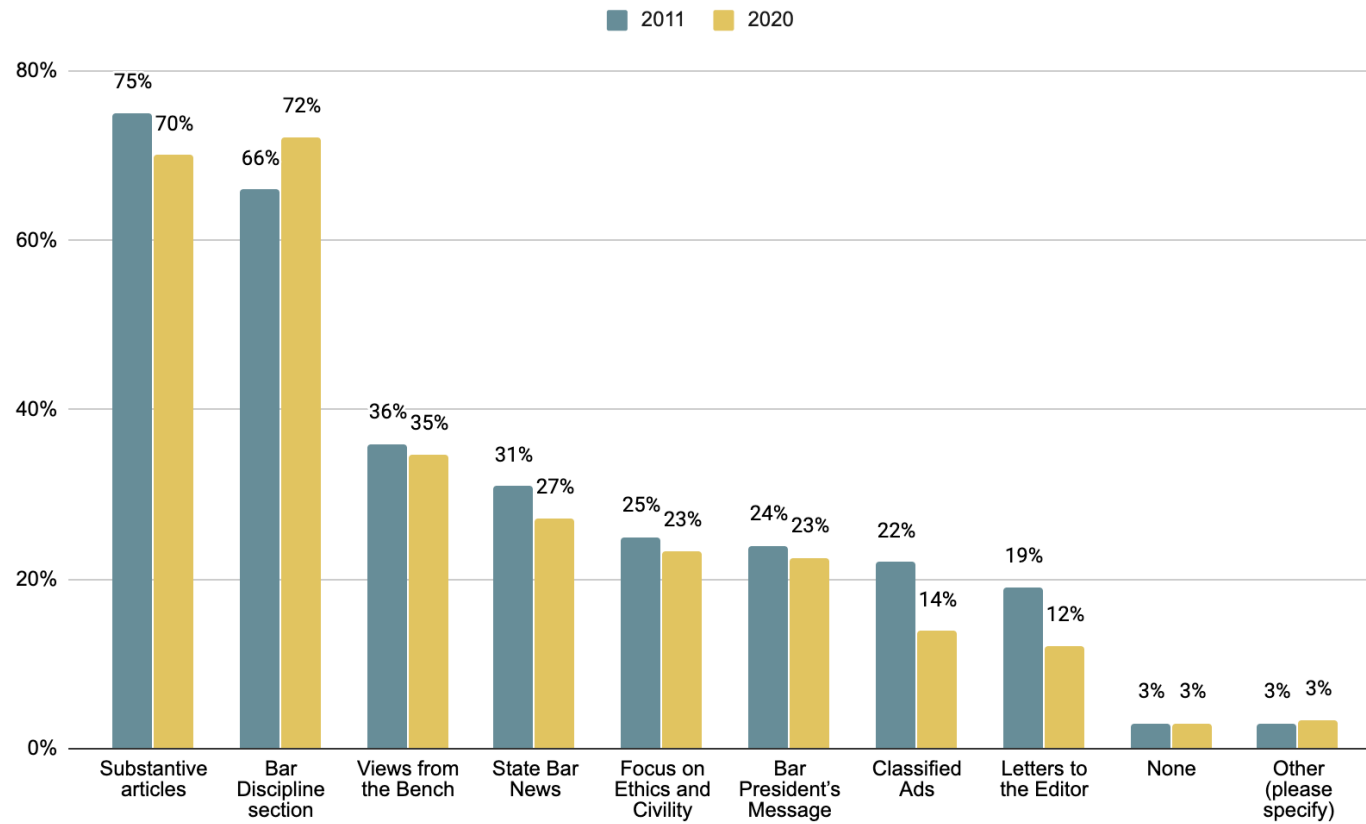


Which of the following best describes how often you read at least a portion of the Utah Bar Journal?



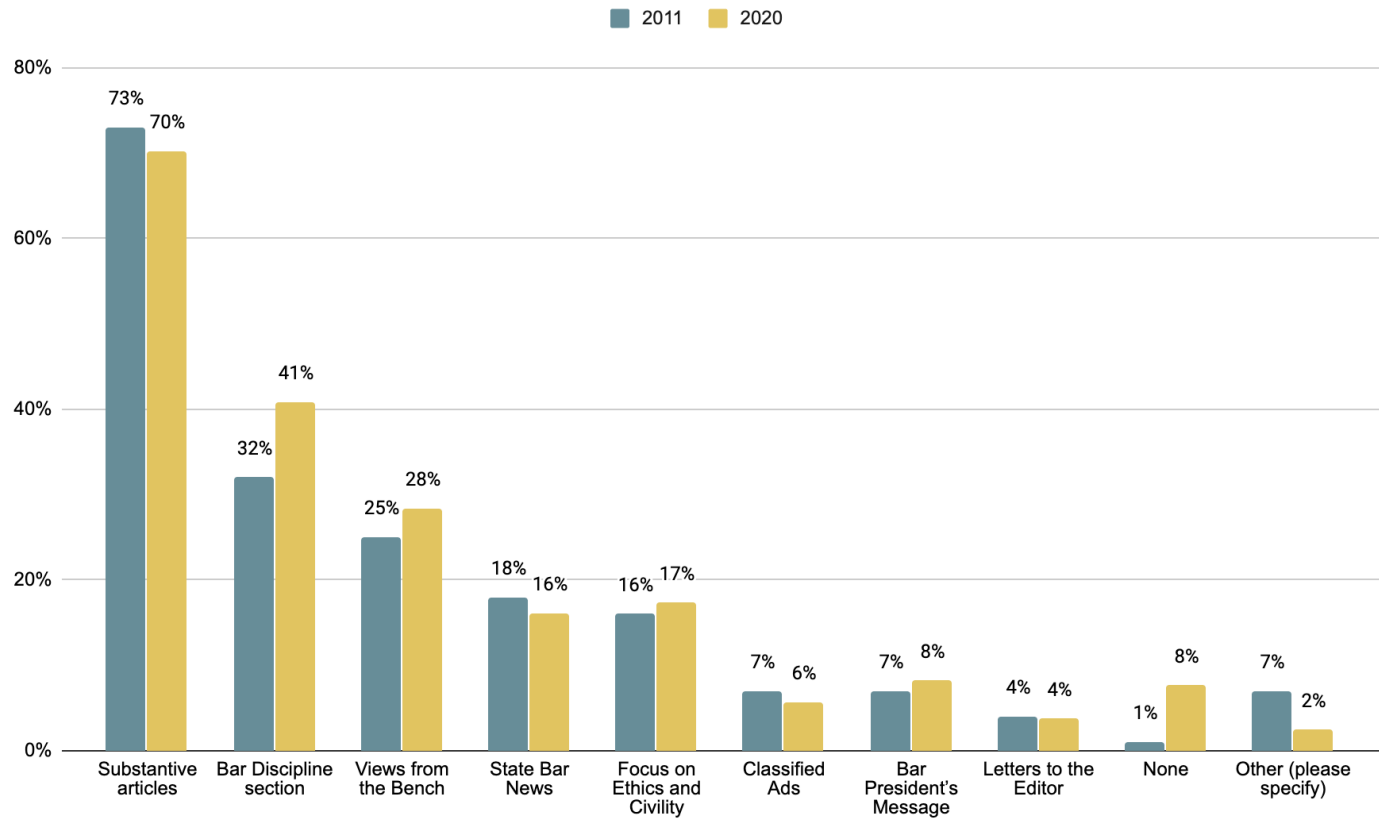
What sections of the Utah Bar Journal do you read most often?

Please select all that apply.

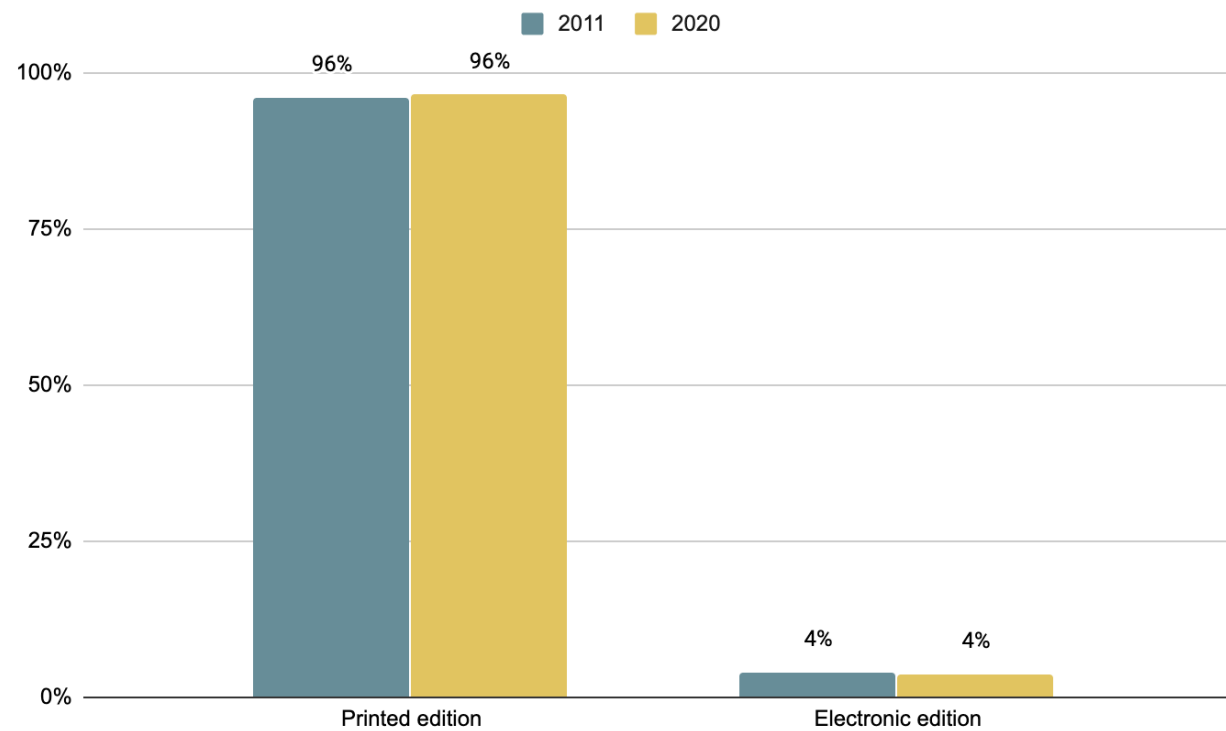


What sections of the Bar Journal do you find most useful?

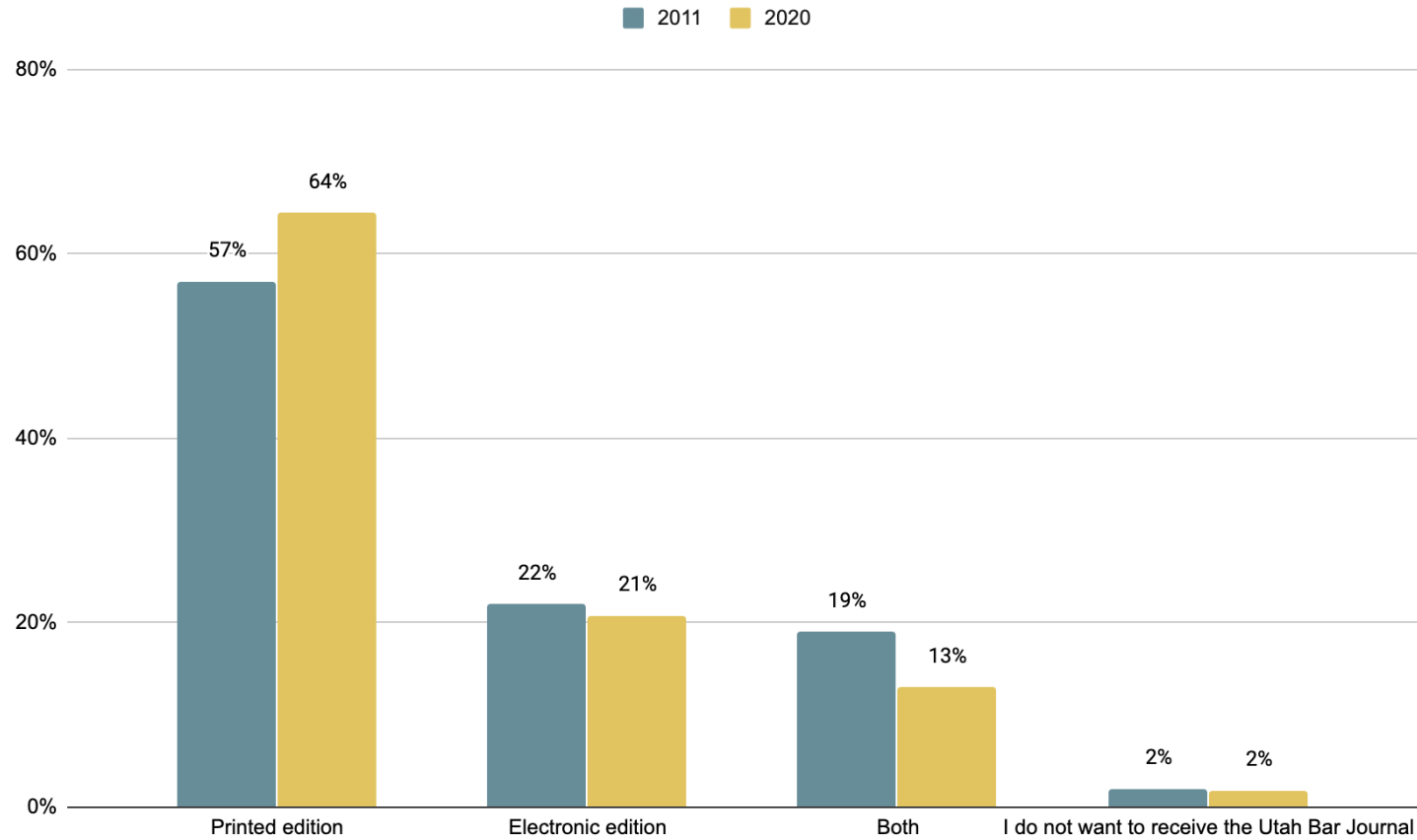
Please select all that apply.



How do you most often read the Utah Bar Journal?

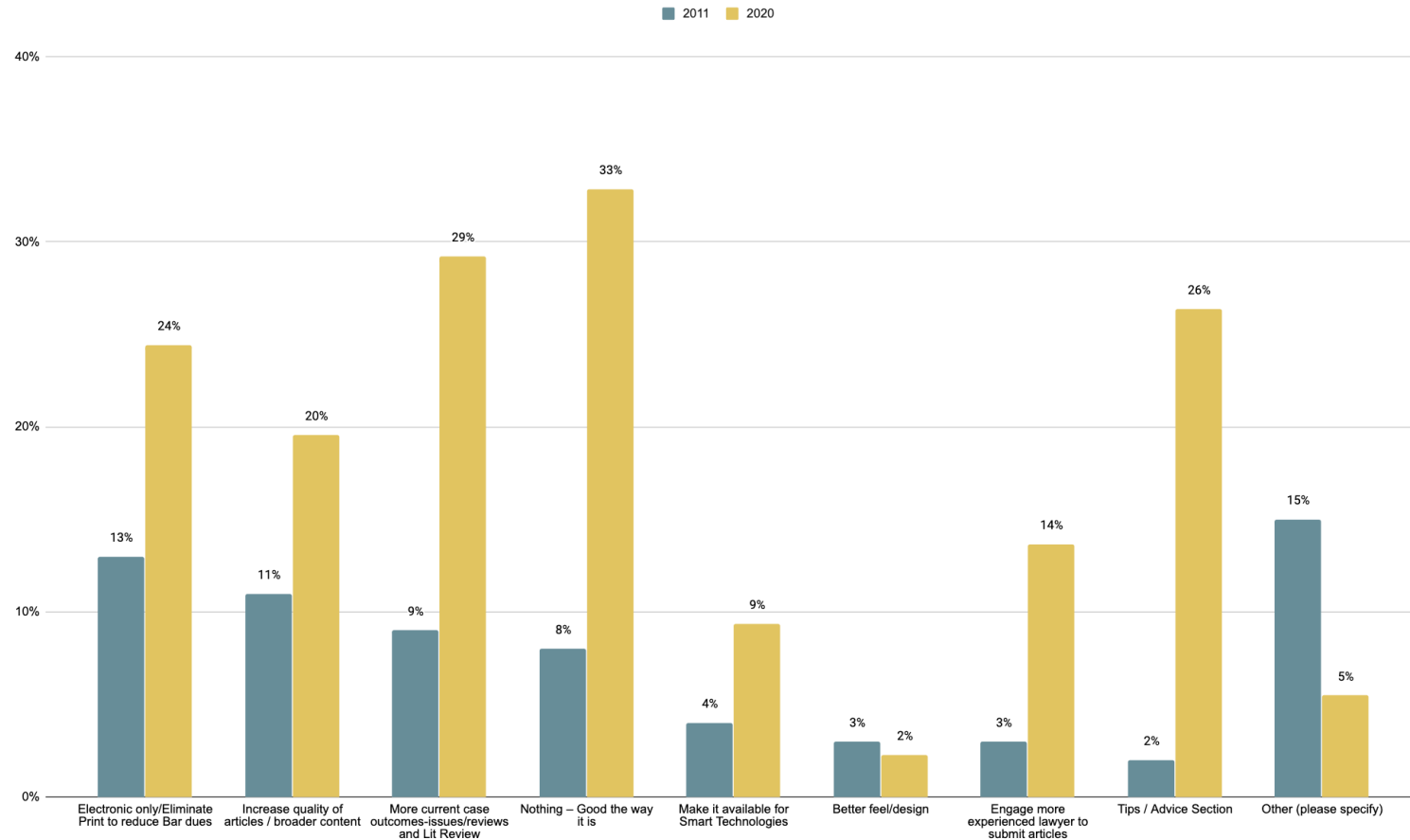


How would you prefer to receive the Utah Bar Journal?

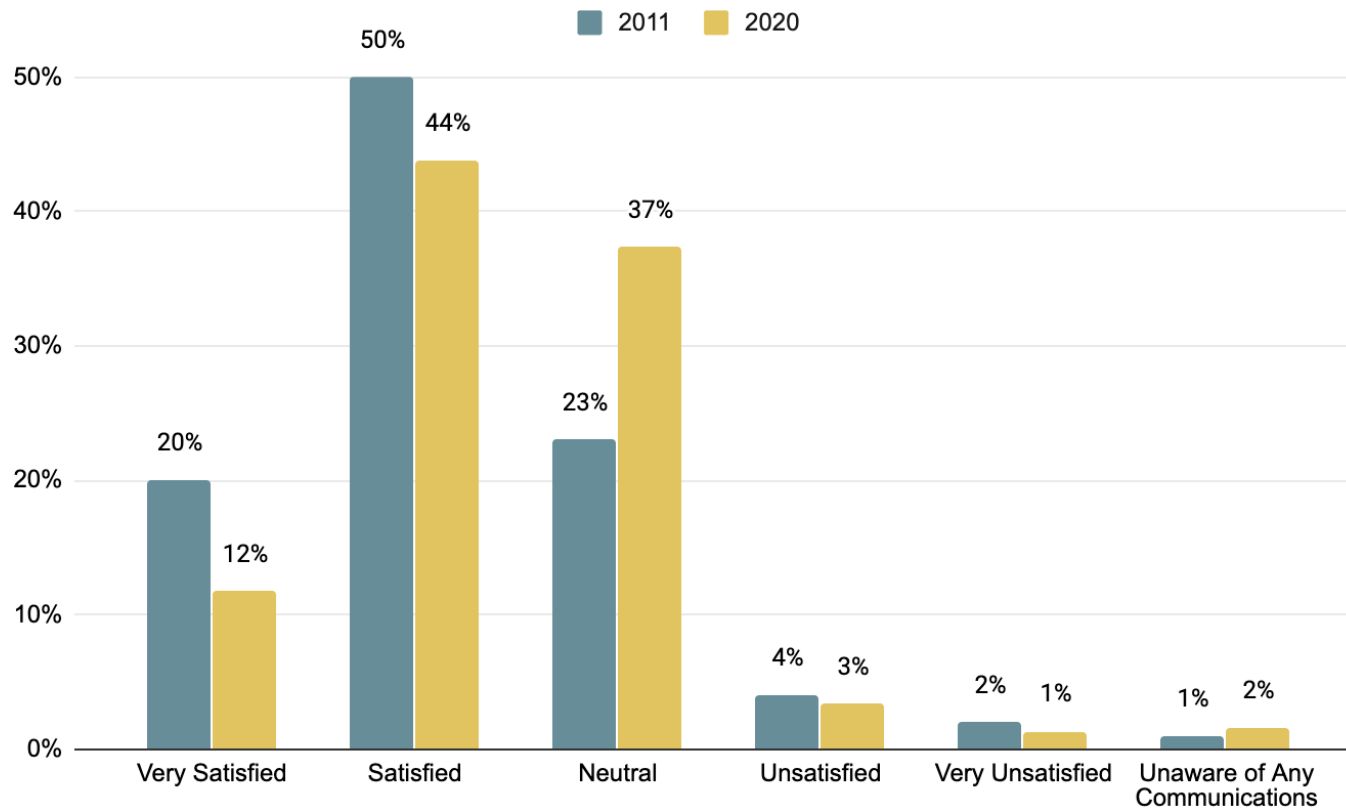


Is there anything you would like to see added or changed with respect to the Utah Bar Journal?

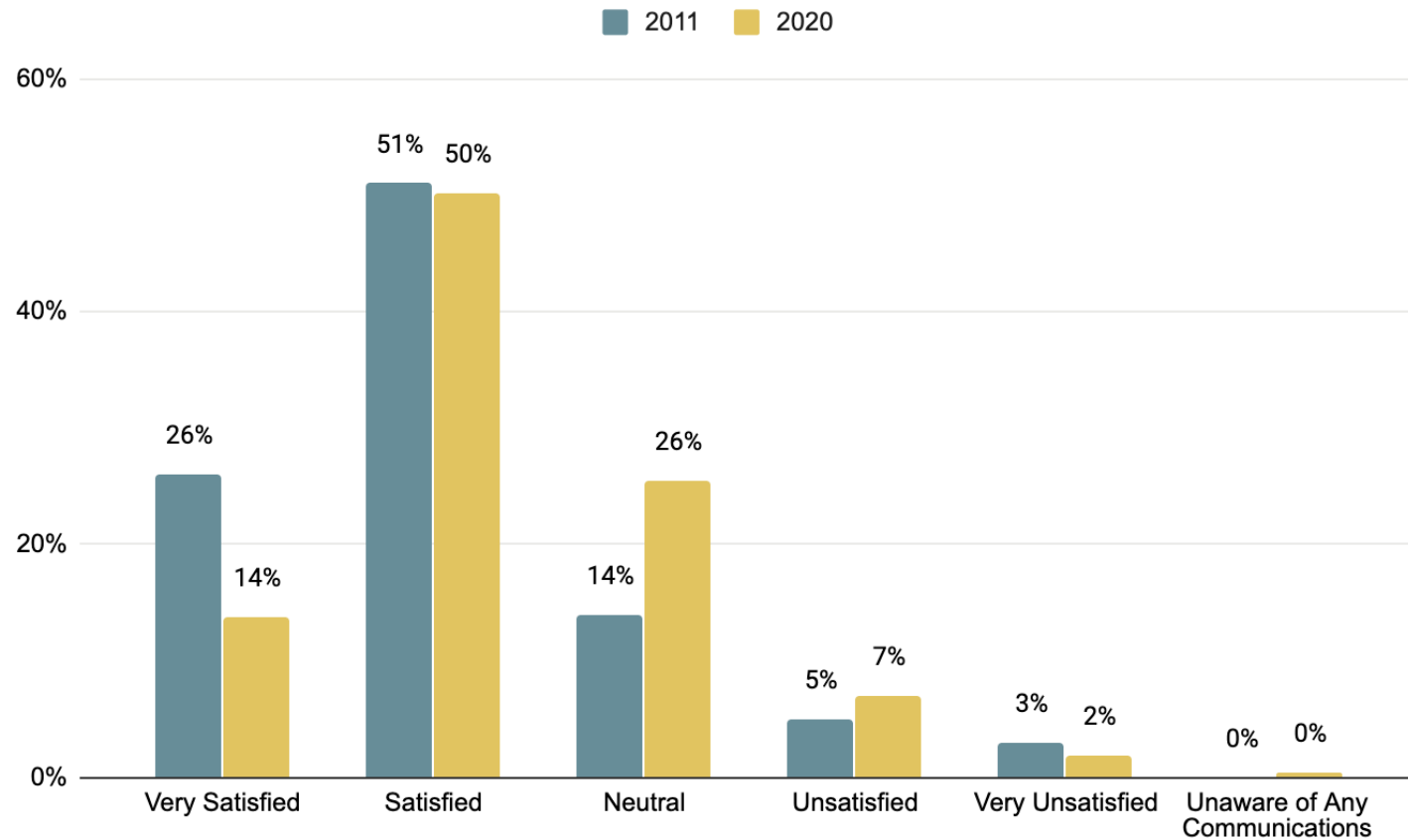
Please select all that apply.



Please rate your satisfaction with the Bar's communications to its members concerning Bar Activities.

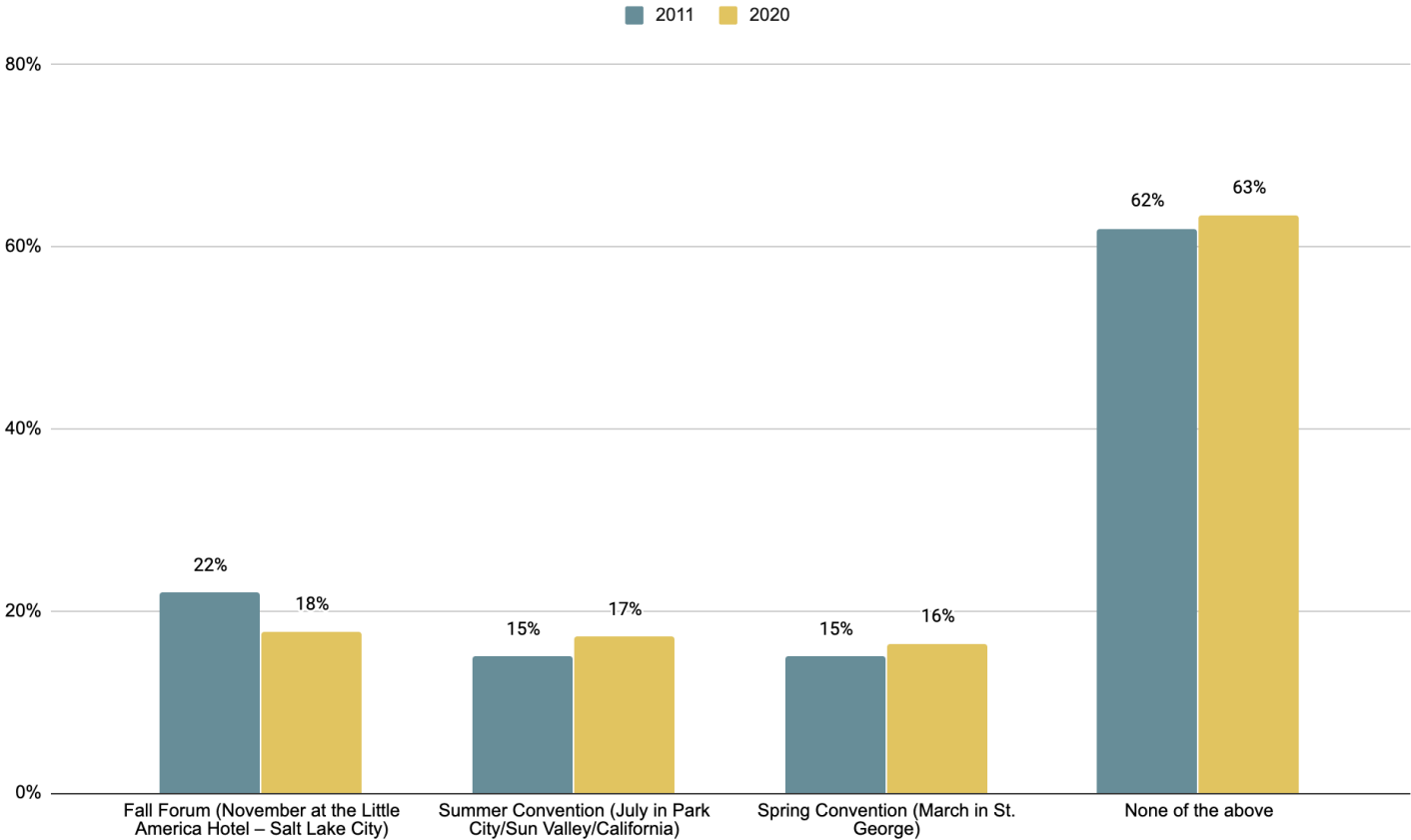


Please rate your satisfaction with the Bar's communications to its members concerning continuing legal education.



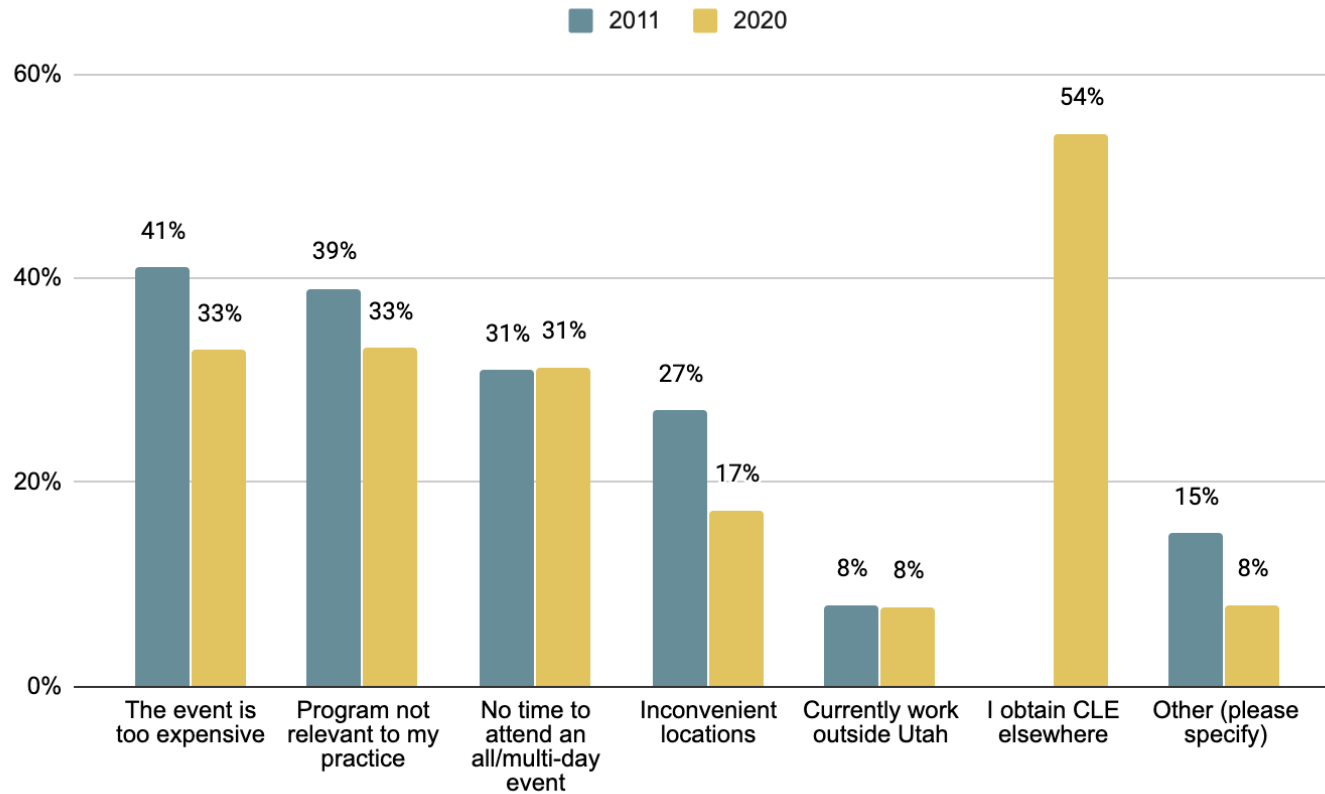
Which of the following Utah State Bar events do you attend when you are able?

Please select all that apply.



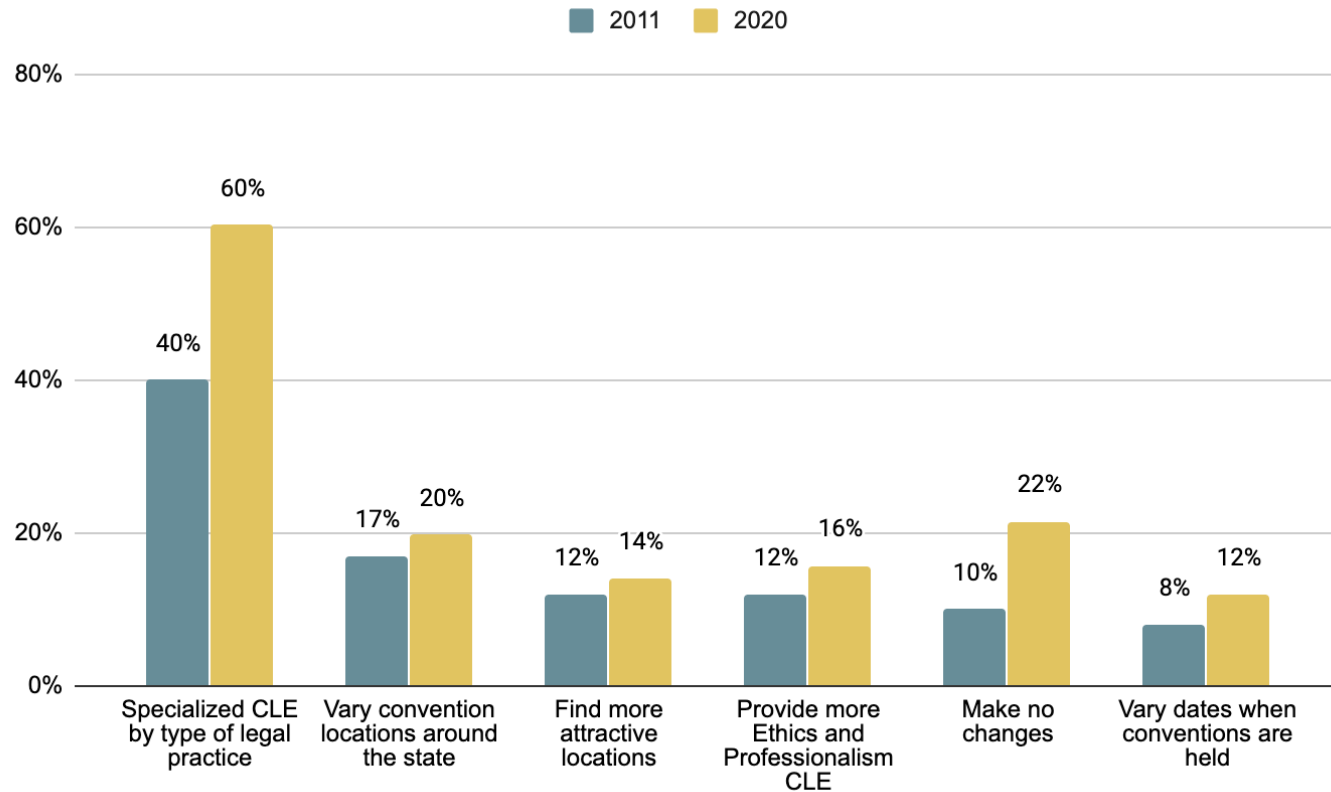
If you do not attend the Summer Convention in July, Fall Forum in November, or Spring Convention in March, please select the reasons:

Please select all that apply.



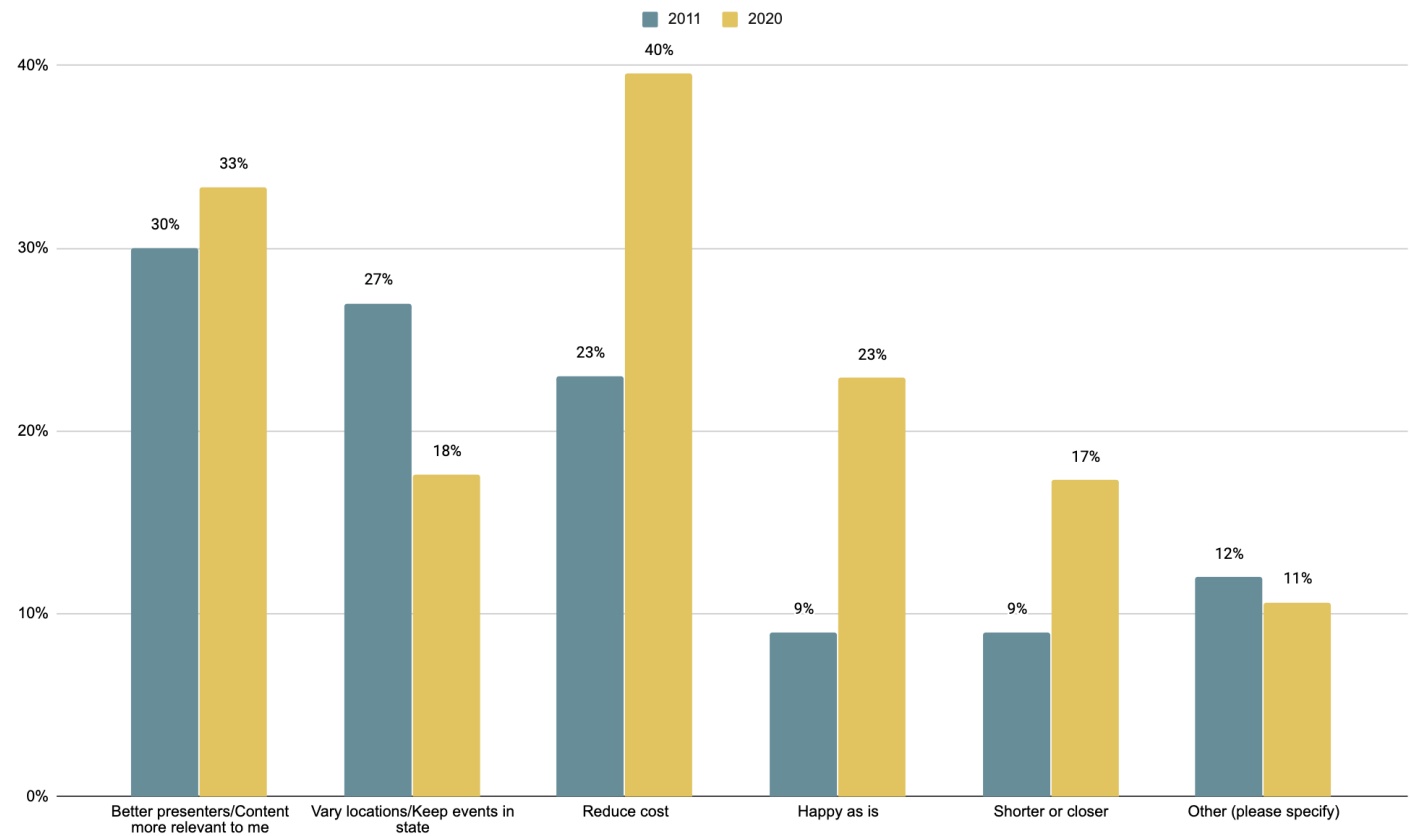
Which of the following would increase the likelihood that you will attend one or more of the above-mentioned major Utah Bar events in the next year?

Please select all that apply.

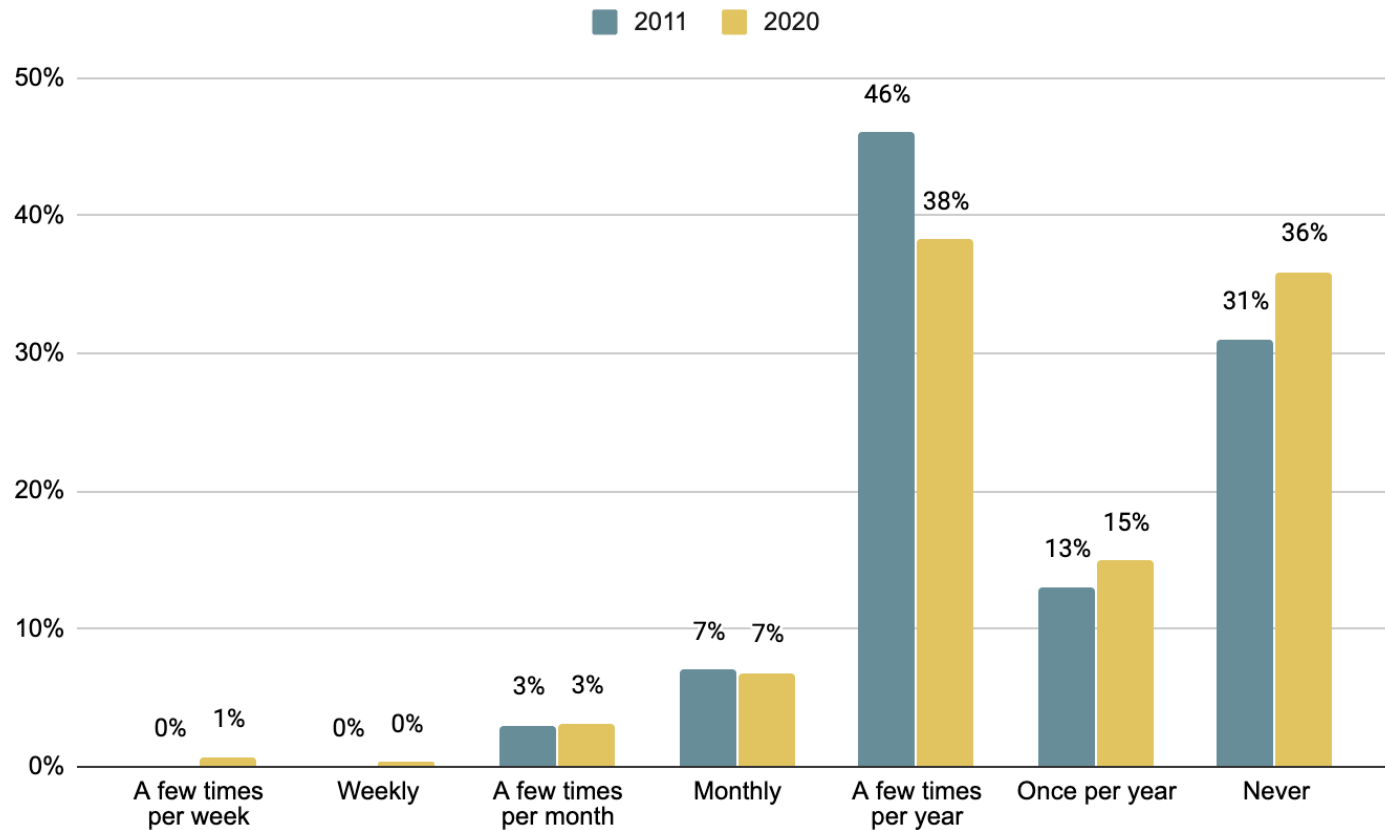


Share any suggestions for changes or improvements to the Summer Convention, Spring Convention or Fall Forum?

Please select all that apply.

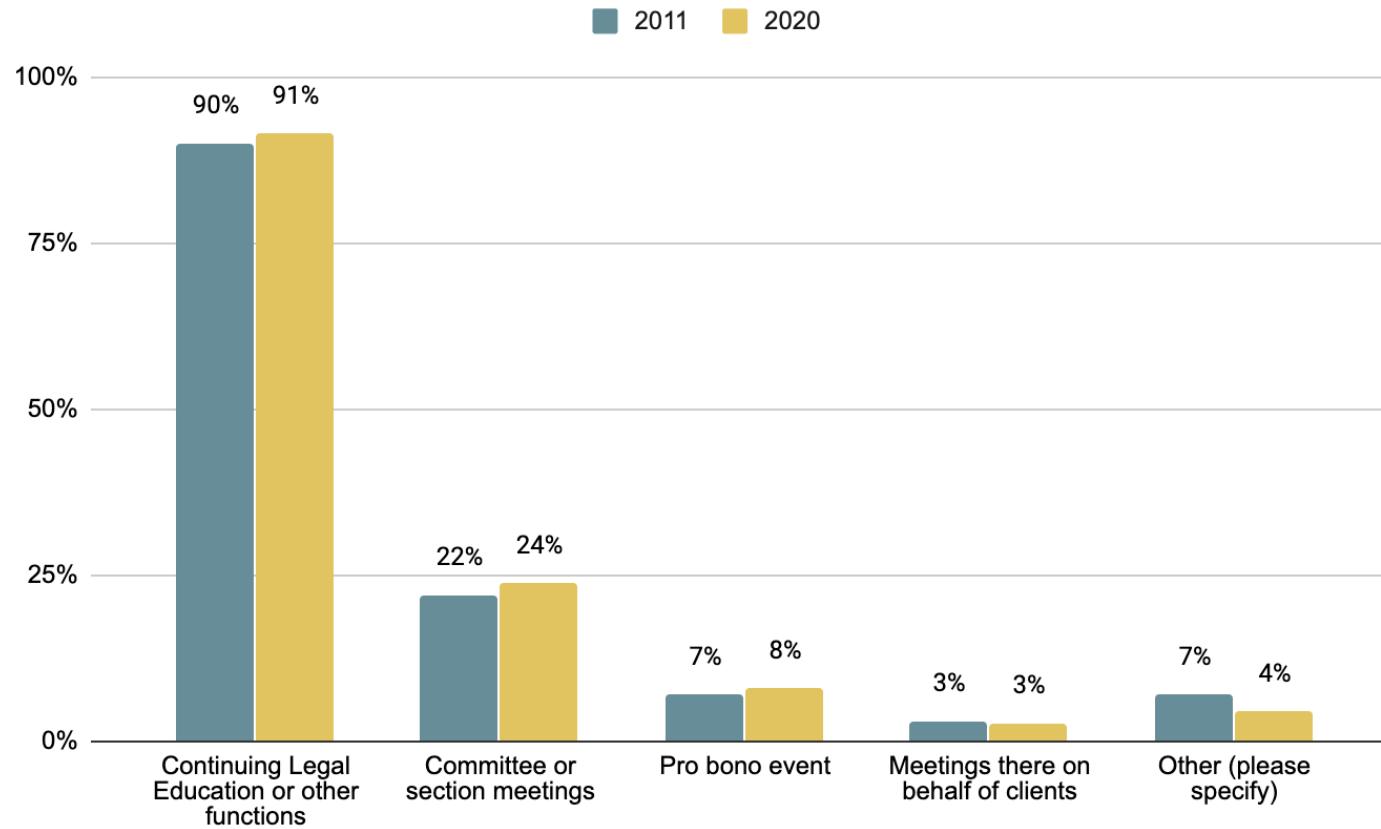


Which of the following best describes how often you have visited and/or used the Utah Law and Justice Center in the last year?



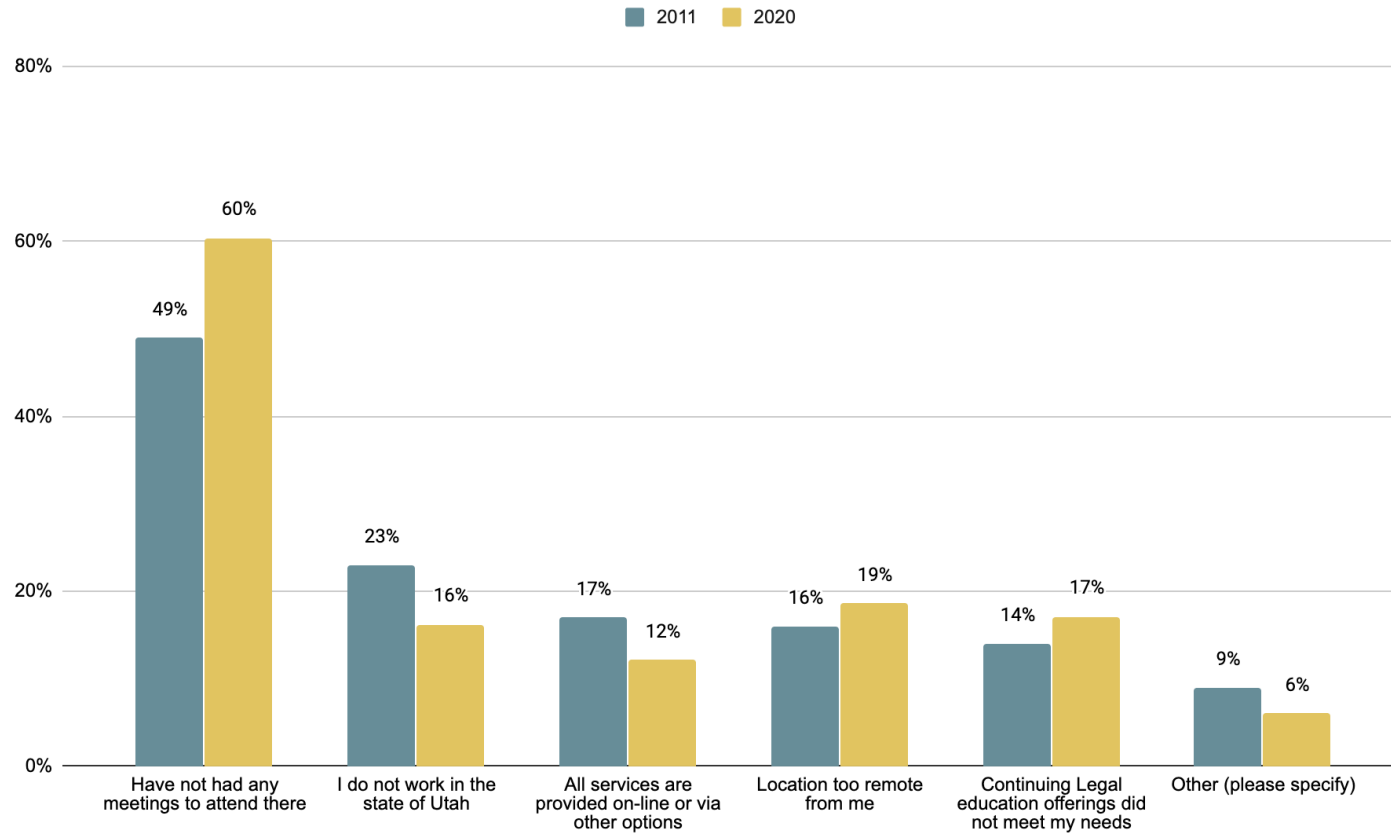
What are the primary reasons you have visited or used the Utah Law and Justice Center in the past year?

Please select all that apply.



What are the primary reasons you have not visited or used the Utah Law and Justice Center in the past year?


Please select all that apply.



Diversity and Inclusion

Almost half of survey respondents say their firm/office implements a diversity/inclusion policy.

43% of survey respondents have a diversity/inclusion policy in their firm/office while 36% of respondents said they do not have a diversity/inclusion policy and 21% say they don't know if their firm/office has a diversity/inclusion policy.

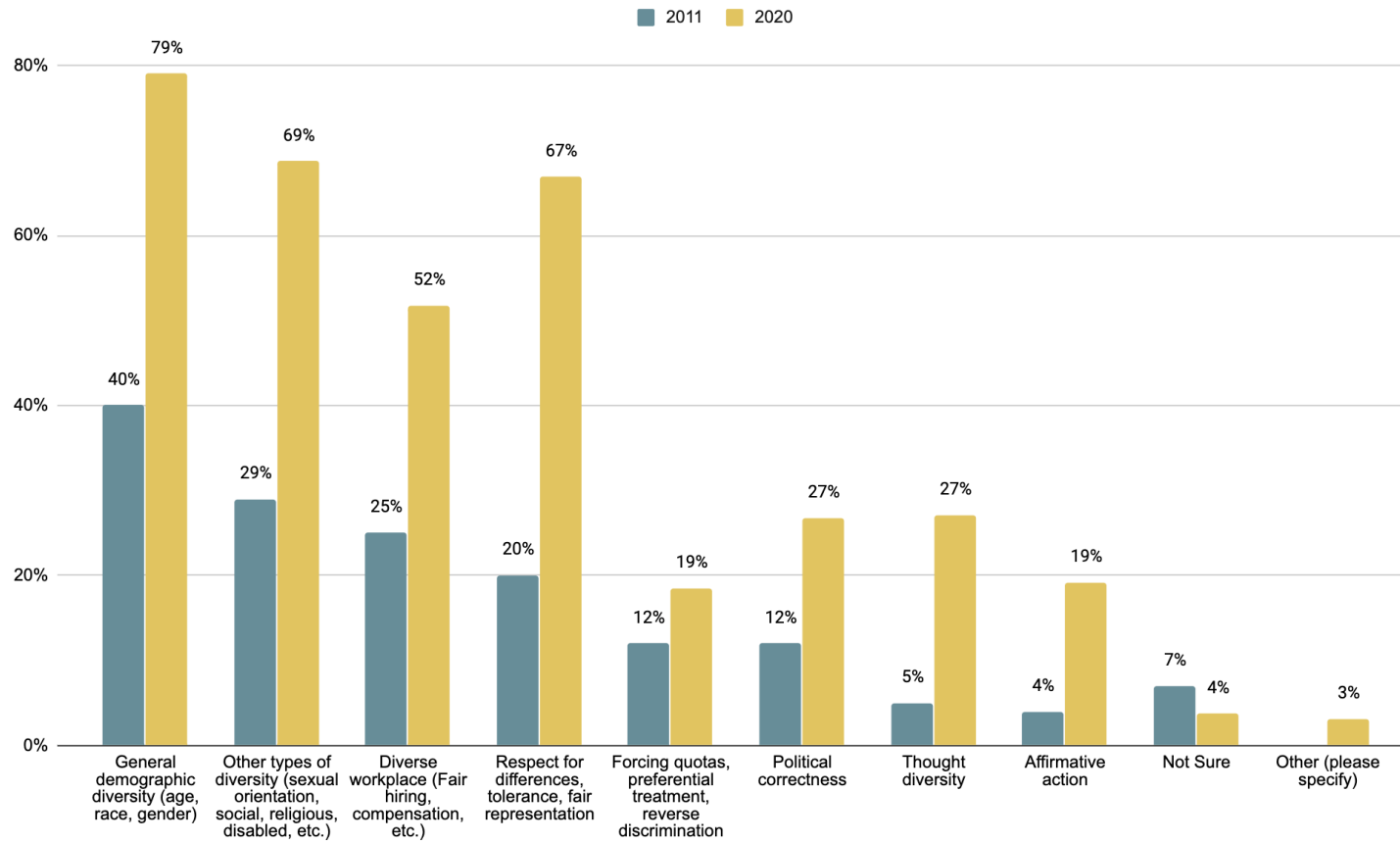


Almost half of survey respondents have attended a CLE or other event about diversity/inclusion in the last two years.

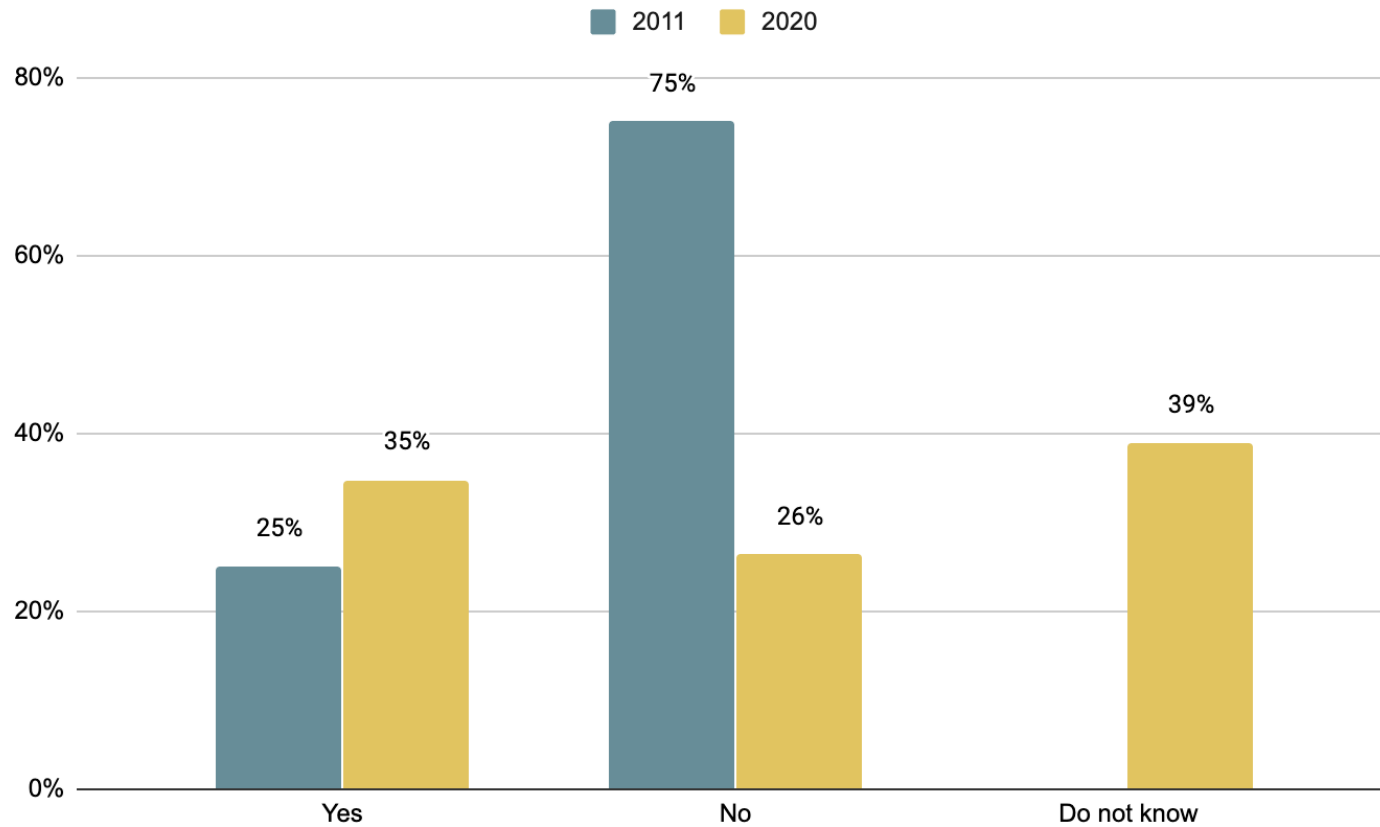
42% of respondents have attended a CLE or other event about diversity/inclusion in the last two years.

When you hear diversity/inclusion, what does it mean to you?

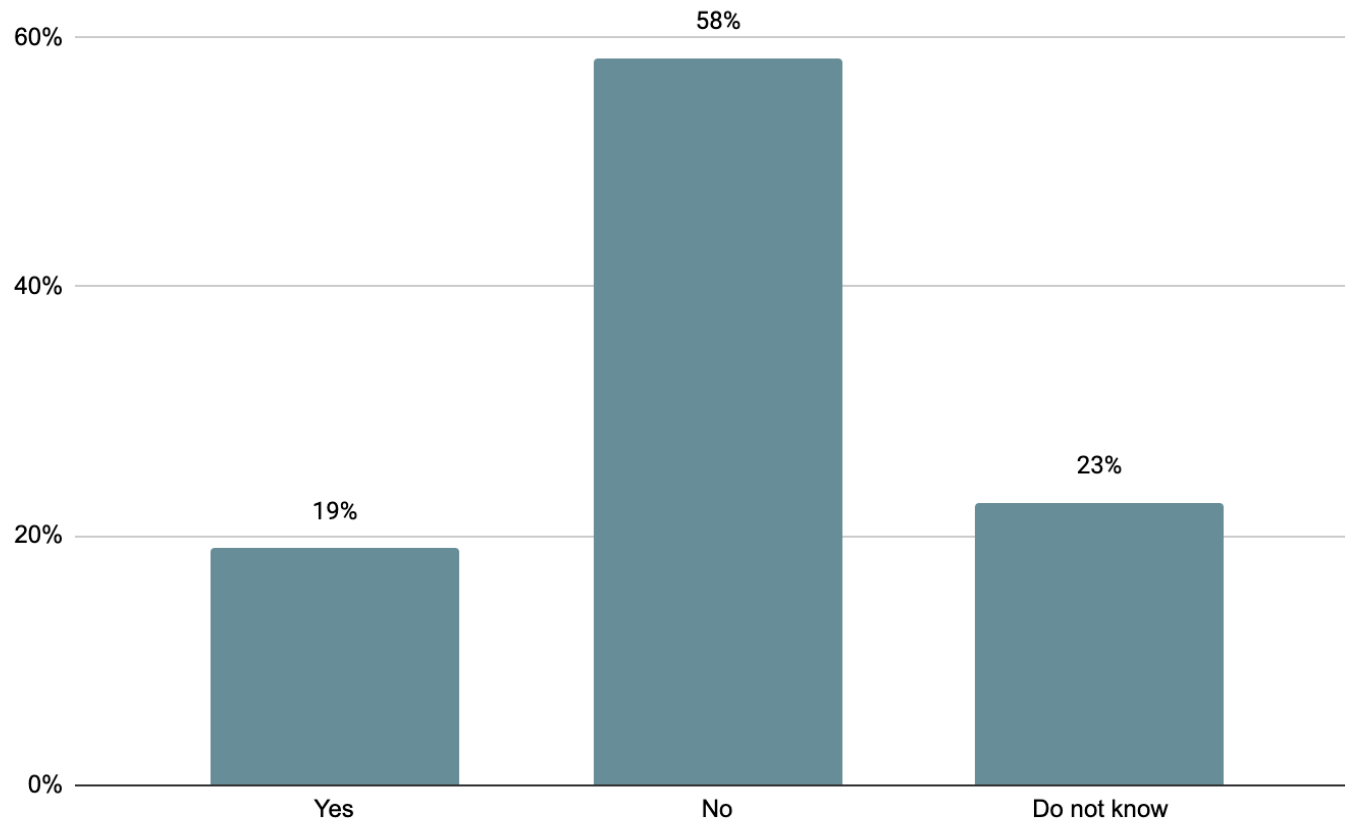
Please select all that apply.



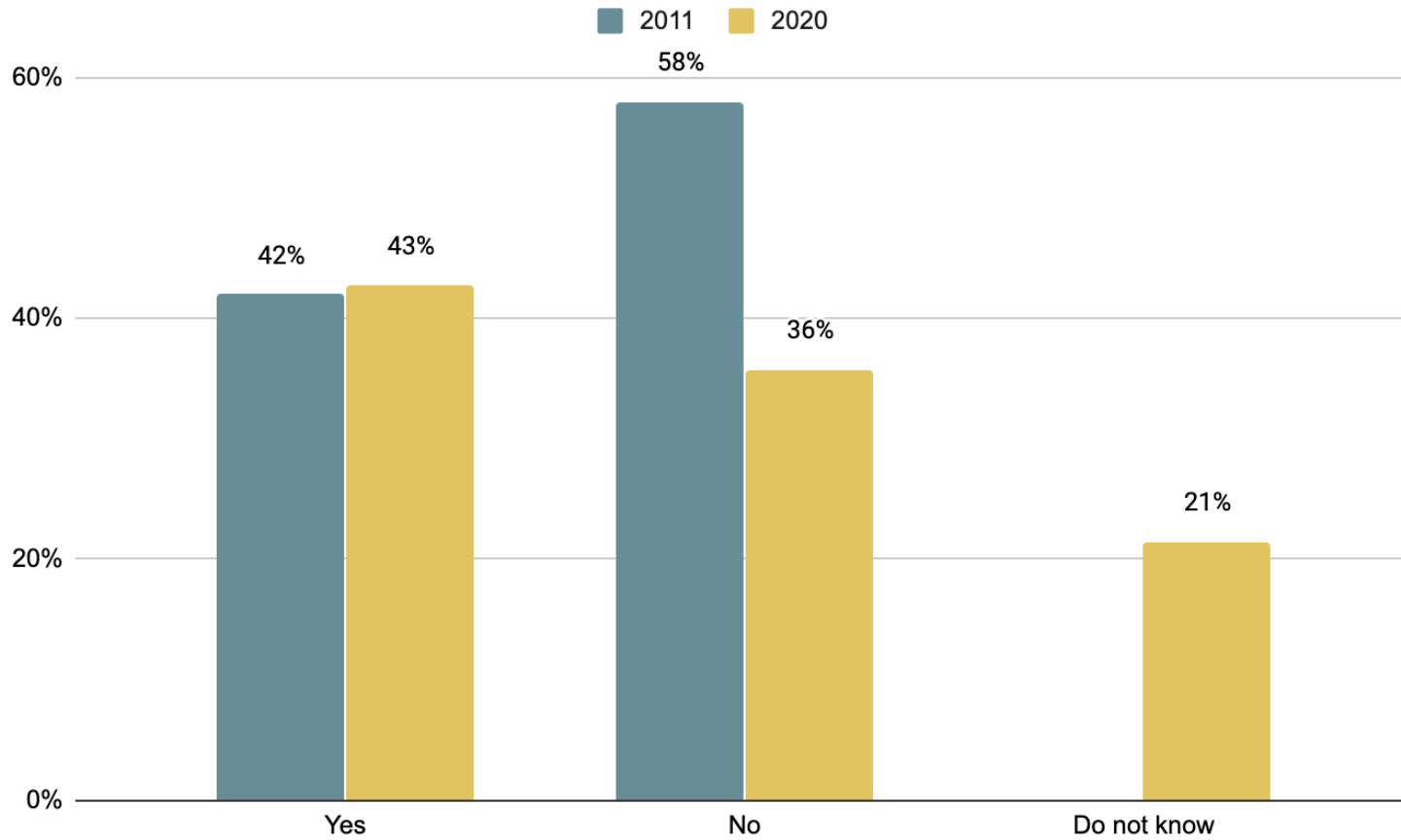
Do you have clients who emphasize diversity/inclusion within their own office?



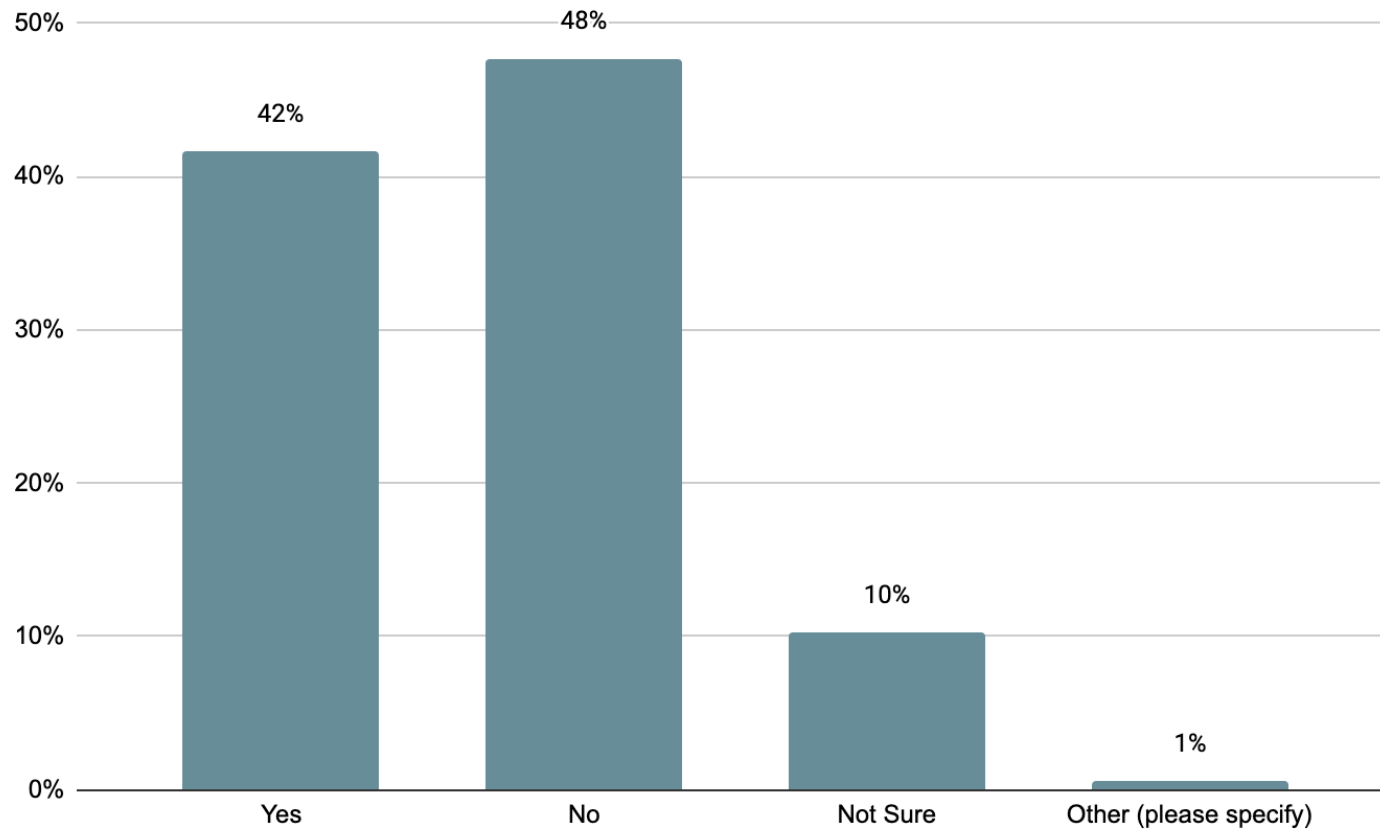
Do you have clients who request that you establish and/or follow a diversity/inclusion policy?



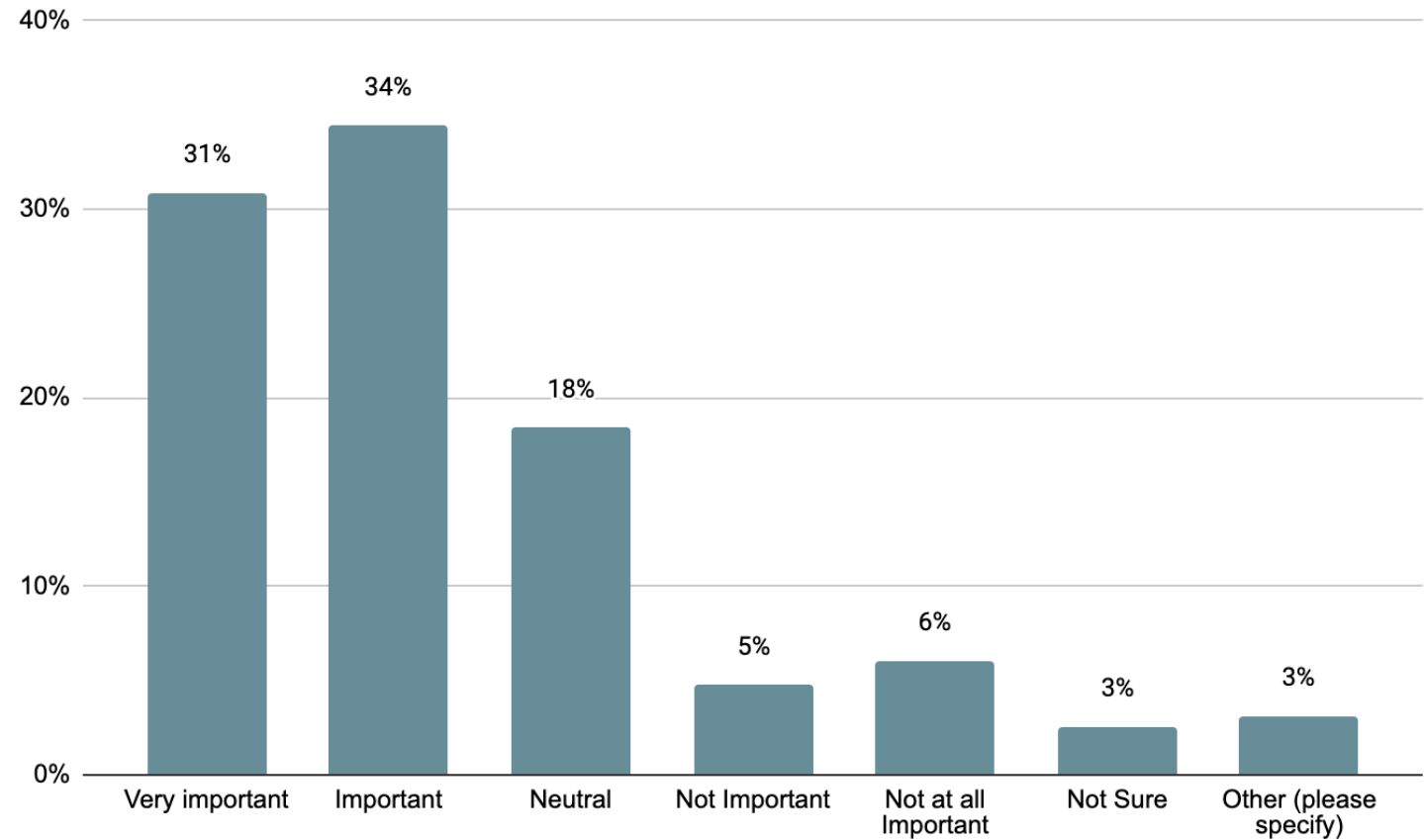
Do you have a diversity/inclusion policy in your firm/office?




In the past two years have you attended a CLE or other event about diversity/inclusion?



How important to you is diversity/inclusion in the legal profession?




Courts, Professionalism and Civility, and Access to Justice



The percentage of survey respondents who believe the public views lawyers *positively* has increased 24% from 2011 to 2020.

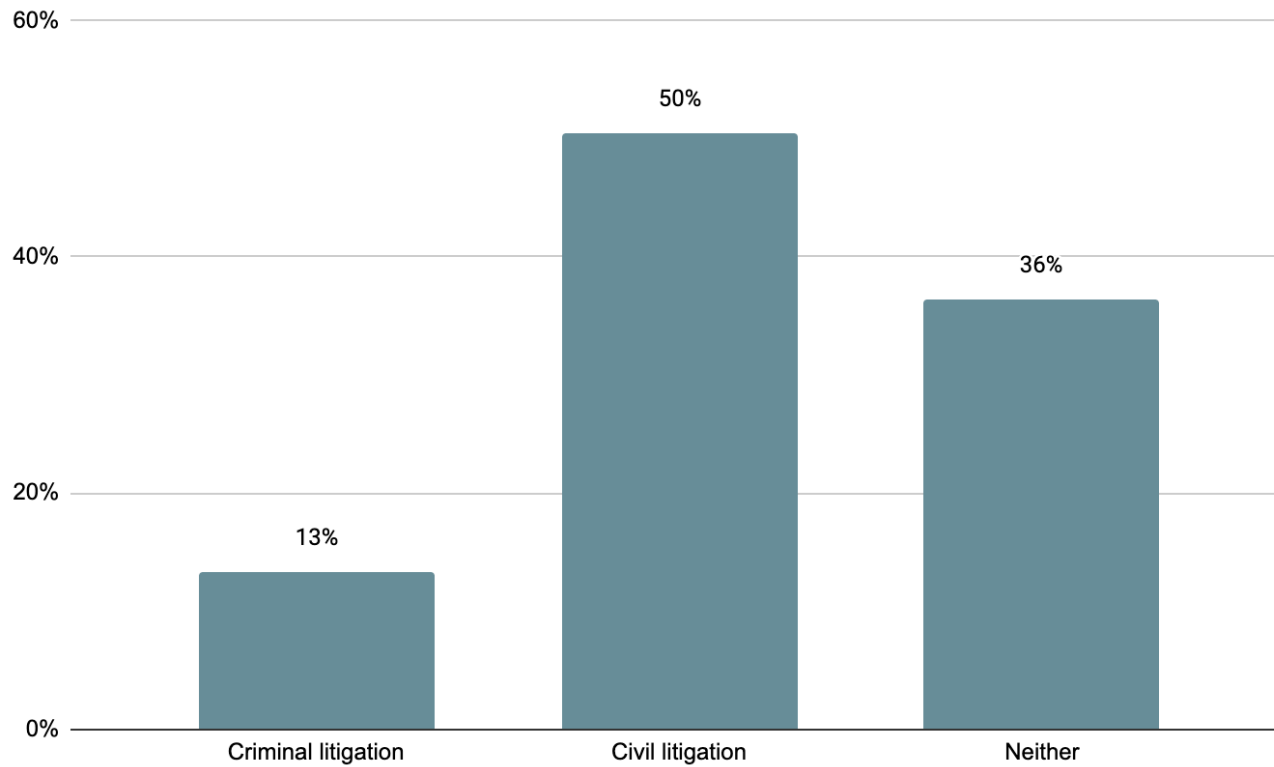
The percentage of survey respondents who believe the public views lawyers *negatively* has decreased by 20% from 2011 to 2020.



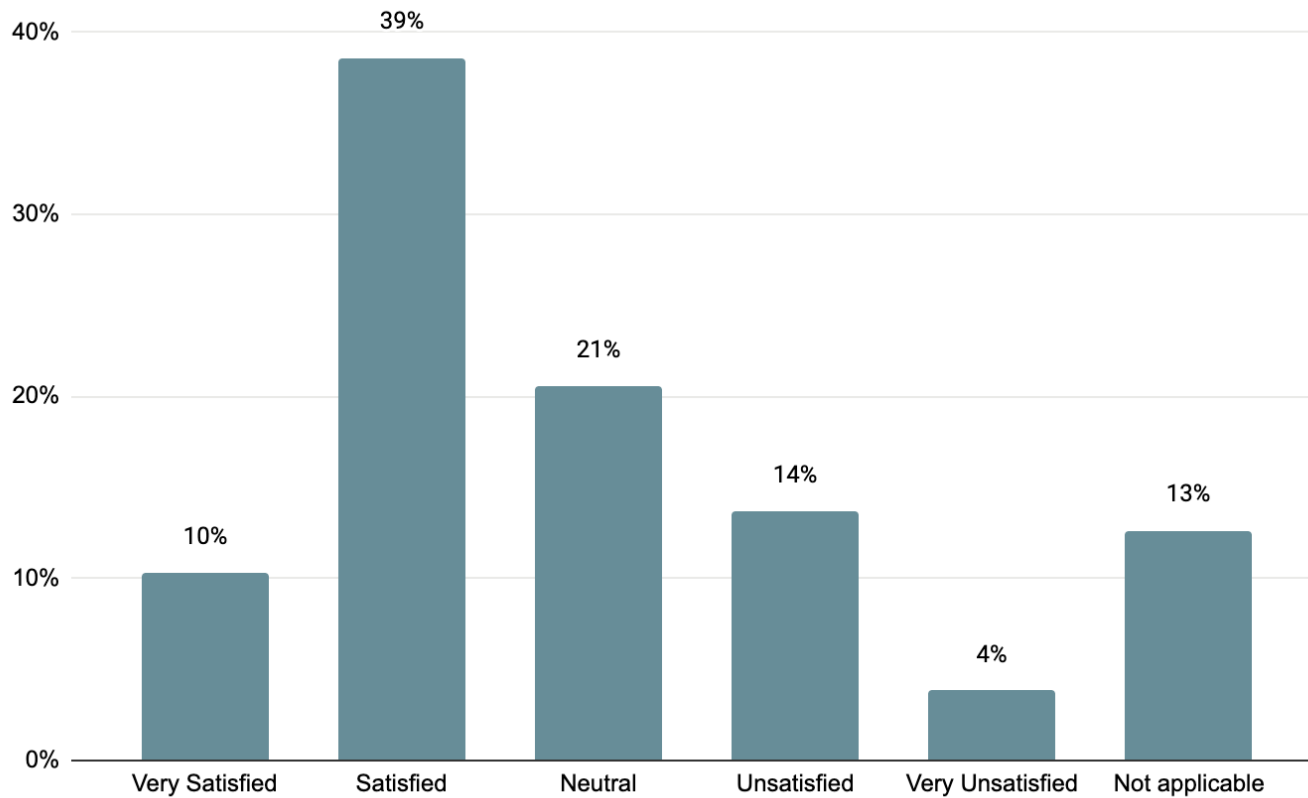
The majority of survey respondents are not aware of the *Narrowing the Access-to-Justice Gap by Reimagining Regulation* report.

72% of respondents have are not aware of the *Narrowing the Access-to-Justice Gap by Reimagining Regulation* report. Of the 28% of respondents who are aware of the report, 44% have read it.

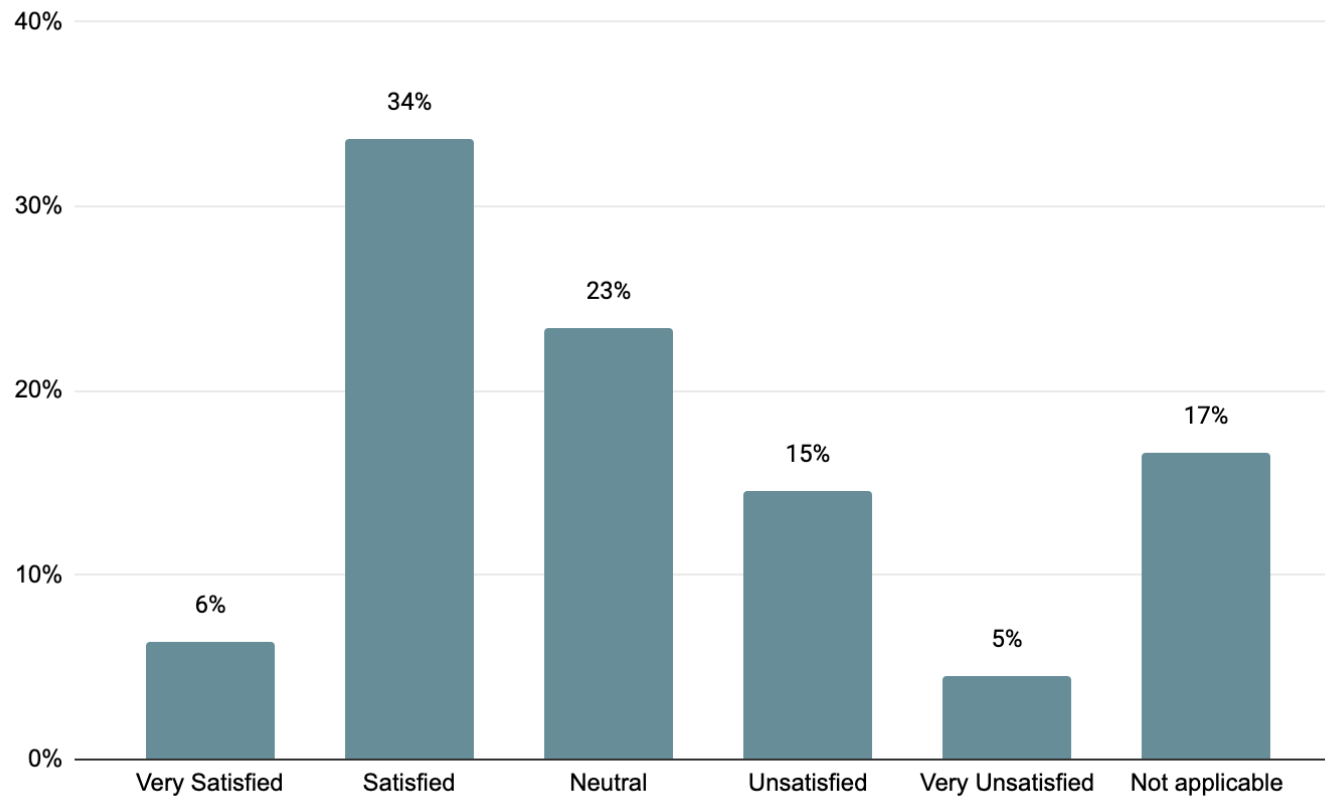
Is your practice primarily in criminal litigation or civil litigation?



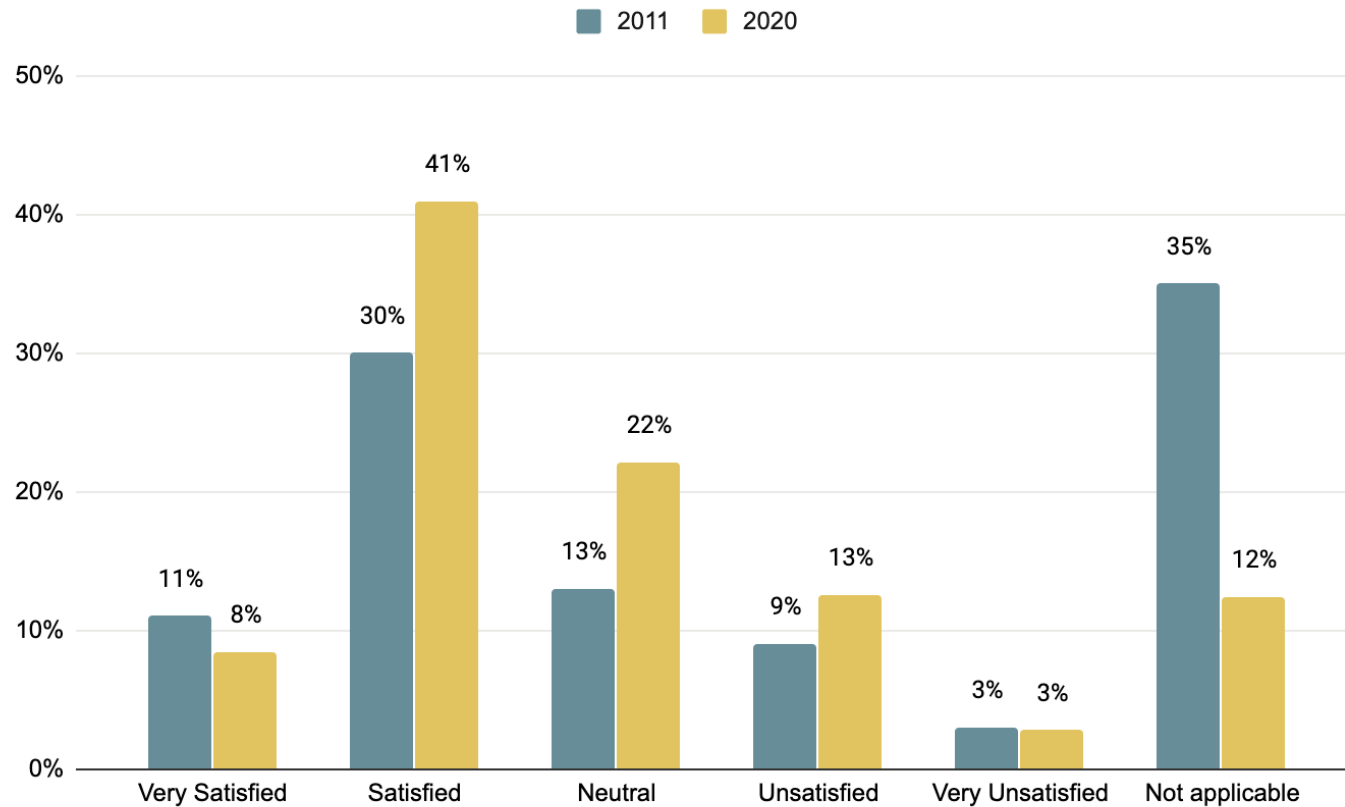
With respect to the Utah State Courts, please rate your satisfaction with the ability to get a timely setting for hearings.



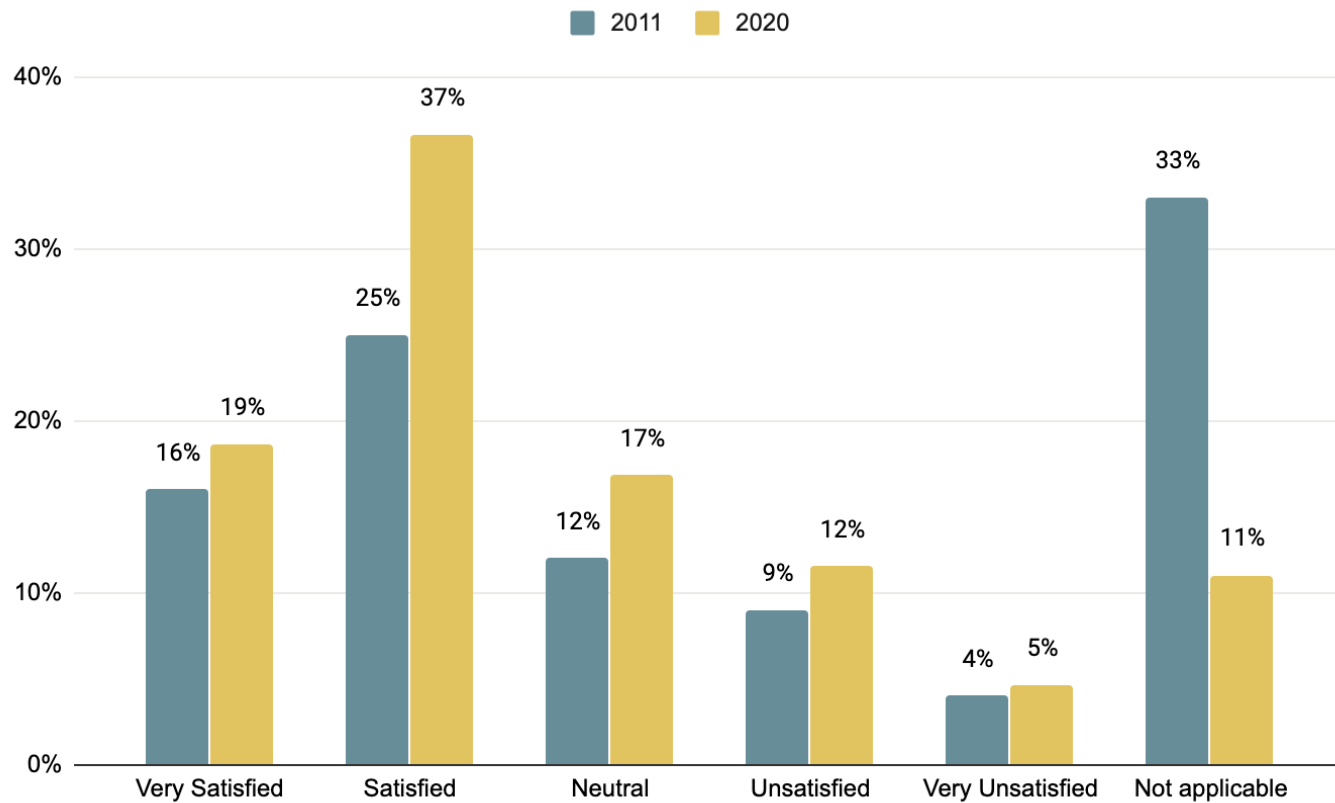
With respect to the Utah State Courts, please rate your satisfaction with the ability to get a timely setting for trials.



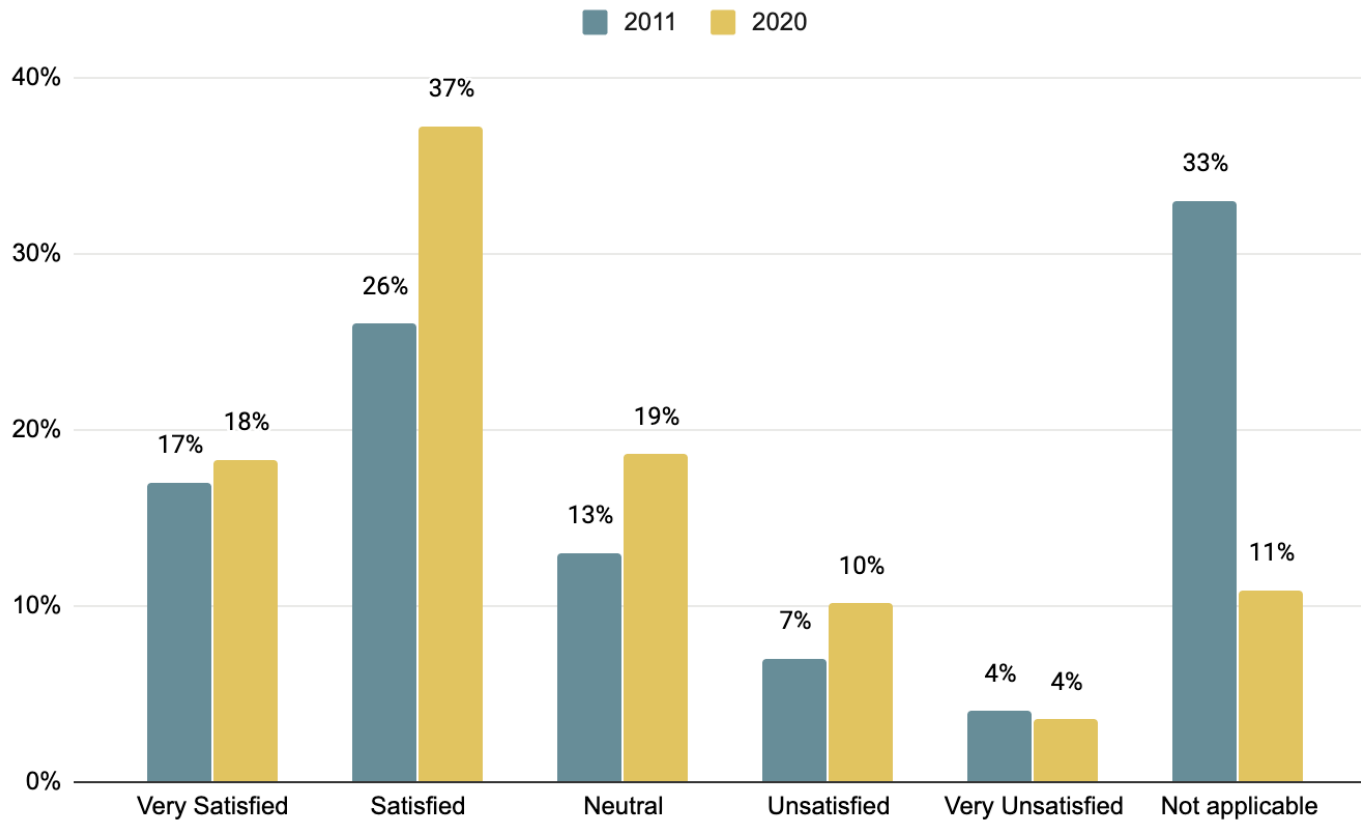
With respect to the Utah State Courts, please rate your satisfaction with the ability to get timely decisions from the Court following a hearing or trial.



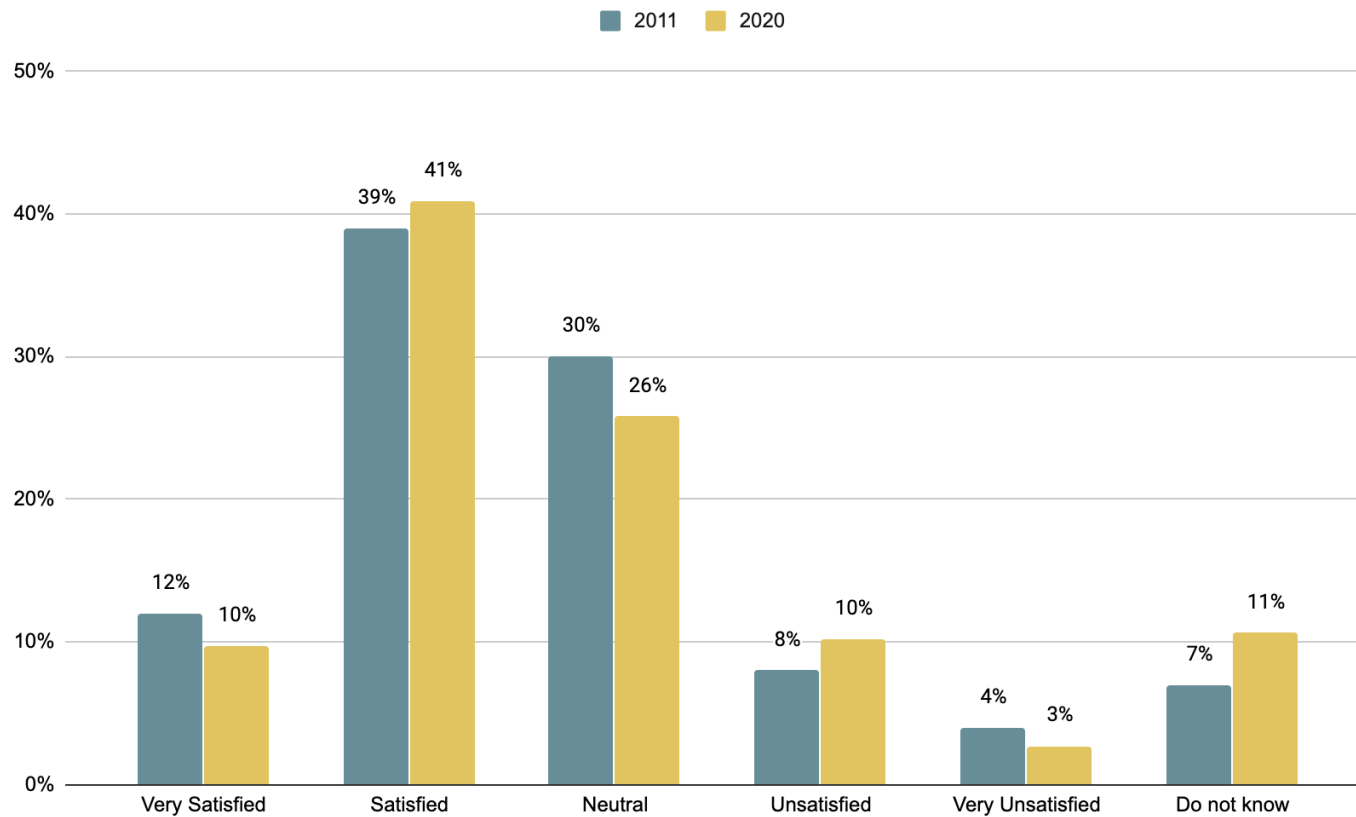
With respect to the Utah State Courts, please rate your satisfaction with the ability to reach clerks or court staff to make an inquiry.



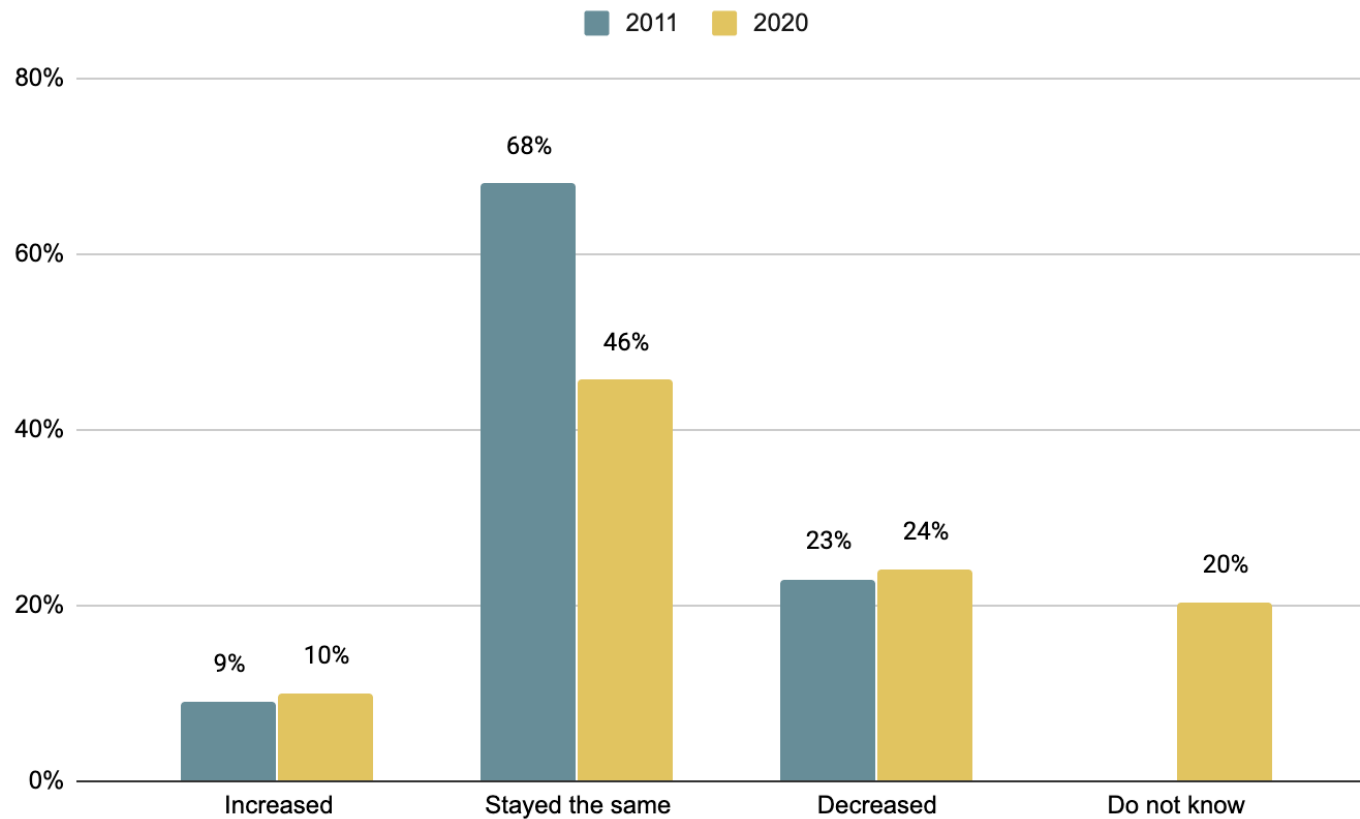
With respect to the Utah State Courts, please rate your satisfaction with the responsiveness of courts or staff to inquiries.



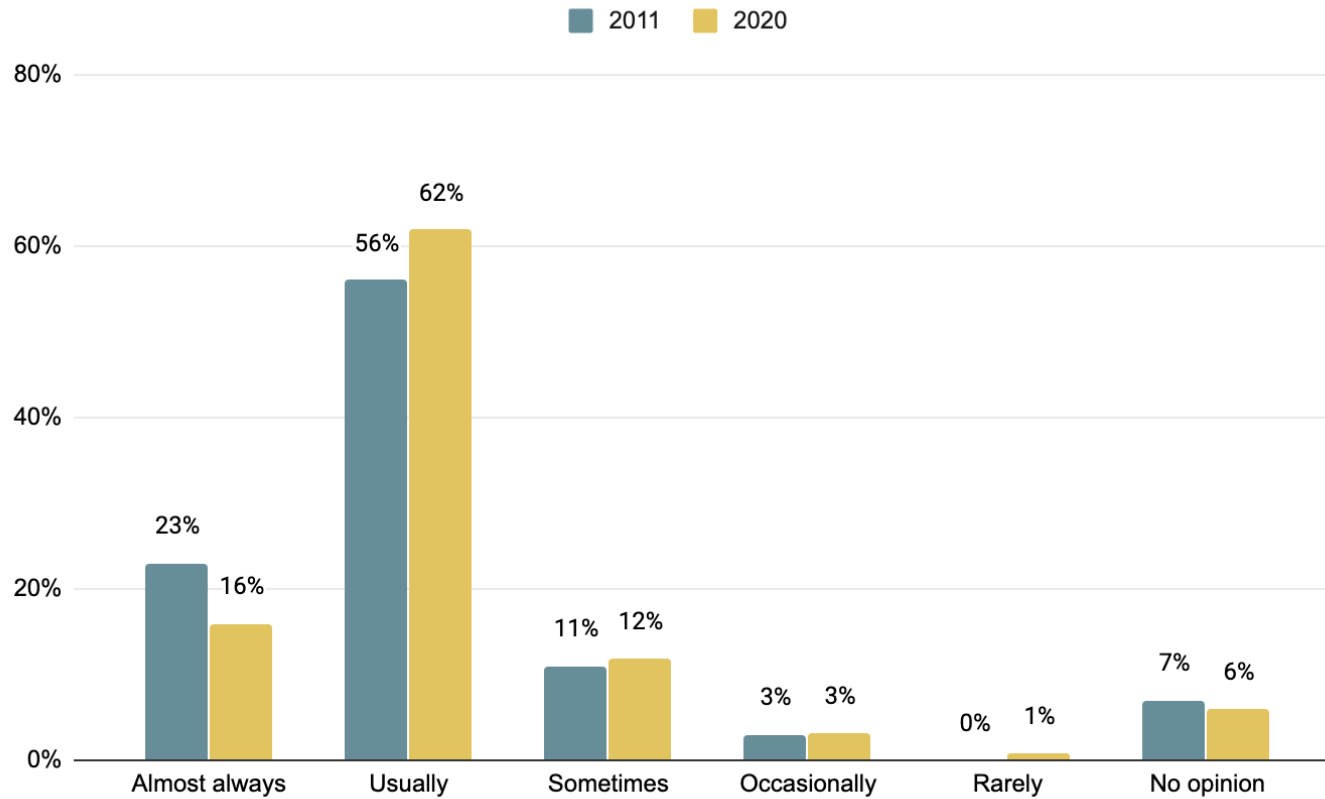
Please rate your satisfaction with the efforts of the Utah State Bar and Judiciary inside the courtroom to improve professionalism and civility among lawyers:



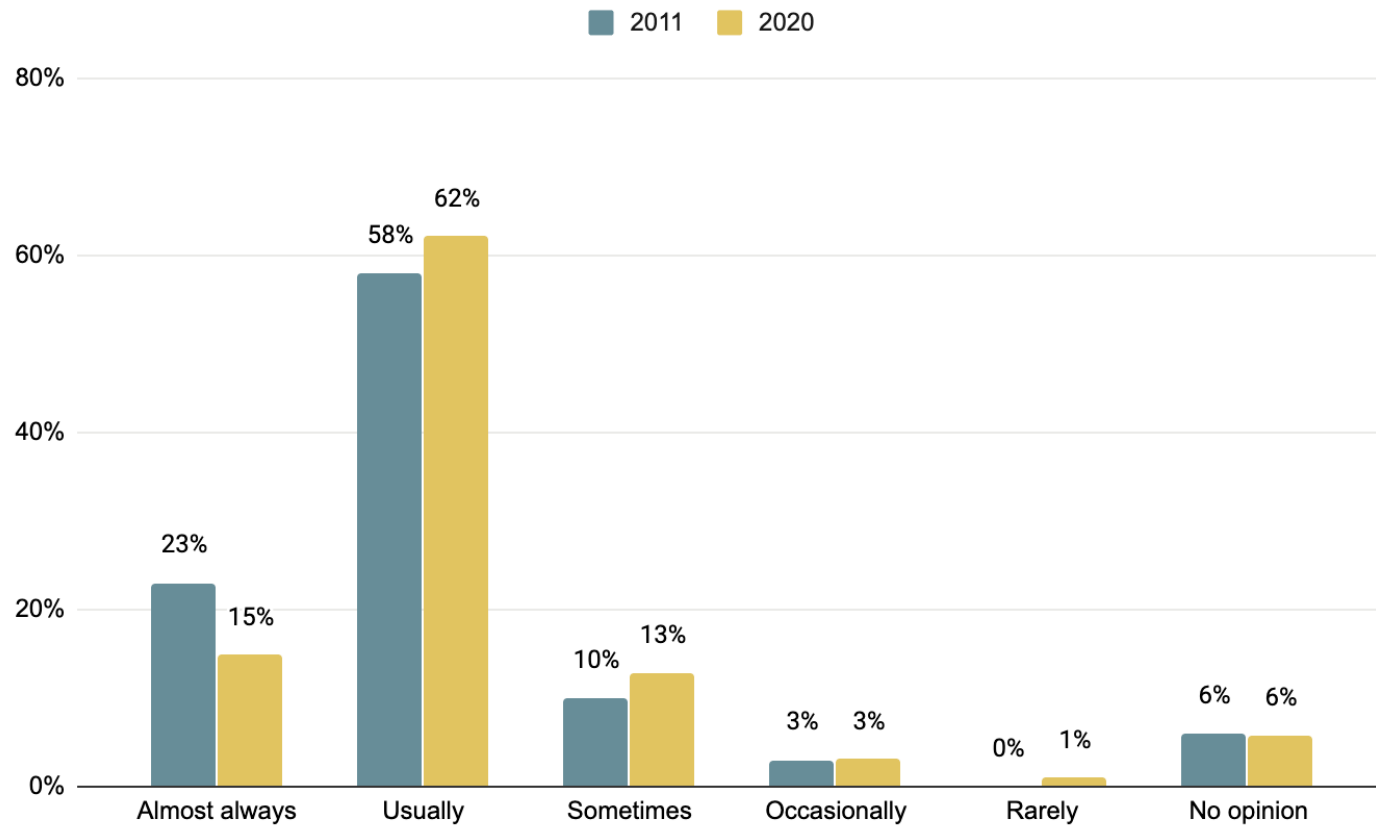
In your opinion, how has the level of professionalism and civility among lawyers changed over the last five years?



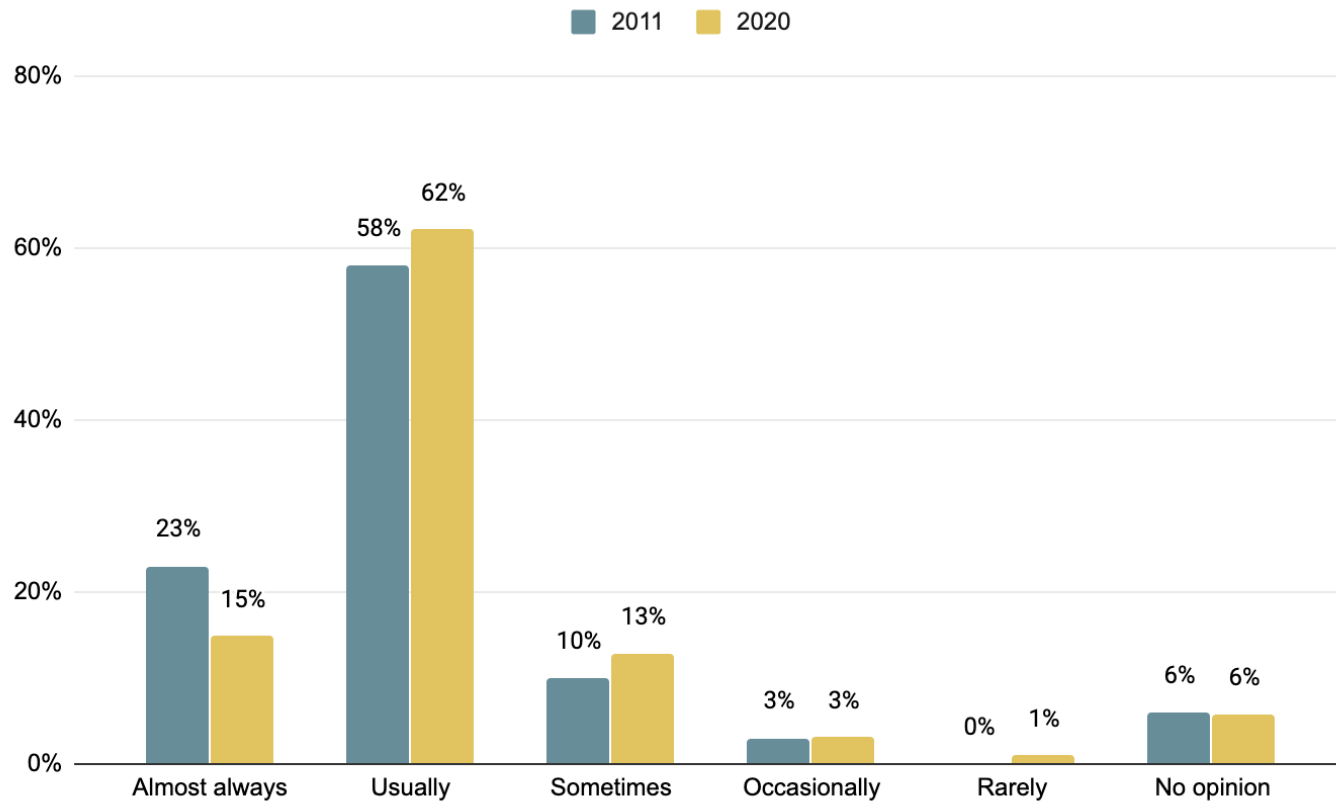
How would you rate Utah lawyers as a group on the following attributes (honest):



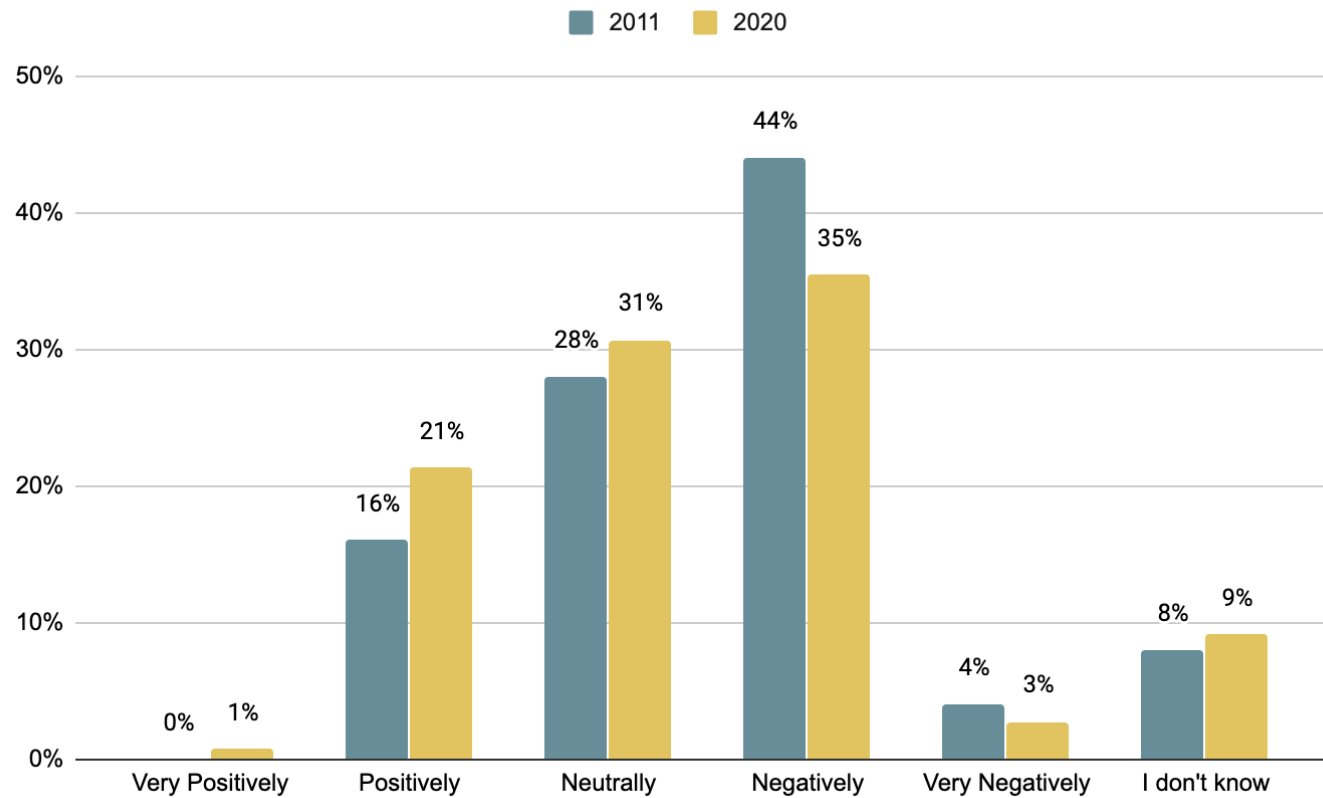
How would you rate Utah lawyers as a group on the following attributes (ethical):



How would you rate Utah lawyers as a group on the following attributes (courteous):

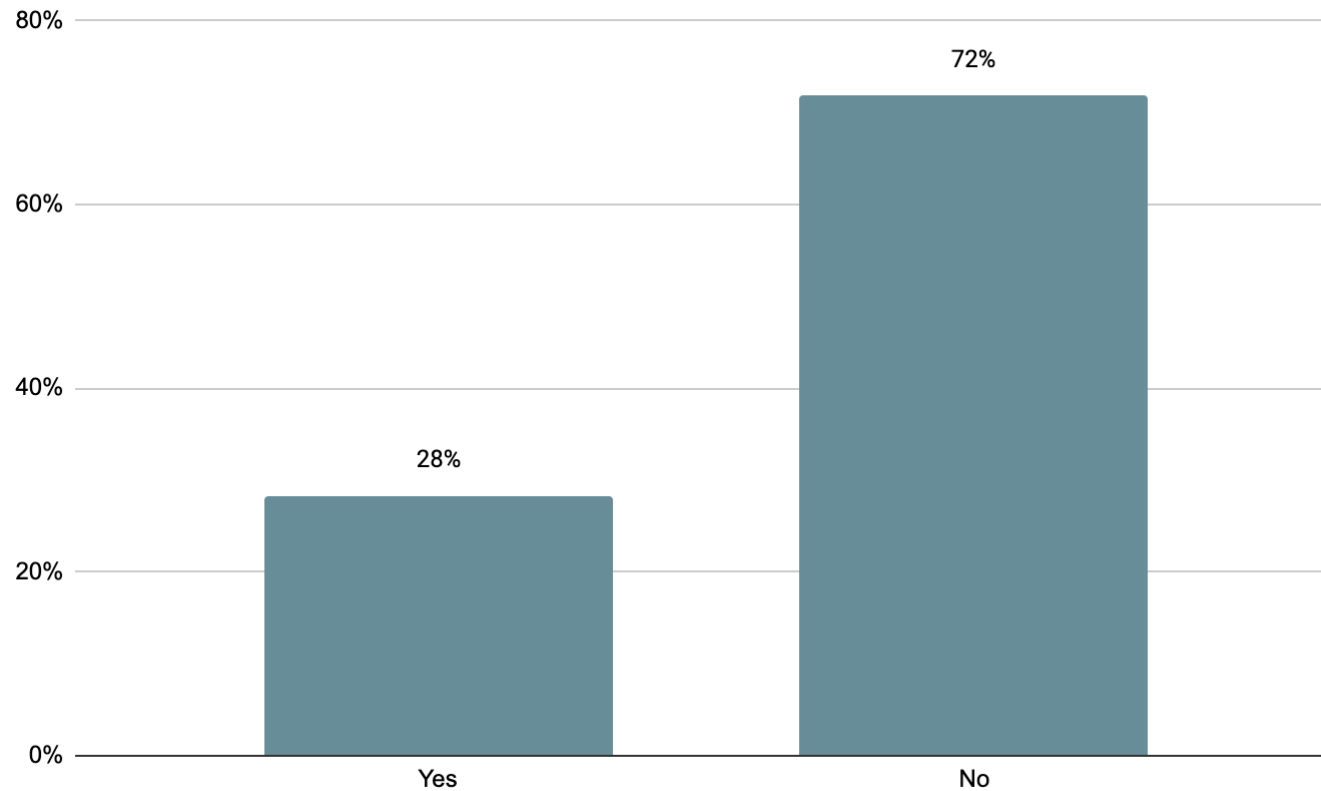


In your opinion, how does the public view Utah lawyers?

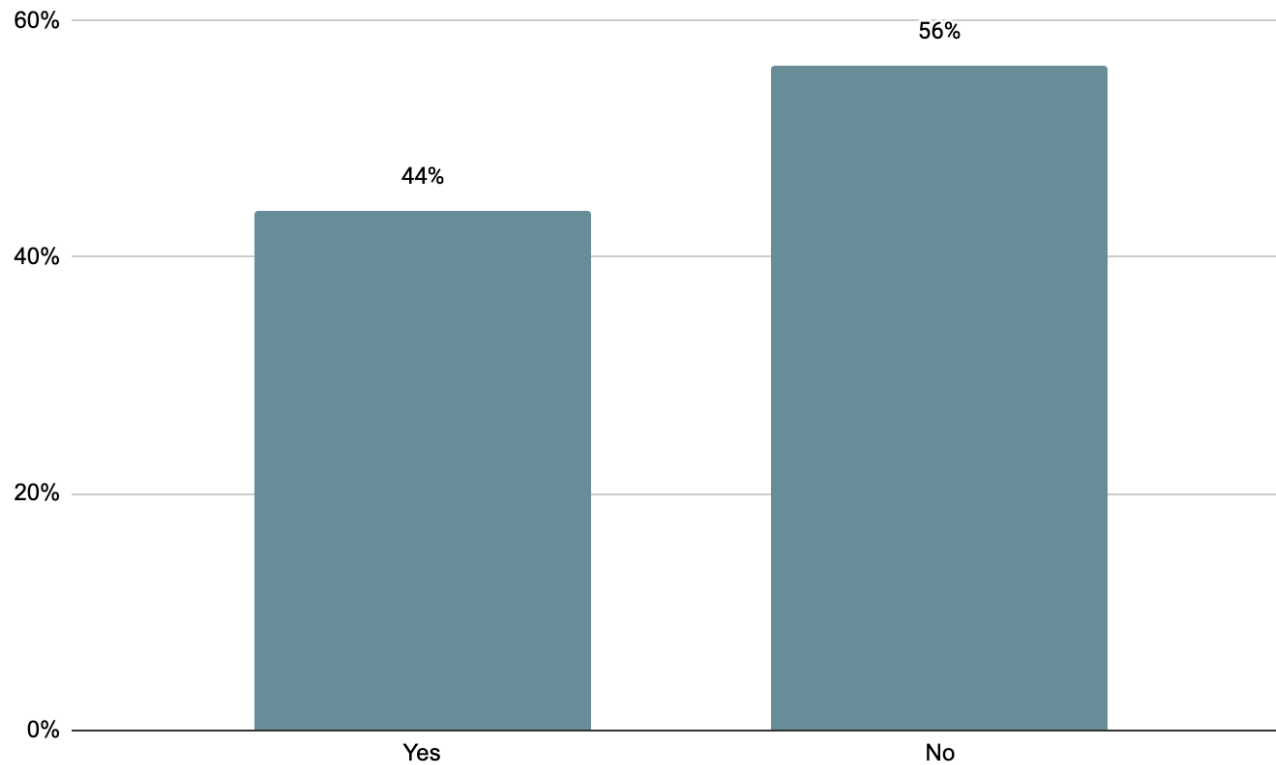


The Utah Work Group on Regulatory Reform has recently released a report called **Narrowing the Access-to-Justice Gap by Reimagining Regulation.**


Are you aware of this report?



Have you read the Narrowing the Access-to-Justice Gap by Reimagining Regulation report?



Advertising



In 2011 the most common way to advertise services was in the Martindale-Hubbell Directory. In 2020, the most common way to advertise is through digital online advertising.

The majority of survey respondents said their firm/office advertised its legal services in the Martindale-Hubbell Directory in 2011. In 2020, online digital advertising is the most common way offices/firms advertise.

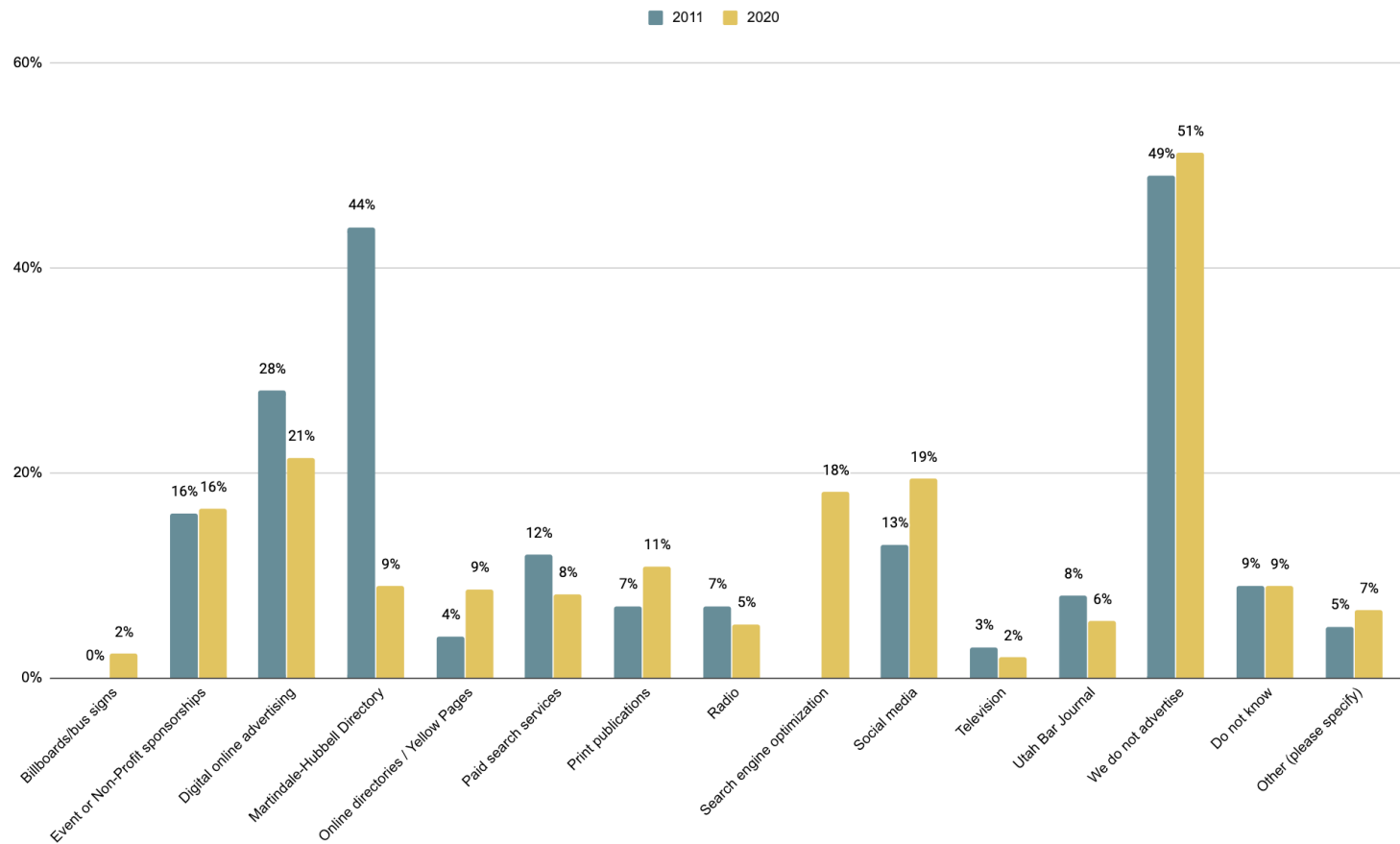


One-third of survey respondents say they allocated 0% of their office's budget for advertising in 2020.

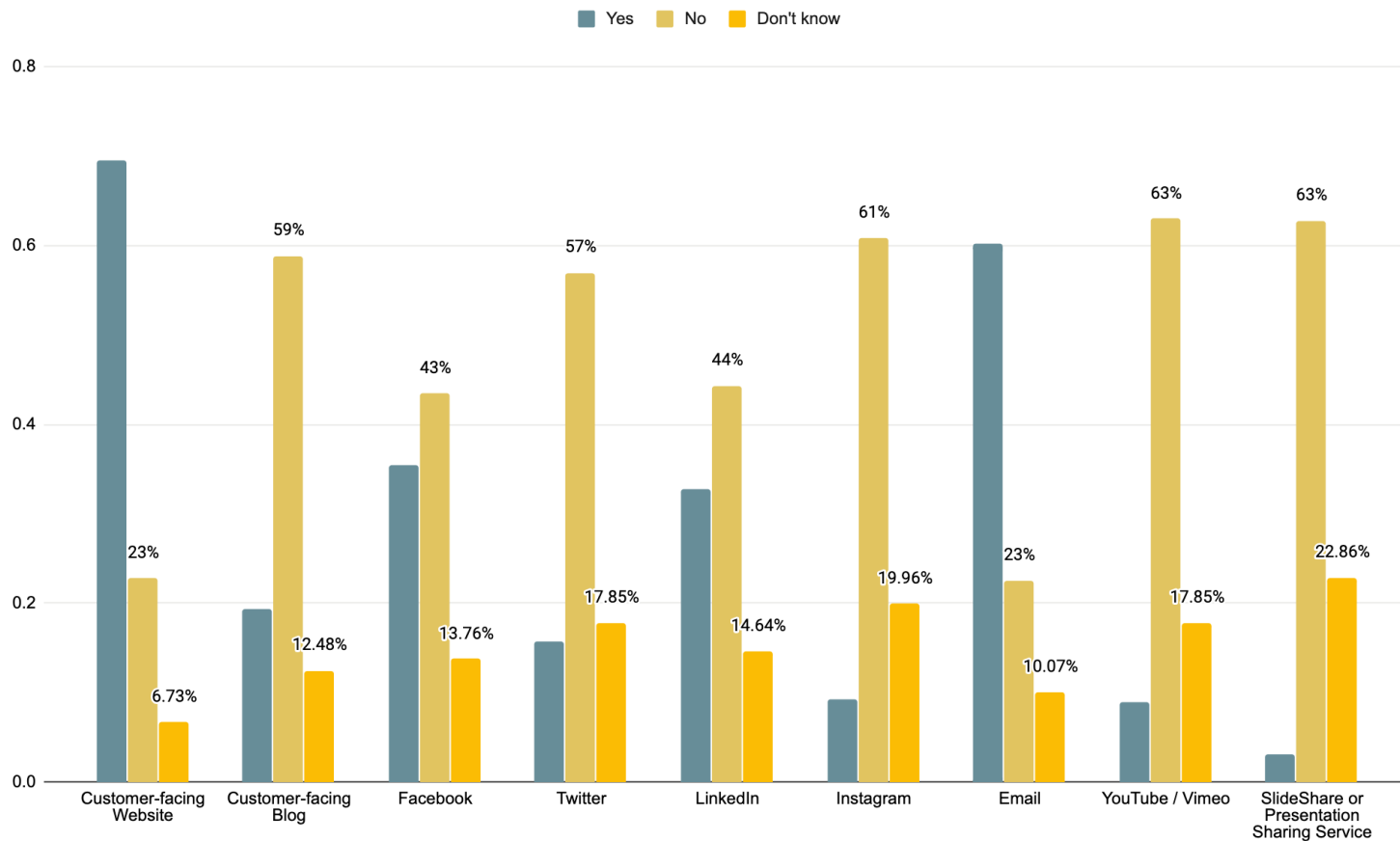
34% of survey respondents say 0% of their office's budget is spent on any advertising.

How does your office advertise its legal services?

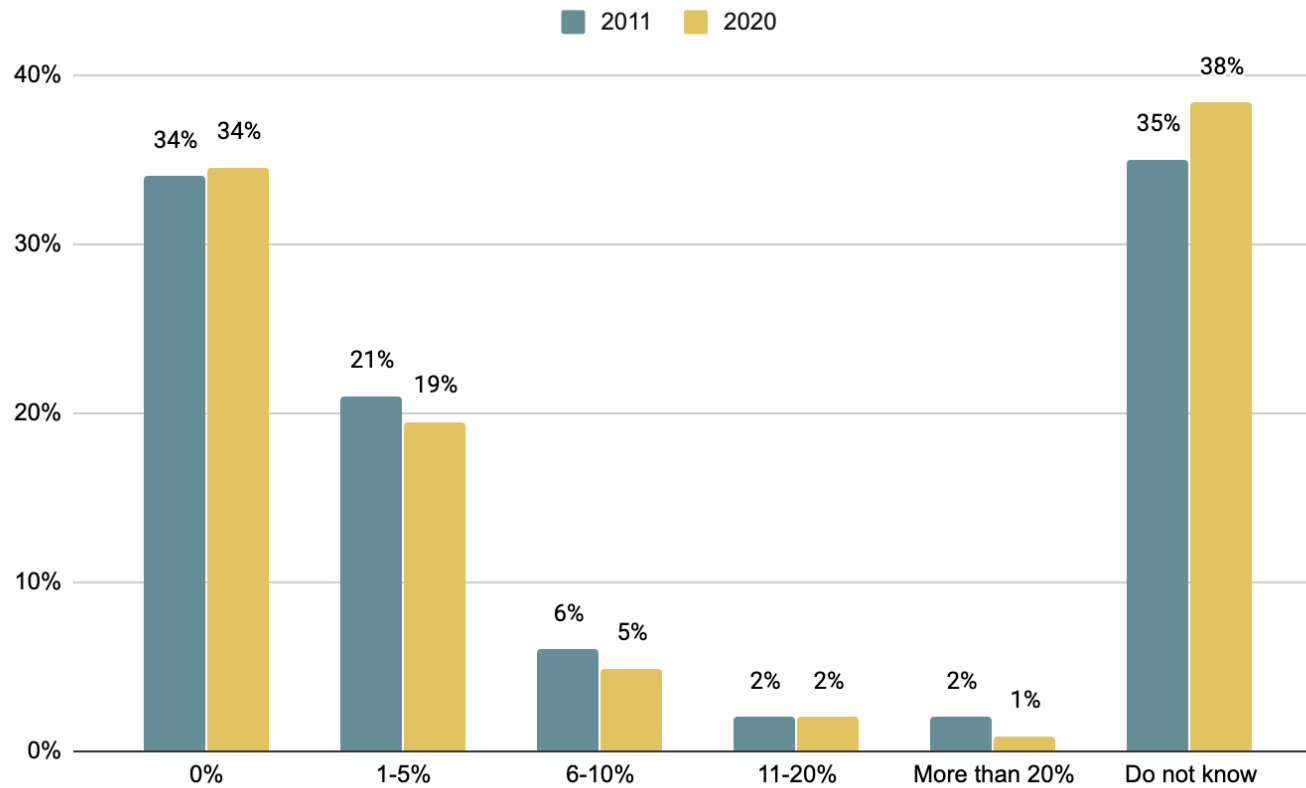
Please select all that apply.



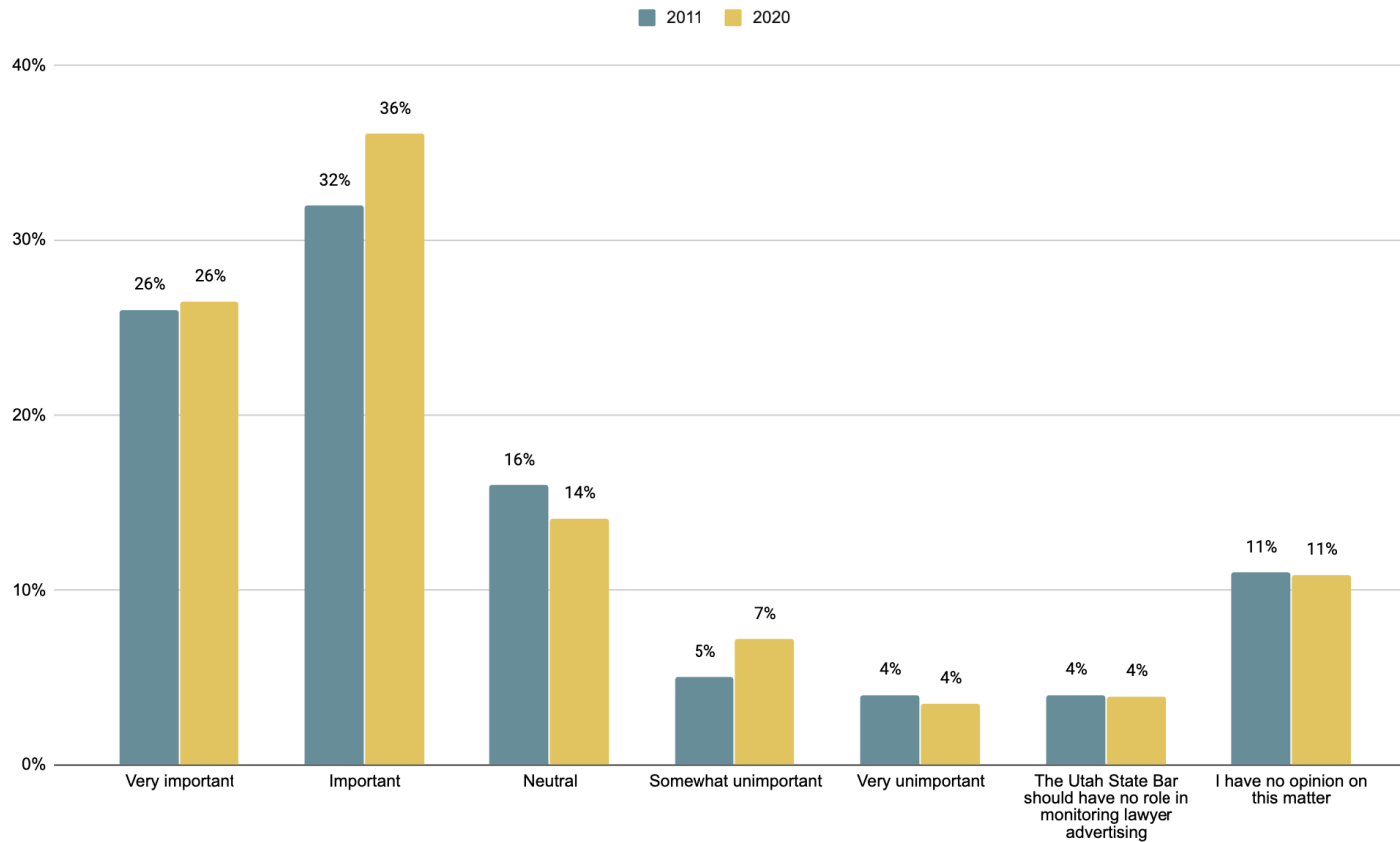
Does your office maintain a firm or office presence (other than as individual lawyers) on the following web-based media?



What percentage of your office's budget is spent on advertising?



In your opinion, how important is it that advertising of Utah lawyers is regulated in order to ensure compliance that such advertising complies with the requirements of Professional responsibility or is not misleading to the public?



Other Questions

Question 6: Please indicate your religious preference, if any.

- None
- UCC
- Nondenominational
- Christian
- pagan
- traditional protestant (Presbyterian)
- Protestant
- Protestant
- It's complicated - all, some or none of the above.
- Non-denominational Christian
- None
- none
- Presbyterian
- Presbyterian
- Christian
- Lutheran
- Anglican
- Unitarian Universalist
- I don't consider myself a member of any particular religion. The challenges stem from the fact that I am not LDS.
- Pantheist
- None
- I have none, but when I lived in NY, because I wasn't Jewish and male, I was overlooked.
- Protestant
- None
- Presbyterian Church
- Irreligion
- Greek Orthodox
- Lutheran
- Christian
- Non-Denominational Christian
- Christian
- Be patient, be kind, help whenever you can, don't hurt animals or sentient creatures
- None
- Humanist
- Unaffiliated
- Deist
- Even in the context of demographic information, it is difficult to see what possible basis the Bar has for seeking this information. This question is inherently offensive.
- Spiritual
- No Religion
- Lutheran
- None
- Eastern Orthodox
- non-denominational Christian
- Christian
- Greek Orthodox
- Christian
- Christian non-denominational
- protestant
- Spiritual non-religious
- Christian
- General Protestant
- Armenian Orthodox
- No preference stated.
- Lutheran
- Pagan
- Lutheran
- Lutheran
- Raised LDS; still go because spouse wants to go.
- Atheist
- non-denominational Christian
- Non-denominational Christian
- Presbyterian
- spiritual/non-religious
- Unaffiliated
- Bahai Faith
- No idea
- Catholic/Jewish
- Mormon
- Centers for Spiritual Living
- Unitarian
- Christian deist
- Lutheran
- Presbyterian
- Christian
- unitarian
- spiritual but not religious
- Mainstream Christian
- Orthodox
- Christian
- Lutheran
- Unconcerned
- I believe in a higher power, but not a specific religion. Although not rising to the level of discrimination, I do believe that the Utah Legal System, including in Salt Lake City, values favoritism over substance in many instances.
- Community of Christ
- I'm not religious
- Orthodox Christian
- Taoist
- Christian
- Lutheran
- Non-denominational Christian
- Nonreligious

- I don't need a middleman for my soul.
- None denominational Christian
- Christian - Protestant
- Christian, but the includes is not being Mormon here in Utah
- Seventh-Day Adventist
- none
- Generally Christian
- No religious belief
- Pantheist
- Stoic
- Unitarian
- Unitarian
- Christian
- Non-affiliated
- Eastern Orthodox
- Seventh Day Adventist
- Letsism

- I study the LDS religion, but am not counted as a full member
- None
- LDS Universalist
- Christian
- Greek Orthodox
- Not affiliated with a religion, but not agnostic or atheist
- None
- Free-range Mormonish
- None
- Unitarian Universalist
- orthodox
- Lutheran
- Greek Orthodox
- Presbyterian
- I believe in God and Jesus Christ as a Savior
- Orthodox Christian

- Eclectic -- Episcopalian, LDS, Catholic, Buddhist, Jewish beliefs / practices
- non-denominational Christian
- Lutheran
- Lutheran
- Unitarian
- Post/Ex-Mormon
- I don't have a preference.
- Non-denominational bible based
- Spiritual
- United Church of Christ
- Lutheran
- Christian
- Poly-religious
- Complicated
- LDS
- Christian

Question 10: If you are working less than full time as a lawyer is it because of: Please select all that apply.

- Recent medical/health issues
- reduced demand for services
- Substantially retired
- living outside of Utah, not licensed where I live
- Semi retired
- Service Mission
- Lack of funds/knowledge for adequate marketing.
- Of Counsel with RBMN (mostly inactive, but still connected)
- No work
- Lack of clients
- Had a stroke

- I teach part-time at a university. That is enough for me.
- It is difficult to fit in and find appropriate work because I am not mormon and because I am a woman.
- Semi-retired
- Lack of work opportunities
- I own a very successful factory that takes most of my time.
- semi retired
- Judge
- Raising children
- Judge

- Not enough of the work I do.
- Preparing to retire.
- Need more work
- semi-retired
- retirement age
- Inhouse compliance manager
- Skiing, grand kids
- I am a judge
- Full-time job in non-legal position
- moderate to low income clients cannot afford counsel and use legal defender, wealthy clients go with a big firm and waste their money but their choice, so not a lot of clients out there.

- Due to disability, cannot work in litigation / court setting (can't stand long). Have to work in document review since hours are flexible.
- Retired
- marketing
- Mostly retired
- Lack of funds
- Volunteer work
- Disability
- not getting enough work
- recovering from stroke
- age
- lack of clients
- Research and writing local Utah/Arizona histories.
- Disability
- semi-retired
- retired
- Retired from courts
- Lack of decent jobs for lawyers
- Retired, doing nation wide consulting part-time
- Raising my children is my priority
- After 40 years of practice, half-time is just about right for a quasi-retirement
- Retired
- Difficulty finding full-time work
- Choice to enjoy more leisure time with family
- Can't find full time job
- Semi retirement
- retired
- Mostly retired
- retired
- publicized bar complaint that was unfounded
- Manage attention deficit disorder
- retired
- Retired doing only pro bono and small transactions
- I can't focus 40 hrs/week
- Temporary lack of work.
- Elements of my job are not strictly in the

- practice of law
- My spouse has a very demanding job and in order for our young children to receive the care they need, I am the parent who stays home.
- I'm a part time Justice Court Judge
- Few employment opportunities upon graduation has required a two income family. Legal jobs are not competitive in pay as compared to other professions with much less education (especially necessary benefits -healthcare). After some years at low paying legal jobs I am just starting to build a book of business that requires closer to full-time hours. Risk reward has always favored practicing as an independent.
- By choice
- Working as close to full time as I can find.
- I work 30 hours/week at the Utah State Bar. In my own solo practice, I am a Guardian ad Litem in District and Juvenile Courts
- No one will hire
- Semi-retired
- Working for a Corporation - not as an attorney
- Other full-time employment, practice law on the side
- Semi-retired
- Age and personal preference
- Church service
- lack of cases
- Caring for adult disabled child
- partially retired
- Lack of job opportunities
- Desire to pursue service activities in legal community
- lack of legal work
- Want to work part time to pay for health care prior to retiring
- Working from home as full-time parent
- Lack of marketing
- Insufficient funds to study for and take the he

- patent bar
- Business Executive
- Semi-retired
- Lack of work
- Partially retired.
- Semi-retired
- partially retired
- semi-retired
- I'm a judge
- semi retired
- Cutting back to full retirement
- I am working full-time as a judge.
- Difficulty attracting quality, new clientele
- Laid off and looking for full-time work. Not many opportunities for my practice area in Utah.
- to match child's school schedule
- Part time as general counsel for an international energy company and part time as vice president of the company.
- tired!
- Lack of sufficient work.
- Insufficient available work
- Retired
- part time lawyer, part time other work
- Management
- Age
- Judge full time
- Would like supportive full-time work but unable to find positions
- Retired; CLE too expensive
- Child with severe special needs to care for
- Family commitments
- Semi-retirement due to age
- Working as associate editor in position that requires me to be licensed, but no representation of clients
- Moved out of Utah
- Na

- works best for our family
- Not applicable
- Couldn't find a legal job. Found employment elsewhere and started own law firm on the side.
- Mental Health
- Full time work in an executive position
- Dual practice Estate Planning/Financial Services
- Semi-retirement
- cost of malpractice insurance
- mostly retired
- Had a baby last year and want to primarily be home with my child
- I work part time because I want to be a stay at home parent for the majority of the time.
- pre-retirement
- lack of quality legal jobs
- Mostly retired.
- only receiving legal assignments 1/4 of the time from my employer. 3/4 of my work is policy work
- Semi retired
- The Utah legal community, especially judges, are a bunch of arrogant assholes.
- Retired
- Unable to find legal work, presumably because of age.
- mostly retired
- Left legal career
- Semi retired and loving it
- Many reasons. Lack of alumni network. Lack of lucrative paying jobs. Too competitive. Economy for legal jobs is terrible. Talents not valued in current legal culture.
- Looking for work
- Reverse discrimination
- retired and doing only pro bono legal work
- Homemaker
- Lack of work
- I don't have to work except for the few clients I want to serve
- Retired
- Alternative career path taken

- lay offs
- Na
- Disability
- I want to spend time with my small kids.
- Also stay at home mom
- Disability
- I am currently a judge
- Inability to obtain full-time employment in the practice areas I have expertise
- Too many lawyers in the profession and not enough quality jobs
- Retired.
- Transitioning to new job
- Judge
- moved away from Utah
- I can't find an entry level legal job that pays anywhere near as much as my non-legal job.
- Volunteer activity in legal matters
- semi-retired
- I am a judge.
- Taking care of elderly parent
- Retired
- Not enough cases, too many non lawyers are taking business
- Retired but do Volunteer legal work
- Partial retirement
- Terrible legal job market and low pay in Utah
- semi retired
- I was a federal attorney; the department for whom I worked as an attorney (USDA) no longer has an office in Utah. I wanted to stay in Utah, so I moved to a non-attorney position with the USDA Forest Service.
- Retired
- easing into retirement
- Mostly retired
- retired
- Senior district court judge
- Semi-retired, legal work is for family or personal interests;
- Retired

- City Manager
- et
- Performing pro bono work for my church but would consider some part time paid work if it was available
- retired
- I want to be there for my kids because no one can replace me as their mom.
- In-house counsel, and President of a Corporation
- I don't want to and I have enough savings to not work
- Job Assignment not specific to being a lawyer
- retired
- lack of work
- Health issues
- Difficulties inherent in starting a practice and trying to be slightly available for family.
- retired so limited part time
- semi-retired by choice
- Hard to get new clients at my age
- Judge
- retired, partly because of health issues
- I am a full-time district court judge.
- retired
- I hated the job. Very unsatisfying
- I don't want full time retirement
- Not enough jobs for attorneys
- working with Spendthrift Irrevocable Trusts
- Trying to find work that is possible with 6 kids
- I am a part-time professor and part-time practitioner
- Company budget
- I am a full-time judge
- Management of business enterprises and properties

- Retired
- Retired
- currently seeking to be barred in new state
- Disability
- Health issues
- retired
- Thirty years of chronic fatigue syndrome
- trying to retire
- Retired
- Mostly retired
- N/A
- Semi-retired
- I have an autistic son who needs a lot of assistance.
- Working full-time, but not as a lawyer
- health, opportunity, the boys' club
- Full-time work in government with part-time legal side job
- I work full time

- In Between projects
- Seeking employment.
- By choice: Partially retired.
- Retired
- I work part time because of age and choice
- To help care for my wife, she has brain cancer
- Retired
- Retired
- Not enough work
- Retired
- I have other work.
- Lack of jobs
- Working was getting in the way of my free time.
- Judge
- N/A
- Retired, working part time
- Retired
- even though clients are plentiful, most of mine do not have the means to pay their agreed to legal

- fees
- Lost clients caring for critically ill spouse over twenty plus years
- Lack of work
- I am a practice manager for a medical practice but do all their legal work too
- Work as contract attorney because I needed flexibility while going through some personal matters.
- Transitioning from paralegal to attorney in the same firm has proven difficult. I do lawyer work when it's "convenient" to my bosses
- Retired
- personal issues including a stroke
- Unemployed
- In government, but not doing legal work.
- Health issues

Question 11: What size / type is your office?

- non-profit
- Banking/Collections
- working remotely
- Banking
- I have 81 employees at my manufacturing facility. I am CEO.
- Fortune 500 financial services
- Education
- Working for large corporation
- Had to close solo practice due to disability and clients not paying. Current employment is not technically a law firm but document review center.
- Retired
- Thousands, mixed lawyer and non
- Public Defender Juvenile division and child welfare parental defense

- Law School
- nonlegal
- Nonprofit
- I only work occasional pro bono cases
- retired
- Solo
- retired
- risk for a company
- Religious non-profit entity
- Non-law firm business environment
- The Utah State Bar has about 35 employees, and in my own legal work I am a solo practitioner.
- Corporate office
- Chief Risk Officer
- Warehouse
- Private company with 1 in-house lawyer

- Legal Services (Nonprofit)
- philanthropy
- Court Contract "Legal Consultant"
- Retired
- Disability advocacy group
- Retired
- retired
- Software Company - not a firm
- non-profit
- 12 lawyers working as editors within company that produces products for lawyers
- Currently unemployed
- Work for an insurance company in a quasi legal role
- Not practicing

- CPA Firm
- Public Defender
- Business
- Research lab
- In House
- Document review mill.
- non-practicing attorney
- N/a
- University
- retired and working from home part time
- Retired
- Consulting
- Not employed
- Not currently practicing law
- Family Office
- Nuclear Power Plant
- I do not practice law. My current job is in

- government.
- retired ALJ doing mostly consulting and teaching
- Higher Education
- I am the only licensed attorney that works in my building of 100+ federal employees. My job title is not lawyer/ attorney, though those skills are useful in my position.
- See answer to last question.
- Currently unemployed
- Retired from county attorney
- Might be considered in house to work for only my church
- no office
- Real Estate office. No lawyers
- retired
- retired
- Non profit

- Not working in law firm.
- retired
- Not a law firm
- Unemployed
- Retired
- Retired. Until retirement, I worked in state and local government law offices.
- Na
- Law school
- Retired
- Attorney and practice manager for a medical practice
- In-house compliance
- Contract attorney
- Not practicing
- Public Defender

Question 12: What position do you currently hold?

- Professional Corporation- President
- Educator
- sole practitioner
- Solo Practitioner
- AVP Asset Sales
- contract employee
- Solo Practitioner
- Managing Member
- Banker
- Owner, PLLC
- Independent Contractor
- Public Defender
- Owner of solo practice
- solo
- Owner
- Lawyer
- Semi-retired
- I work for other attorneys on a contract basis
- federal employee

- Risk Management similar to in-house lawyer
- Legal researcher
- CEO, Board Member...
- Title company owner
- Contract attorney
- solo practitioner
- solo practitioner
- Administrator
- Elected
- Solo
- Senior compliance mgr.
- Owner
- Program Chair
- Attorney
- Land Manager
- Current employer is not a law firm but a document review center, where I am a "Review Attorney".
- Government Administrative/General Counsel

- Position
- Part-time solo pursuing educational objectives
- Court Administration
- Managing Attorney
- attorney in solo practice
- Solo practitioner
- founder but now working as an associate
- lawyer
- solo practitioner
- Publications Manager
- owner
- Director
- Managing Attorney
- Director
- Director
- Director of Corporate Compliance & Ethics
- Main job does not require a law license

- Retired judge
- Owner, sole shareholder
- Corporate Counsel
- Financial advisor to municipalities
- Attorney - self-employed
- Retired
- Solo part time mediator
- Owner/Attorney
- Owner
- Solo practitioner
- Manager (employer is Big 4 Accounting Firm)
- Government affairs
- I'm a solo and owner of my firm. I have staff but I only use contract attorneys in addition to my paralegals and assistants.
- Public Defender
- risk manager
- Administrator
- Senior Vice President
- Manage a municipality and handle various legal tasks as necessary
- Solo practitioner, Consumer Assistance Program Attorney at the Utah State Bar
- Attorney (non partner, non associate, non of counsel)
- Senior Deal Desk Analyst
- Director of Licensing & Compliance (Division Director)
- Solo Practitioner
- Sole Practitioner
- Managing Government Lawyer
- Consulting
- Solo
- Executive Management
- Staff Attorney
- I do limited, mostly pro-bono work when I choose as sole practitioner
- Occasional cases
- Compliance Specialist
- Associate/ Contract Attorney

- Staff attorney
- Solo practitioner
- Warehouse associate
- Sole Practitioner
- self-employed
- Local Government Attorney
- Executive Officer (command cadre position in U.S. Coast Guard)
- Compliance
- solo practitioner
- owner
- Semi-retired law professor
- Vice President
- compliance officer
- child welfare policy attorney
- Owner of a solo practice
- Solo
- Senior Assistant General Counsel
- Staff attorney
- Executive advisor
- Corporate Manager
- Attorney
- Sole Practitioner
- Executive Director
- Trial Attorney
- Guardian ad Litem Attorney
- Legal Consultant to Utah Courts
- Solo Attorney
- Owner
- Retired
- solo practice
- Senior Staff Attorney
- Counsel
- Owner
- Attorney owner
- Director of Legal Content Development
- Owner/Solo Practitioner
- Compliance
- Owner
- Associate editor

- Owner/solo practitioner
- Claim consultant for insurance company
- Attorney. self-employed
- Contact atty for opioid litigation doc review
- President
- just me and my secretary.
- Business executive
- Solo
- Self-Employed Sole Practitioner
- Independent contractor
- Senior judge
- General Counsel, Chief Legal Officer
- owner
- Head of product development
- I mostly mediate. Occasionally I prepare some legal documents. But mostly I am not practicing law
- Owner
- solo
- Part time arbitration practice
- Compliance officer
- Employed in non-lawyer government position.
- Retired
- Reviewer of legal documents.
- Government administration
- home, mostly retired
- Judge advocate
- non-practicing
- Part time research and writing attorney. Full time customer solutions rep at Vivint Smart Home.
- Retired
- Manager of Academic Policy
- N/a
- Single Member LLC
- Deputy
- Business role and part-time lawyer

- Solo
- Managing Attorney
- 95 percent retired
- Environmental
- oversee document review
- owner
- Owner
- Sole Practitioner
- Solo
- Solo Practitioner - Public Defender
- Retired, but still authorized to practice.
- Non-legal career field
- Prosecutor
- Sole practitioner
- business management with some legal
- Managing Attorney
- Buyer/Analyst
- I work full time, but I don't have a job in law.
- A County Attorney, a Private Practice, a Consultant, Ex. Director of a Law Enforcement Association
- Juvenile Public Defender
- Mr. Everything
- Manager/owner
- Senior Judge
- Investigator
- City Administrator
- Federal bureaucrat. Water Rights.
- Retired
- Sole Proprietor / Owner
- CEO
- Solo
- Senior judge
- Semi-retired, sole practice on personal interests;
- City Manager
- Contact attorney
- Corporate President
- Tax Commissioner
- I am the lawyer! Head of my office of one.
- Managing Attorney
- Quasi-judicial decision maker
- owner

- Prefer not to say
- Owner/Attorney
- retired
- sole practitioner
- Public Administration, Management
- contract public defender
- Staff attorney
- Sole owner
- Owner/President
- solo work
- owner
- Owner
- Solo practitioner
- Government leadership
- Solo
- Hearing Officer
- Commercial Real Estate Agent
- retired
- Part time solo solo practitioner
- Government Administration
- Extern, no pay
- Assistant Solicitor General
- Solo Attorney
- planner
- Sole practitioner
- Solo lawyer
- sole practitioner
- Project Manager
- Public Defender
- Prosecutor
- Sole lawyer in my law office.
- Public Defender
- Self-employed
- Solo
- Admin Hearing services to muni govts
- sole practitioner
- Doc Review
- Manager
- Not a law firm
- Self employed
- Solo
- Mediator

- consultant
- Self--private representation.
- Trial attorney
- Retired
- Owner
- Independent contractor
- Product manager
- Associate Librarian, Adjunct Professor
- Lawyer
- Director of managed review
- I am my own boss, so I guess it would be owner
- solo practice
- Solo part time practitioner
- Owner of solo practice
- Public defender
- Owner/operator
- Education-Professor
- Retired
- solo practice attorney
- Solo
- Self employed
- Owner solo law firm
- Contract Attorney
- Staff Attorney
- State Agency Commissioner
- CEO
- Compliance Officer
- Paralegal / Associate to Partner
- Contract Attorney
- CEO
- Senior Attorney
- Attorney and counselor at law
- Deputy Public Defender
- Owner of solo practice
- Assistant General Counsel
- Solo Practitioner
- solo practitioner

Question 15: What area of practice represents 50% or more of your practice in the last year?

- Energy Natural Resources
- I don't think that any one area describes what I do 50% of the time. Maybe criminal.
- Trust and Probate Litigation
- False Claims Act/qui tam litigation
- Natural Resources
- Estate and Trust Administration
- Child Welfare/Juvenile Law/Family Law split
- Environmental
- Asset protecting
- Native American
- not practicing
- Environmental
- Disability
- Arbitration/Mediation/Appellate
- Federal litigation
- Civil research
- Tax Law
- Environmental Litigation
- judge
- Health care (regulatory and administrative, NOT malpractice)
- transactions, mining, oil and gas
- State and Local Tax
- M&A tax law
- Filings with court in all areas of law
- Mining oil and gas public land
- I am an educator.
- Victims' Rights (Plaintiff)
- Corporate non-legal
- Environmental
- Cases the document review have dealt with involve Hatch-Waxman, Anti-trust, and various other civil litigations.
- Didn't take any cases this year
- Securities
- Environment/Natural Resources
- Consulting lawyer to lawyer re Appeals
- In house supporting a business unit on an array of issues
- Practice varies significantly
- none
- Health
- Financial and Health Benefits
- Public Lands / Natural Resources
- Tax law
- Tax
- Estate Fraud
- Tax
- pro bono mixture
- Property Tax
- Tax
- Community association law
- National security
- General litigation
- Tax
- More than 50% probate and trust administration and protective proceedings
- Health care law - representing doctors, surgical centers, nursing homes, surgeons, Medicare, HIPAA, fraud & abuse
- Product Regulatory
- Government affairs, regulatory
- Non-party discovery dispute
- risk manager healthcare
- N/A
- None, business activity
- No practice more than 50%
- Workers compensation
- Not applicable
- Enterprise Contracts
- Federal Indian Law
- Environmental
- Health law
- Environmental
- oil and gas
- No one area over 50%
- Native American
- tax
- Workers Compensation
- No area of practice represents 50% of my work
- health law
- None, currently
- Natural resources & environmental
- Privacy / Information Security
- Arbitration and mediation
- Gaming Law - practice outside of Utah
- General Civil
- compliance
- Federal tax
- Law Clerk work
- Franchising
- life insurance
- Public Lands / Natural Resources
- Public Finance and Tax
- None is over 50%.
- Retired
- Retired
- in-house - compliance, HR and employment, contracts, managing outside counsel litigation.
- workers compensation
- Civil litigation in a variety of areas
- post-conviction
- Currently unemployed
- Not practicing
- Energy
- Tax
- Asset protection
- Environmental
- Tax
- Data privacy
- mediation domestic and civil
- Environmental
- Natural resources
- Document review (discovery); mostly civil cases.
- None

- Retired
- Technology (contracts, IP, strategic)
- N/a
- Natural resources
- Victims rights
- Conservativship
- Retired
- Environmental
- Natural Resources
- General Civil Litigation
- Environmental
- general civil litigation; subrogation
- Not currently working as a lawyer due to poor job prospects
- n/a
- Native American law
- Collection Law
- 20% criminal, 25% consultant, 25% Association Director, 30% civil
- Veterans Law
- Community Associations (HOA) Law
- employee benefits
- Retired
- Consumer Law
- Nothing listed applies.
- hoa
- environmental and natural resources
- Tax
- Energy
- I only helped people that could not afford an attorney
- tax
- Receivership
- Environmental
- None
- Natural Resources
- retired
- INDIAN law
- Workers' Compensation
- Tax
- attorney mal defense
- In house

- Environmental
- Judge
- Privacy
- Federal firearms laws
- Natural Resources
- none of these constitute more than half of my practice
- Tax
- Public finance
- N/a
- Tax
- General commercial litigation
- Medical malpractice
- Tax
- securities
- Tax
- Enforcing sanctions
- Natural Resources
- Securities
- Judicial Ethics
- Not practicing.
- litigation
- Government Relations/Lobbying
- Procurement
- Environmental
- Tax resolution
- Document Review
- Private equity funds
- Not a law firm
- Policy
- Workers Compensation
- All
- Retired
- Policy
- Tax
- No single area listed represents 50% or more of my practice. Real Property, HOA, Estate Planning, Probate, Contracts, Construction - in more or less equal parts
- Na
- General litigation

- Franchise
- Healthcare
- Ethics
- Property Subrogation
- Litigation
- Retired
- tax
- Employee Benefits
- Consumer Financial Services
- Tax
- Rather not say
- None is more than 50%
- Natural Resources
- N/A
- Nothing is 50%
- HOA law
- Unemployed
- Donations
- Workers Compensation
- Tax controversy

Question 23: What billing methods have you used this year (by percentage of your practice)? Please select all that apply.

- hourly (but funding comes through grants)
- In-house
- Salary
- NA
- in-house
- salary
- Limited Scope Flat fee. Adoption Flat fee (DCFS reimbursed).
- N/A
- None of the above
- N/A
- In house
- Government
- salaried
- I work in house
- N/A. In-house
- N/A
- I don't bill for my services. I'm a salaried employee.
- In house attorney
- Appointed as public defenders for Utah county
- government
- No billing. Government
- Not Applicable-In house
- Government
- n /a
- General Counsel
- none
- Non-profit, no fees charged to eligible clients
- Salary
- Not working currently
- Salary
- Discretionary
- None. Gov't atty
- I receive a salary but do bill my time to my client agency but am not sure what they see for rates.
- non-profit, public interest. we don't charge our clients.
- not applicable
- Not applicable. Government office which does not bill.
- Our services are at no cost to clients
- Just by the hour, timed.
- I don't bill. I am like an in-house lawyer
- Salary
- salaried
- government
- Judge
- In house council and owner....my income is not based on any of these scales
- We are staff attorneys, so no billing
- Unbundled/Limited Representation
- We don't bill
- Salaried
- None
- judge
- I work in the Government. We don't bill clients.
- Government Attorney
- Government attorney
- Do not bill
- Judiciary
- Salary
- Public defender office. We don't bill clients.
- Contract flat fee with county
- none
- Government Salaried
- I work for government so I don't bill like that
- n/a
- Gov't work, no billing
- government lawyer - salary
- blended rate
- government salary
- N/A
- Do not bill clients
- n/a
- in-house, don't bill
- None. Government attorney.
- Government - hourly wage
- In-house
- In house
- Public Defense
- non-profit so we don't charge clients
- no billing
- Retainer
- contingent with reduced hourly rate
- N/A
- I don't bill
- none
- indigent defense
- N/A
- salary
- N/A- Government
- I don't bill. I am a salaried employee.
- government attorney salary determined by Congress
- No billing (government lawyer)
- Because I've had to only work in document review, I'm not billing clients personally.
- government lawyer - no billable hours
- I do not bill for my work.
- House counsel - I don't bill
- As a government attorney, I don't bill.
- In house
- I don't bill
- government attorney
- Fees are not charged

- In-House
- Do not bill for services
- Set salary. No billing.
- i am a salary paid attorney with the public defender
- Non legal
- None
- I have an "in-house" role
- Default Attorney Fees per Rule 73
- NA in house
- employed by an agency; we do not directly bill clients
- I do not bill. In-house counsel.
- Salary, i do not bill
- No billing
- County funded
- This charity cannot charge fees
- I don't do any billing
- I'm a judge. I don't bill my time.
- in-house counsel, no billing
- Do not bill. In-house counsel.
- In house - don't bill
- Not applicable
- no legal work
- No billing: government
- Not Applicable
- Based on budget set by legislature
- Non-profit - no fees
- I am a judge
- In-house salary
- NA
- We don't bill - in house counsel
- No billing
- No billing--govt practice
- staff attorney for insurance company
- I do not bill for my time - nor do our other attorneys
- I only work pro bono
- Salaray

- Public Defender Office - Gov't Contract (Fixed budget)
- Various
- Hourly Billing but clients can many any adjustment, no questions asked.
- pro bono
- Free legal aid only
- Government -Paid hourly
- No billing. Government
- No fees charged. Nonprofit clinic providing free consultations and support.
- I don't bill
- Salaried
- Salary
- Government, I don't bill
- Project based
- I am a government employee and do not bill clients.
- none -- salaried government employee
- N/a house counsel
- Govt
- I'm on salary
- Government
- In-house attorney
- Govt employee. Don't bill
- Salaried in-house employee
- no billing - company allocates cost and time
- None
- NA
- Government law office
- Not for profit
- I don't bill
- Non-profit, free legal services but track time as if hourly
- does not apply
- paid through agency budget
- Salary
- N/A
- Combo of flat and hourly depending on case

- dynamics (triggers present in Engagement Letter).
- Salary with bonus structure (in-house counsel)
- Salaried
- Government Salary
- Government salary
- members dues pay for legal services
- I am a public defender and do not bill my clients but am obligated to track all my time.
- Government work - we do not have a billing method.
- County Funded public defense
- no billable hours - salary
- N/A
- n/a
- N/A
- Government Lawyers don't bill clients.
- In house. We don't keep time or bill.
- government work - no billing
- In house counsel
- N/A
- government
- salary
- None
- none
- government, i don't bill
- N/A
- in house
- None
- Government Attorney; do not bill
- NA
- As a government attorney, I don't bill for my services.
- I'm a judge
- N/A - government practice
- N/A
- NA
- Salary

- My government position requires a J.D., but not the "actual practice of law."
- Salary plus bonus
- Government
- Subscription
- In-house set salary
- Direct bill to client-agency
- we don't bill
- Salary - in-house counsel
- In-house salary
- Public defender non profit
- not applicable-government work
- n/a
- Salary based
- Salaried Government Employee
- None
- N/A
- Government attorney, we don't directly bill our client
- none I work for government
- None; offer services at no charge
- No billings - in-house
- NA
- N/A - Government
- n/a
- Public service
- Government
- We do not bill as we are a government office
- I am an elected official and do not bill clients.
- In House Compliance Attorneys receive a salary from the company.
- government- no billing Thank God!
- gov atty
- government work
- Not applicable
- Salary...work in-house
- N/A to my government practice
- None, government
- Don't bill governmental departments

- In-house
- n/a
- None - government attorney
- N/A
- Hourly rate based on position and seniority
- None - government
- I earn a salary.
- I don't bill
- Government lawyer no billing rate
- Government employee-no billing
- I am on salary
- Government
- GOVERNMENT/SALARY
- Public Defender
- In-house counsel, we do not bill
- NA government lawyer
- Salaried
- N/A
- None; as a government lawyer, I do not bill.
- None
- I don't keep billable hours for the government
- Government Law
- Government Salary
- None
- Contract with the State
- In house, don't bill
- n/a
- Free representation- Funded by Grants/Donations
- Fees are not charged
- Free legal service (JAG)
- we don't charge our clients
- I'm don't work billable hours
- Pro bono
- In-house with no billing
- In-house Salary
- Government job--salaried
- None
- Not applicable

- No billing
- Government office - no billing
- In house
- paid a salary
- In house attorney
- I am a salaried employee
- government
- NA
- Other
- Annual Salary
- Salary with bonus structure (in-house counsel)
- Contracted Indigent Defense provider
- Not applicable
- In-house salary
- in house
- Not applicable
- N/A
- None we represent clients for free (public defender)
- N/A
- Salary
- None- judges don't bill
- Salary
- I am the military equivalent of a federal public defender, no billing.
- Not applicable
- judicial
- Non-profit indigent defense
- Government attorney; do not bill
- non-profit
- Salary
- My organization provides free legal services
- Set rate
- Government Lawyer
- Legal Insurance Plan(s)
- Government
- None

- in-house salary
- Salaried in-house counsel
- Retired
- None - staff attorney
- No billing. Government attorney
- in-house
- Retired
- no billing methods. I work for a government agency.
- Not applicable to in-house. I am salaried.
- None. I do in-house work.
- I do not bill
- Government Lawyer, I don't do billing
- NA
- Salaried Government Employee
- no billing methods
- I do not bill as a government attorney
- Not Applicable
- Don't bill
- Do not bill
- County Service Contracts FLAT FEE
- NA b/c of corporate counsel - one client only!
- None of the above. I am In-House.
- I do not bill my time
- We don't charge for our services.
- Taxpayer/Legislature pays
- Government Employee - Don't collect fees
- salary
- Packages for consulting/coaching
- Billing system for the client is in flux.
- Monthly retainer
- We do not bill. Government office
- For most of the past year, I engaged in block billing for state agencies
- Sometimes awarded attorney fees under federal statute
- N/A
- salary
- government
- I manage others.
- Government Lawyer we don't bill

- Government
- salaried due to in-house position
- We're a non-profit, I'm on salary
- Work for DOJ and paid salary
- Restitution tracked and returned to government payers
- Salary
- None
- Government lawyer - no billing hours.
- Government. We don't bill we just get it done.
- Government
- No Billing Government
- Government attorney – we don't bill
- Mostly pro bono as I'm mostly retired.
- I'm salaried, so I don't charge any fee.
- Retired
- Currently unemployed
- don't work as an attorney anymore
- In-house
- salary
- government
- In house counsel
- In house I don't bill
- In house salaried with shared services agreement
- not applicable
- Gov't
- None - government
- Firm gets paid contingency and I get paid per hour
- Public defender
- None
- Salary
- Not applicable
- I am paid hourly
- Government; no billing
- salary
- None
- No billing - government
- In house. We are salaried by the company.
- N/A

- contract with the County
- I'm paid as a military officer—according to the military pay charts.
- salary
- Government attorney
- Charitable rate
- N/A Gov attorney
- Government Lawyer; no billing
- non profit
- I earn a salary
- I'm salaried and don't bill
- corporate counsel
- I don't bill as general counsel
- I work for the government and don't bill.
- None
- Salary
- In house salary
- No billing
- None: government attorney
- n/a
- Not billing
- based on clients ability to pay, time, my expertise, so forth
- Don't bill
- None
- In house salary
- Salary
- District Attorney's Office. We don't bill.
- In-house salary
- Retired
- Salary—house counsel
- N/a
- N/a
- In house
- Staff salary
- no charge for services
- Government
- Military Law
- Nonprofit. Do not charge clients
- I do not bill as I am a court appointed attorney

- None
- NA
- Fee caps
- N/A
- Salary
- Don't bill; salary
- None
- not applicable
- I am salaried
- In house (salaried compensation package) for fulltime work
- None
- government office
- None
- Gov't work
- government office - no client billing
- don't bill
- None
- Government attorney and do not bill client
- Salary
- N/A
- n/a
- n/a
- Not applicable
- No billables.
- Government work. No fee.
- not applicable
- Charity Work
- Government attorney
- Prosecution: we don't bill.
- no billing
- Salary
- Salary
- Government agency so do not bill.
- in-house: salary
- Salary
- Government office, not applicable
- No billing rate.
- N/A
- Government attorney--salaried employee
- in house...I don't bill

- NA
- Pro bono
- Not applicable
- Don't bill
- government work
- In-house work - no billing requirement.
- none government paid service
- n/a
- government work
- Do not charge for my volunteer legal work
- Salary
- annual salary
- Government / No billing
- Not applicable
- Government office
- N/A
- Government - don't bill
- I am a state salaried employee.
- government
- N/A salary
- No billing, In-house, receive salary.
- Not Applicable, Government Attorney
- private non profit
- I'm a government attorney, so I'm not certain how my agency is billed.
- N/A. Federal government
- Government
- Retired
- In house and CEO
- not applicable to government practice.
- No fees
- non profit. Do not charge clients
- When I do an arbitration or mediation I charge by the hour.
- I'm a salaried government attorney and don't bill clients.
- currently unemployed
- Government lawyer—no billing
- SALARY
- No Billing Utilized
- I don't bill anyone at this time

- work for State of Utah
- Hourly rates until I switched to in-house
- Government/ N/A
- Hybrid: discounted hourly + percentage of recovery
- in-house
- public defender, appointed to cases
- none
- Government attorney
- Not Applicable
- pro bono
- In-House Counsel, no billing done
- NA
- I do not bill
- Gvmt Salary
- government lawyer
- In-house n/a
- Salary
- In house/government
- salary as administrative law judge
- Federally and grant funded
- Government
- Non profit. Bill to contracts/grants - not to clients
- We do not charge clients for services
- Government
- none
- Not Applicable - in-house counsel
- I am salaried. We don't bill.
- I don't have clients
- in-house
- government attorney. I don't bill clients
- As a federal government attorney, I do not bill the agencies I represent.
- None - salary
- N/A as in house counsel for a nonprofit
- Government work - no billing
- we are a non-profit; we do not bill clients
- In-house. We don't bill hours.
- I don't bill

- in-house, n/a
- N/A
- don't bill my hours. in-house counsel
- Prior to retirement in 2020 I was in house
- Government employee; no billing
- Do not bill our clients
- Government Attorney - no billing
- in-house counsel - salary
- In-house salary
- N/A
- N/A
- Salary
- NA
- Salaried, in-house counsel
- None - I am a government attorney
- In house, no billing & previous job this year was gov't
- Does not apply
- N/A -- in house
- N/A - in-house counsel
- I do not bill. I am a salaried employee.
- N/A Government
- Don't bill
- In-house
- We track time but are salaried
- No billing- non profit
- nothing billed
- government office - no billing
- Not applicable. I am a judge.
- Salary
- none. government lawyer
- I do not bill.
- in house -- no billing rates
- Salary
- N/A
- Government. On salary.
- I'm not sure - government
- Salary
- public defender
- none
- I receive a salary. My company charges

- subscription prices. I do not do billing, so this question is not applicable.
- Don't bill -- government attorney
- Not applicable
- Salaried government employee
- I do not bill. I am salaried.
- No billing methods - in house
- Not applicable; government practice
- As in-house counsel, I do not bill.
- Free nonprofit services
- No fee - indigent defense
- In-house counsel, don't bill
- Not applicable.
- Don't bill (government)
- n/a. Not practicing law
- Not applicable, government office
- Don't bill anyone.
- Salary
- I don't bill
- Not applicable- government office
- In house. No billing
- Salary
- In-House attorney, no billables.
- I work for an international organization. Billing does not apply.
- No billing - government
- N/A
- I created a Spendthrift Irrevocable Trust and I am seeking clients
- Government law office. N/A.
- Don't know
- Salaried state employee
- no billing
- N/A - In house counsel
- Funded by grants and foundations
- N/A: government
- Annual salary
- active military
- Government
- In-house attorney; salary
- N/A

- in house, don't have to bill
- None
- govt employee
- salary with no billable hours
- pro bono
- None. Government attorney.
- Not applicable
- Salaried employee
- in house
- None, in-house and we don't bill departments.
- I am in house on salary
- None (government)
- Salary
- Using Marco Brown's advice
- Salaried
- Government
- Non profit
- no billing
- Government worker
- Currently a district attorney, no billing.
- Government, we don't bill at all.
- Court appointed. No private clients.
- In house counsel doesn't bill the company
- Salaried
- Na
- sucker for people who need help
- No billing
- None—government attorney
- Salary
- State employee
- Court appointed public defender
- Not Applicable.
- In house salary
- None government
- Legal Aid, free
- Not practicing
- Salary
- Salary

- 50
- I don't bill
- Government work not applicable
- Government lawyer
- Salary
- Retired
- None, pro bono
- Indigent defense
- In-house
- Retired
- Set government salary
- Salary - I am in house.
- N/A
- Na
- I don't bill
- NA
- Per document basis
- NA - in house
- I'm in house
- Government
- Not applicable
- We don't bill
- Salaried
- Salary
- In-House Counsel
- No billing. Grant funded free representation

- Government Attorney
- No billing; in-house salary
- Don't bill. Salaried.
- no practice
- Salaried government attorney
- Retired
- N/a
- Nonprofit
- Government salary
- Government lawyer, don't bill time.
- reduced rate per legal insurance providers
- nonprofit
- In-house salary
- Government (in house)
- Government
- contract
- N/a
- Thank goodness I don't have to bill - only one client for the most part
- N/A
- Judge
- Blended rate
- None
- in house
- no billing, government employee
- in house

- Public defender
- No billing. Govt
- Internal billing - government attorney.
- Government
- N/A - government
- No billing because work is performed as in-house counsel.
- In-house salaried position
- I don't have billable hours
- Government lawyer
- I'm on a salary as in-house counsel
- In house so no billing
- Government office
- I don't have billings.
- In-house - no scale
- In house counsel. Salary.
- Unemployed
- Government- no billing
- NA
- Salary
- City Wages
- Not applicable
- None
- Public defender - no billing
- NA

Question 24: What billing methods have you used this year? Please select all that apply.

- Contingent Fee only (100% of my personal injury and wrongful death law firm). As a Plaintiff Personal Injury Lawyer I get paid using a Contingency Fee pay system. However, I track my hours for self-protection and accuracy; at the rate of \$350.00 per billable hour, and charge that as a lien on a case, in the extremely rare situation that I need to do that.
- Flat Fee
- Flat fee

- n/a
- Flat fee
- Hourly and flat fee
- Contingency
- Contingent fees
- Flat
- invoice flat fee
- Flat fee - but in installments
- Flat fee
- NA

- Hourly
- Government office that does not bill.
- Just by the hour, timed
- Contract rate and contingency.
- We are staff attorneys for an insurance company, so no billing.
- CONTINGENCY FEE
- Flat Fee

- Do not bill clients
- None. Government attorney.
- Retainer
- Flat fee but I track my hours.
- flat fee
- Fees are not charged
- Retainer
- flat fee also
- hourly
- contingency
- Default Attorney Fees per Rule 73
- contingent
- Flat fee
- Non-profit - no fees
- I am a judge
- I only work pro bono
- FLAT FEE
- Hourly Billing but clients can make any adjustment, no questions asked
- pro bono
- N/a
- Social Security standard fee arrangements of 25% of recovery on back benefits capped at \$6,000 per client.
- no billing - company allocates cost and time
- Flat Fee
- N/a
- Contingent fee
- Salary
- mostly contingency, some hourly corporate
- Flat fees & subscriptions
- Contingency
- Government
- Flat fee
- Contingent Fee
- Flat fee
- Not applicable
- hourly rate
- Flat fee and contingency
- hourly and flat fee in private practice
- None; as a government lawyer, I do not bill.
- Not applicable

- Government Law
- Flat Fee
- Flat fee
- flat fee
- Contingent Standard
- Flat rate for some services
- None
- Flat Rate
- Flat fee
- Flat fee
- Contingency
- contingent fee and hourly
- Flat fee, pro bono
- Bill Quarterly for hours worked
- Retired
- Flat Fee
- Retired
- flat monthly fee with adjustment if exceeds cap or collar
- part salary, part hourly
- Don't bill
- Flat fee and fixed monthly retainer.
- flat fee for the few cases I do bill
- hourly for hourly cases, percentage from flat fee cases
- Government attorney – we don't bill
- Ditto to the prior question.
- Flat fee
- set fee agreements
- Flat Fee
- Flat Fee
- Per transaction
- Mostly Flat Fee
- mostly flat fee
- Flat fee
- see preceding other
- Flat rates
- All contingent fees
- Retired
- Flat fee
- Contingency
- Question is unclear

- Track dollars billed
- flat fee
- I get paid by the city that I provide public defender services for.
- Flat fee
- Contingent
- Insurance In-House
- Fee flat
- Up front fees and monthly payments from the Chapter 13 Trustee
- Annual salary
- Pension and hourly for part-time work
- Government / Don't bill
- composite with other independent contractors
- Retired
- Hourly
- See answer provided above.
- currently unemployed
- SALARY
- Flat fee
- Flat fee
- government attorney. I don't bill clients
- Flat fee
- Flat Fee
- contingency only
- N/A
- Flat fee
- Flat fee
- I do not bill. I draw a salary from my nonprofit employer.
- I do not bill
- Salary
- I sell trusts on a one time up-front basis
- gov agencies billed, but I am salaried
- contingency
- Flat fee
- Some flat fee work
- None
- flat fees
- contingency

- Bartering for services with a legal agreement
- Flat fee
- Retainer Agreements
- Flat fee
- flat fee up-front
- Moi
- NA
- Not practicing
- Flat fee
- None, pro bono
- Flat Rate, piece work

- Over 90 percent flat fee
- mostly waiting for clients to pay the fees they agreed to pay
- Fixed fees
- We quote in advance as much as we can. We track hours for our use, but do not represent hours on billing, only tasks and dates.
- contract
- Flat Fee
- Flat fee
- (moved from firm to gov't mid-year)

- contingency
- Track by project, not hours
- Set Fee
- Flat fee
- hybrid reduced hourly plus contingency
- Trade Services
- Flat fee
- 25% back pay award in social security disability claims

Question 34: What are the biggest obstacles keeping you from doing more pro bono work? Please select all that apply.

- Childcare
- My firm does a great deal of low bono (indigent/appointed work) which can factor into limiting the amount of fully pro bono (unpaid) work we do in order to keep balance with the fully paid work.
- I work at a non-profit so essentially all of my time is pro bono.
- Judges cannot provide legal services
- criminal prosecution conflict of interest
- People need more help than I can give. I can help with a part of things, but people often keep coming back and requesting more assistance. When people receive pro bono help, they tend to request an extreme amount of services and want me to fix everything that is going wrong, and it is hard to do some free work without people continuing to place demands on my time.
- No obstacles
- Ungrateful pro Bono clients make it not worth the hassle
- too busy

- N/A
- not creative enough to do Trust and Estates work pro bono except to donate trusts to silent auctions like Boys & Girls Club, BSA and School Foundations and Sports teams
- commitments
- I do lots of non legal volunteer work.
- Not enough time to do more pro bono work
- I have no obstacles to doing pro bono work.
- Time constraints
- Live out of state
- No time
- don't live in utah
- There are only 24 hours in a day
- semi retired
- Not allowed to practice law by representing a party.
- Time conflict
- Time constraints
- Too much on plate.
- Time availability
- Tired of doing it

- Semi Retired
- I feel good about how many hours I donate.
- Available time.
- I have health issues - it's hard to take anything on that's not absolutely necessary
- Lack of Time between law and outside demands
- I spend about 15 to 25 hours a week as a Zen teacher.
- Emotional exhaustion from representing low-income/legally unsophisticated/(often) mentally unwell clients in desperate circumstances
- Just do it
- Somewhat restricted given my representation for the government; also time spent at work
- Time
- Lack of time
- too busy with work, family, religious, community service
- too many conflicts when you work for the government.

- conflict of interest
- Insufficient time
- Time
- Spend additional time available in church service.
- Government work does not allow pro bono work.
- As a family law attorney, I usually have approximately 60k per year in work not intended to be pro bono but, instead, have clients who declare bankruptcy or refuse to pay. Consequently, a firm with two lawyers can't afford more pro bono work.
- I work for a nonprofit already and we don't bill clients. I work many hours beyond 40 a week.
- I'm already doing what I believe is appropriate
- Time Constraints with Current Case Load
- no reason
- If the right case comes along I will take it.
- desire
- Judge
- Time
- Opportunities
- Lack of childcare
- I like to leave legal work at the office.
- No good excuse. Laziness essentially.
- Lack of time, but due to family and curricular activities, not employer pressure.
- I believe our firm does a large amount of pro bono work, I just have fallen behind recently due to parental leave. Usually there's a high demand for more and our staffing committee is working hard to identify more that we do not have conflicts with.
- live out of Utah where my license is
- Don't know
- lack of time
- judge
- conflicts w/ government work
- not enough time
- Lack of time
- Finding the right opportunity.
- I am able to do as much as I wish.

- Judiciary
- Public defender - all hours are pro bono to the client
- Malpractice insurance very limited
- have kids at home to care for
- My current work demands don't leave much leeway
- judicial responsibilities
- Too much paying client work, not enough time to do more pro bono work.
- Not doing legal work
- WORK FOR NON PROFIT, PRO BONO IS PART OF EVERYDAY
- I don't have the time to fit it in
- not enough time
- busy, not enough time with other work
- Too busy with billable work
- government employee
- Ethical restrictions
- Not enough time with work and caregiving responsibilities
- I already devote a large percentage of my time to pro bono work.
- Time constraints
- I'm not asked and I don't go looking.
- Lack of opportunity in my area that isn't a conflict with my employment
- Lack of time
- I am comfortable with the amount of pro bono work I provide
- that is what we do
- I'm very busy
- I don't have time.
- I am a judge and cannot engage in legal practice.
- less energy due to age 64
- until last July was a public defender, exempt
- completed a lot of pro bono early but when I had an issue with the BAR the pro bono made no difference so it is better to protect myself in the work I do then help pro bono for self.

- I do a considerable amount of pro bono work
- I do all I want to do
- My clients limit who I can represent.
- government office prohibits me from pro bono work in my area of expertise
- Ethical restrictions on my ability to do certain pro bono work as a result of my state government position.
- doing plenty
- Single client license in another state (CO) which is where my employer is located.
- already doing too many
- Judge
- Young family—balance
- Retired
- Non-profit/public interest, all work pro bono
- Time commitments
- Restrictions on judges on where they can provide pro bono legal services.
- They are the worst clients so I choose to be very selective about who I will represent pro bono
- not enough time
- Retired
- 77 years old & work part time. I do pro bono as it comes to me from friends & neighbors.
- time
- None
- Doing too much already
- Conflict between practice and most pro bono cases
- Few requests
- na
- employment contract does not allow for outside work
- None
- Representing government leads to conflicts. I do not minor pro bono
- Position not amenable to pro bono work

- Judges are not allowed to represent clients in legal matters.
- I am comfortable with current hours spent
- home care
- No time
- Mostly retired
- Time constraints
- Not applicable
- Can't find right opportunity
- xxx
- Time
- Prevalence of conflicts as an AAG/government attorney
- bad planning on my part
- I am a judge
- NA
- no malpractice insurance and no time
- Lack of time.
- Time constraints due to church, family and other activities
- Moonlighting possible, but special authorization required (military practice); family demands
- due to public work, pro-bono work is mostly prohibited
- Don't have time
- no time
- I do not seek it out, but help out when I like the specific opportunity presented
- Not enough time in the day
- Permission required
- Scheduling challenges
- Gov't contract prohibits outside legal work
- selective about nature and impact of work
- I get paid regardless of whether the partner decides to take the case for free
- Not applicable
- sometimes I do a lot, sometimes a little - I do it when it makes sense and I can fill a meaningful need
- Prohibited by military regulation from outside pro

- bono work
- No time.
- N/A
- Do no more than I choose from time to time
- Legal obligation not to
- Managing life balance
- This is enough
- Just don't get around to it.
- I'm too busy
- Few opportunities in our area.
- Retiring and cutting back
- Government regulations
- I donate to and Justice for All
- No time
- Available time
- I am mostly retired and do work for established clients,.
- Time
- Employed in-house and don't have malpractice insurance
- Too busy
- lack of available time due to work and other obligations
- Time
- Time constraints
- Not much call for IP
- Difficulties with pro bono work in my area of law
- Other time commitments
- Not for profit
- N/A
- I don't have much expertise in areas that pro bono clients need such as criminal (expungement) or landlord/tenant or creditor/debtor because my expertise is in such a boutique area (but I would be willing to learn)
- Not knowing who could use my services
- Employer limitations on outside practice
- also. I'm tired. I'm a single mom. I work hard. And need to be done.
- Government employee and not allowed to do pro

- bono
- Don't have time to take on pro bono work
- Virtually all of my work is pro bono
- Difficult to get assigned pro bono cases
- conflicts of interest is areas of knowledge
- Job-Church-Family
- time and expertise
- I do enough
- As a public defender, I'm frankly burned out already. My caseload feels a lot like pro bono work.
- Between work and home life - no time.
- All our work is pro bono. Can't do more than 100%
- Very busy schedule of paying work
- Government - conflicts
- work full time and have a family
- Not enough time
- Family commitments
- I don't go out of my way to find more; life is packed full.
- I choose when and where and how I make charitable contributions. I neither need nor welcome involvement from a governmental regulator in such a determination.
- Conflicts of interest. Having small children at home.
- No insurance
- Low Bono services offered frequently! The Bar needs to start recognizing that small/solo law firms help the "financially limited in need of legal assistance group" way more than is reported, and develop policies based on this reality, which comprises the biggest grouping of attorneys in the state.
- Difficult due to being a government employee
- Lack of interest in doing so.
- government prosecutor, cannot give legal advice in area of expertise

- Raising a young family limits my availability to do pro bono work
- Not allowed by employer
- no time
- Time constraints with work and young family
- Most pro bono requests are either family or criminal law related. I don't practice family law and criminal law often poses conflicts for me. which
- not applicable to my field
- I take pro bono cases in as the Guardian ad Litem in Juvenile Court on a rotating basis. I have not had a pro bono case during the past year due to my need to care for a family member who has had several health care concerns.
- Practice areas do not include typical pro bono cases
- Childcare
- No pro bono necessary in contingency practice areas like PI
- No time
- treasure free time
- No malpractice insurance outside of work
- I do pro bono work by choice regarding various cases; I am not opposed to doing pro bono work when requested by the Bar
- Semi-retired
- Not a lot of exposure out of state
- Doing Pro Bono means doing more work
- Worried will be too much
- Not incorporated into company structure and can't take off work to do it.
- No obstacles to PB work
- It's a public defender office--all is pro bono
- difficulty with scheduling and potential conflicts
- Lack of time
- Government Employee
- Balancing time demands
- time
- The number of hours I have to put in at work
- Personal commitments
- Lack of time
- Don't want conflicts of interest

- We carry enough clients for lengthy periods.
- Too busy with paying clients
- Too busy
- Not really interested in doing more
- No time
- No relation to pro bono needs and intellectual property law
- Time limitations in doing more pro bono
- My role as elected official limits my pro bono options
- I do the max I'm comfortable with doing
- I'm mostly retired.
- General work life balance limitations
- Church service
- Lack of time. I do a high percentage based on the hours I do work.
- time
- I just got a new job, a lot of these questions don't apply.
- We end up doing work that we know we will never get paid for because it needs to get done for clients.
- lack of time
- Service commitments in other legal organizations
- No care for adult disabled child
- not permitted per government
- other interests
- Time available
- Busy
- Limited opportunities given position
- Time constraints outside of work. The question presumes work is the only factor in life, which is a lame presumption.
- Significant hours at work and many other demands on time
- None
- As a conflict public defender, I do plenty of uncompensated work.
- Other case commitments take too much time
- Lack of time
- Don't have the time to draft and research pro bono representation agreements

- rather spend time where needed with family
- Lack of time to go out and find those needing pro bono work
- None
- No time.
- Not enough time
- Time constraints
- Executive responsibilities
- I do not experience obstacles
- Other commitments
- Lack of time - especially when I'm not in a legal job.
- No time
- Area of expertise precludes pro bono work
- Most of my hours are pro bono work
- Not enough time
- I don't have enough time to do the work I have.
- Just not enough time.
- In house and cannot do pro bono
- locating pro bono cases
- no barriers
- do plenty
- Don't care to do any
- Pro bono clients demand too much and are not engaged enough. Low bono is much more effective.
- As a public service employee I am serving the community.
- conflicts because I was a Government attorney
- Not many pro bono clients in my rural community
- POSSIBLE CONFLICTS
- As a government lawyer, I feel like I'm already doing public service for less money than I could make other places
- Single working mother—time
- Employed by state government; cannot represent outside clients.
- Not able to do pro bono

- As a government lawyer, my pro bono options are limited due to extensive potential conflicts. I cannot provide any pro bono service in my area of expertise, which requires me to gain expertise in unfamiliar areas for the limited options that do exist.
- Ineligible
- Lack of available time
- I already give too much time, I can't afford to give up any more.
- Not enough time to do pro bono work
- Single mom
- Pro bono clients demands greater than clients
- Too little time
- Too much work.
- JAG attorneys are prohibited from doing pro bono work, or working outside their position.
- time / work-life balance
- No permitted to do pro bono work under our funding grants
- Time
- Young children at home.
- Taking time away from work.
- not applicable to my practice
- Take most opportunities as they arise
- I am too busy getting billable work done.
- Young children at home, no free time and cannot do it while at work
- no reason
- Lack of time.
- identifying appropriate opportunities
- Pro Bono Clients are generally demanding and unappreciative
- Lack of pro bono program in my area of law
- Ethical rules for judges.
- Small firm can't survive with too many non billable hours
- All of our work is publicly funded indigent defense
- I personally feel that I do a lot of Pro Bono work, usually totaling more than 3-4 hours a week.
- Limitations on pro bono service as government lawyer.
- Judicial
- Job, kids, life in general
- Licensing
- Lack of time. A short series of scheduled events or appointments would work best.
- Don't have time
- not asked to do so - I do when I am, like being a mentor
- Out-of-state travel
- Family obligations
- Pro bono IP work is not really in demand and also to costly to provide pro bono
- Judges cannot practice law
- Policy against any outside legal work
- I already do quite a lot.
- No significant need for pro bono work in contingency cases
- Interesting cases
- ethical concerns as a government attorney
- Fatigue
- Not allowed currently.
- judicial
- My employment as a GAL Attorney prohibits me from doing outside legal work.
- time
- Not enough hours in the day.
- Obligations
- Lack of time.
- Outside time commitments
- Difficult with current state/municipal laws
- Little need for pro bono IP and governance services.
- The type of work I do is contaminated by providing free legal services to clients. They have no "skin in the game" they have no reason to compromise, they have nothing to lose, they have no "reality check." Clients can choose to utilize vexatious litigation to impose emotional and financial hardship on others. Clients have no reason to conform their conduct to legally acceptable norms. In general, although altruistic, FREE LEGAL SERVICES IS A BAD IDEA MUCH OF THE TIME.
- Too many other commitments
- Overloaded with work that has to be done
- Demanding nature of pro bono clients
- My job takes up all my time. I donate money to legal aid.
- time resources
- Retired
- Time is spent in other community service
- I answer daily questions without charge but don't track hours
- I work for a non-profit
- I'm in the process of retiring.
- Time
- Cannot work pro bono because of potential conflicts
- Ethical restrictions as a prosecutor
- Public Defender work is quasi Pro Bono
- Statutory prohibition
- time outside of work day
- none. All I do is pro-bono work
- conflict of interest
- limited time
- My contract as a government attorney requires that I take no cases outside my government work
- I can't practice law as a judge
- Lack of time
- I'm not getting paid for the work I do - therefore I cannot afford to take on cases where I will absolutely not get paid. I cannot even pay back my student loans with what I'm making, let alone try and even have a life. I make less than a job working at McDonalds which is mortifying to say the least. Why to go law school when this is the majority of what I and my colleagues are earning?
- The clients tend to slowing expect more service than you are willing to donate.
- Do not carry professional malpractice insurance
- time
- lack of time

- Conflict with work I currently do
- Busy interesting the State's interests
- Not time to do more with currently workload
- Government work. Not allowed to do other work.
- For most of the last year, I had an obstacle in that I worked for the state and had limited pro bono opportunities. Now I work for a firm and intend to do more pro bono work
- I do about 80% of my time for pro bono work. I try to make some money so there are a few cases I don't take, but typically I will help anyone who asks for it, whether they can pay or not.
- Concerns about conflicts with government work
- Schedule
- Conflicts and getting approval from government employer
- I prefer to get paid for the work that I do--it is work.
- Limited time
- I am a career criminal prosecutor (and defense attorney) and don't feel qualified to give advice on non-criminal related matters.
- meeting quotas set by firm for billing
- I work a reduced schedule and am involved in other non-paid commitments such as court committees and bar section committees
- Everything I do is pro-bono
- Limited due to current employment/conflict of interest
- Government conflicts of interest
- law clerk
- Government lawyer, can't represent clients w/o IOLTA account and professional liability insurance.
- competing church service
- Time
- Limited opportunities that fit within federal government requirements
- Lack of time
- Don't live in Utah.
- Too difficult to find discrete projects

- Need to be better at looking for opportunities.
- No malpractice insurance
- donate my time in other non lawyer capacity
- No time
- Limitations as member of judiciary
- Gov't service
- work life balance
- Other avenues of service use available time
- Time
- Time
- Opportunity
- No time, have a small business necessary to supplement income and need to run that.
- People are ungrateful
- Lack of time
- Ethical constraints
- I already do a lot of pro bono work (300+ hrs last year) and do not believe I need to do more.
- time
- Not enough time after billable work, family, church, etc.
- Need to do my other work
- no day care and I want to be home with my children
- Work for numerous trade associations and ABA
- Not enough time as it is for my paid work and family
- Time
- retired and traveling
- Making the commitment and easier access to cases that I am qualified to handle
- I am nearly 80. I do enough
- Health
- time
- Don't know where to get pro bono IP work
- I must care for ailing spouse
- Trouble coping with stress from domestic cases
- Government Lawyer; Salary
- lack of time
- My assignment is in a branch office and my license is in one but I practice federally in another

- state. My pro-bono work is done with a Utah State Bar Committee.
- time constraints
- Travel as I live in Provo and do pro bono work in Provo but work in Sandy
- I am basically retired, and do arbitration part time.
- Conflict issues with employer
- Not permitted
- legal staff to support work
- Billable client demands
- Clients generally do not appreciate pro bono work.
- Conflict with job
- Lack of awareness of opportunities.
- No time
- nothing
- Work for legal services so already working for little and conflicted out of most pro bono that qualified to do
- Time
- time constraints
- None
- Applicable pro bono recipients
- Not compensated; already exceeding part-time hours
- Lack of time
- Retired
- No requests
- lack time due to workload and family
- None. I work for a non-profit. I do a LOT of pro bono.
- Prefer to spend available time on non-legal charitable work
- N/a
- Lack of time
- I do a ton of Pro Bono
- Time
- Not sure what pro bono work would be permissible as government attorney.
- Out of state government practice

- I'm tired and I leave Utah in the winter
- Wife has dementia
- Lack of work in speciality
- we are the only profession that peer pressures us to work for free, when myself and many of my friends owe \$250,000 or more for law school student loans.
- i do pro bono on a case by case basis. mainly, i give pro bono depending on how i feel about the case and the individual and individuals need
- Lack of available time
- Lack of desire
- None
- Disability
- unable to practice law
- Time
- When you take on a case it could be a lot of work or a little. You don't know. So you have to be careful not to overextend yourself.
- Family commitments
- Work life balance
- Often pro bono clients are the most difficult and least grateful since they aren't invested
- too many conflicts
- nothing
- Not enough time
- None
- No time
- Recent family health care obligations/spouse died of cancer
- Legal related community service
- Already work at non profit
- Bar has too much of a bureaucratic definition of "pro bono"..You don't need bar approval or have some organization be the definition of your willingness and ability to help those in need. There are more who need help than Bar programs and definitions of "pro bono" allow.
- Lack of time; too busy with time sensitive paid work
- difficult finding cases that do not conflict with government office's work

- Cant
- I'm not making enough money to survive. I cannot afford to take time and work for free (anymore than I already do for clients who skip out on my bill).
- finding the time to fit it in
- government restrictions
- Student Debt. I'm buried.
- Other community involvement
- Not presently working in the legal field
- Not a priority
- Don't practice in the areas needed
- already do pro bono at nonprofit job
- Pro bono can conflict with work
- Not interested would rather do other kinds of charity work than legal
- I already do quit a bit!
- Lack of time
- I'm a judge.
- position
- Lose 60-80 hours earned vacation time each year. That is my "pro bono" contribution to the community.
- I am a pro bono attorney.
- Potential conflicts because of smaller community and position.
- No license outside of Utah
- Lack of time
- Client pressures to complete projects
- Barely have enough time to make enough money for my family, but I do what I can
- not applicable
- Other
- I do pro bono work for many individuals who come to me. I don't seek out more opportunities.
- My time is consumed by juvenile defense
- Government attorney, so not required.
- Malpractice insurance
- I can't find a pro bono plumber or school teacher so not a true believer. I do pro bono only for causes I believe in.
- Lack of time

- Time - I do other volunteer work
- Not allowed to do pro bono legal work.
- Finding bona fide needs
- I already work for a non-profit and do more low-bono than pro-bono
- Too many paying clients. Clients who get free services tend to take advantage of it.
- Work in a prosecutor office. Tough to do much pro bono without creating conflicts
- Conflicts
- All my work is pro bono
- Retired
- prohibited by statute from doing any other legal work
- Conflict check requirements, malpractice insurance restrictions.
- As I have aged, I have had less energy to pursue pro bono.
- Work in Japan providing free legal advice to servicemembers
- lack of time
- I do volunteer work for a non profit
- All my extra time is already devoted to charitable volunteer work even though it is not legal related.
- Lack of interest, busy with family and church; I do a lot of charitable work that is not legal related
- many obstacles to doing pro bono work when in-house
- n/a
- Need to find something I'm interested in that I can spend some time on a weekly basis
- Government employee
- Prefer to provide non-legal charitable work
- Government office
- Lack of cases in practice area
- Health
- Indigent defendants are represented by legal defenders

- Time constraints
- I volunteer in non-legal areas that take up much of my time (church service, coaching youth sports, etc.)
- Conflicts of interest
- Lack of pro bono clients seeking assistance
- I work for the State and cannot do any outside legal work.
- semi retired
- Time.
- time constraints
- In my field of law (criminal law/prosecutor) I cannot represent pro bono clients. In other areas of law I lack the experience and lack liability insurance to do pro bono work.
- my entire job is pro bono
- Working Mom -- my work time is government time and my non-work time is 100% for my kids.
- My time is in demand both at home and at work. I do take cases for Utah Legal Services, but only one at a time (2-3 per year)
- Government restrictions
- government job
- No real obstacles
- not interested in available cases
- available time. Also, lately I prefer modest means, where I charge some small amount per hour, than completely pro bono, I find that my clients will consider the value of my time, and their costs, and are therefore more reasonable
- Restrictions of role as a prosecutor
- work for non profit. all of my work is pro bono
- retired
- Projecting and controlling the amount of time that various pro bono projects might take.
- No obstacles
- I'm a government attorney and you don't really do pro bono work.
- Family and personal commitments;
- Work/ life balance - I'm a full-time mom
- Doing enough
- Tired of legal work.
- Work for Municipality
- momentum
- Busy trying to keep up with the work on my plate so I only do pro bono cases that come across my desk that I feel qualified to handle (which isn't very many).
- Give time to charitable organizations
- don't have access to help the people I'd be willing to help
- Insurance coverage is unavailable
- Government position precludes doing pro bono work
- I volunteer for non-legal work many hours per month
- Lack the time.
- Limited time
- Lack of time
- schedule with foster child
- family commitments
- unable to practice law as a judicial clerk
- all our work is pro bono
- No time. Already working a minimum of 11-12 hours per day, on a good day.
- I work at a nonprofit. All my work is technically pro bono work.
- I think if pro bono work counted towards my billables I would do more
- I need to focus on my paying clients. Pro Bono clients tend to require more time.
- judicial employment
- Time constraints
- Statutory prohibition as a quasi judicial officer
- Pro bono is about all I do. But I don't want to do much of anything
- conflicts of interest
- Insufficient free time
- Work schedule, too busy
- When I get a new case, it is too consuming to take on additional pro bono work. I already give significant time to pro bono work.
- Cannot file electronically through government account
- My choice
- Liability concerns
- Lack of time due to other commitments.
- precluded by rules related to my ALJ position
- Not enough time to do both
- Don't want to
- Pro bono clients are often very difficult, demanding, and have no incentive to resolve the case.
- No obstacles. I could do more if I wanted to.
- It can be argued my profession is pro bono work
- Given my job, I cannot perform legal work for clients
- Desire
- New job and before I was at a clerkship. I plan to be more involved in the future!
- Don't want to
- availability of malpractice insurance
- Time constraints
- I am satisfied with my current level of pro bono work.
- Family life is very hectic right now
- Department already stretched thin for the clients demands
- only so many hours in a day.
- The kind of work that I do, I believe that I do people a disservice if I do free work for them because it just sets them up to fail harder/bigger after I have done what I have done.

- There are no obstacles. It is an issue of personal commitment.
- Work out of state
- My work is mostly on a contingency fee basis and that is not conducive to pro bono arrangements. That being said, I discount my fees in many cases to make sure that injured clients receive what they deserve.
- n/a
- I just always have 1 or 2 pro bono cases. They just come in randomly, usually from church or from acquaintances.
- personal and family time commitments
- All of our work is theoretically "pro bono" so there is no emphasis on maintaining a profit/pro bono balance during work time.
- Many pro bono programs are geared toward those that work in law firms. As in-house counsel, I don't have all of the resources (e.g. Pacer, e-filing) that firms have.
- lack of time
- Time
- Statutorily barred from doing cases outside of GAL office
- n/a
- time
- Non-legal obligations on time; pro bono opportunities that are interesting to me.
- Time
- N/A
- I don't feel that I need to do more pro bono work.
- Professional exposure due to lack of expertise
- Lack of desire
- Firm donates money to legal aid in lieu of pro bono work.
- Cannot work as an attorney
- Semi-retired and choose to limit time doing legal work
- time
- I do enough already, along with other types of charitable service
- Access during convenient hours & COI concerns
- pro bono work is not in the fields in which i have expertise. Odds of errors are high
- Time
- available time after work and other volunteer work (non-legal)
- no excuse
- Not aware of attractive opportunities
- Can't work as an attorney outside of job
- government worker
- No time.
- lack of experience in fields where pro bono is requested, no professional liability insurance
- Government employer restrictions on taking cases not assigned by the court.
- Rules of Judicial Conduct.
- opportunity
- time constrains
- Lack of knowledge about pro bono opportunities I can participate in.
- Being a lawyer is too expensive with the cost of CLEs and license renewal. I became a lawyer to serve people, but can't even put food on my own table.
- Lack of time
- Conflicts with employment
- Time: 2+ hour commute and two children under 2.
- Full time in house
- Family time, 2nd job, conflicts with my job as prosecutor
- Lack of time
- Choose to do charitable work of other type
- Frequent Conflicts as Gov. lawyer
- Government attorney restrictions on pro bono.
- No time
- I am not interested in pro bono. Will not do legal work for free
- Lack of time
- Lack of time
- Conflicts
- Age
- conflict
- my legal expertise does not lend itself to pro bono work
- Government position
- Time constraints
- lack of time
- Not sure of the value of pro bono work. Clients seem to feel entitled so there is a lack of gratitude in many cases and the need for pro bono work is often caused by the judicial system itself, which could be remedied.
- Not permitted to do pro bono work as a federal employee
- Time
- desired opportunity
- Government ethics rules
- active duty military
- Family obligations
- None
- Lack of cases that are of interest and in my skill set
- Government attorney
- Living abroad
- Too burned out
- Currently not in the USA
- I don't want to do more pro bono.
- Semi retired
- entitled people who expect pro bono
- conflicts with paid work
- Too damn busy
- Don't have time

- Owing to my nature, I have done huge amounts of pro bono work that I've never report to the Bar
- none
- Don't know where to do it
- My time is highly committed to my work and other activities
- I live over seas where there is no pro Bono work done
- I think the state should pay for necessary legal work
- Pro Bono organization ending
- Sufficiently engaged
- Just need to find the time and opportunity
- Involved with other volunteer opportunities.
- We tend to do pro bono work on a firm basis, and other people tend to take those hours due to lack of billable work. I happen to always have billable work.
- I'm a securities lawyer - not much opportunity for pro bono securities work.
- Lack of time given work/personal obligations
- Conflicts and legal specialty not amenable to pro bono
- Lack of time
- Time commitment is usually an obstacle
- Don't want to
- Other pursuits.
- Can't as prosecutor
- time split between work and family obligations leave little free
- District attorney, unable to.
- Government prohibitions on representing others in criminal cases
- Client demands
- Only handling cases I'm appointed to
- General lack of time/parenting responsibilities
- Work for the government and pro bono hours require special permission.
- Resources such as electronic filing
- Prohibition against legal representation of clients
- Not enough time

- Not applicable - corporate counsel
- Time
- Retired - a good share of the work I do is pro bono
- Na
- Time
- Federal public defenders restrict outside work
- I have substantial school debt and need to focus on working.
- time
- Lack of time
- time constraints, other demands on my time
- Age and time availability
- Already do free legal aid
- have not had enough time
- Work out of home, few hours/week.
- My job is pro bono work
- sick of beggars and democrat operatives trying to steal my time.
- Retired
- No time
- I help folks time to time
- Many years doing pro bono
- Time
- I'm doing all I feel appropriate
- Caring for my wife and her medical condition
- Lack of desire. I do about 50-75 a year.
- JAG
- Time
- Other volunteer obligations
- I'm six figures in debt, and can't give my time away
- Time
- Don't have the time.
- Retired
- I am a public defender
- Caseload
- Hard to do pro bono work as in-house attorney
- Retired. Frequent travel out of state.
- Other interests
- Government - conflict of interest.

- Frankly, I'm sick of hearing about it.
- I'm a judge
- I am not staffed to handle litigation or non- work related matters.
- Busy home schedule
- Lots of work for clients that intended to pay but did not or could not.
- I spend time on pro bono work every day
- Family and personal obligations
- I do a lot of pro bono work - 200 hours per year
- I do it as it comes up
- Not interested in helping Utah residents.
- sick of forced servitude
- Lack of time
- clients and their demands
- Sick and tired of doing pro bono work
- Lack of billable credit for pro bono hours.
- Offer reduced fees, but not straight pro bono work
- only 10% of the pro bono bankruptcy clients are able to do the paperwork required for their cases so they give up.
- Lack of time and available projects that fit my skill set
- I am not allowed
- Government approval
- Pro bono work is miserable work. Clients are among the worst, cases are among the worst. My job as a divorce lawyer is hard enough and thankless enough without having to do it for free.
- Doing as much as I want
- Availability of pro bono work where I live.
- Not a lot of corporate pro bono work.
- Time. Also, lawyers are unfairly burdened with continuing education and fee requirements that are not required of other occupations yet are expected to perform free work. I would love to perform more pro bono work, and the current fee / MCLE requirements need to be adjusted to promote such.

- I volunteer teach so I don't do much pro bono-- I contribute in other ways. I have found doing pro bono problematic in that it is often not appreciated
- Lack of time
- I don't have malpractice insurance that would cover pro bono cases
- Prevented. Judicial ethics
- Don't believe in it. It creates artificial incentives making litigation more costly for nonindigent. No economic counterincentives to slow litigious indigents down.
- Malpractice ins
- I have time to do pro bono now
- Judicial opinion re: full time justice court judges
- Other charitable and religious service opportunities take all free time
- Time Constraints
- No obstacles
- government rules
- Not enough hours in the week. I voluntarily take care of two handicapped people from the streets.
- age
- Too much other work
- Paying clients not paying
- Judicial ethics
- time
- I do not receive credit for pro bono work by my employer.
- Unable to represent clients while working for state
- Time constraints - still have children at home
- Quality of life-work balance
- Our firm counts pro bono hours towards our billable requirement
- Limited by ethics.
- Hard to create time in schedule
- Pro bono work can be extremely time intensive and once you get involved in a case you can't

- get out
- Not interested
- Educational Pursuits
- Convenience
- Conflicts, incl employer policies re conflicts
- Unreasonable and ungrateful attitude of pro bono clients.
- None
- Had/have some personal issues that needed/need to be resolved which are taking up a huge amount of my time.
- Government Conflicts
- lack of time
- Other time commitments
- I already have plenty of billable work to complete
- compelling cases
- Volunteering in other capacities takes up much of my time.
- I have limited free time and prefer to spend it with family.
- I don't have time, given other community/volunteer hours.
- Employer promotes pro-bono works and compensates as though billable time; but I have too many other clients filling my time to do more than about 10-5 hours a month
- Difficult to fit into schedule.
- As a single mom with family and church responsibilities it's very difficult to squeeze in pro bono work at this time
- Lack of time and money
- I can't take time away from my paying job for pro bono work. And I prioritize time with my family and time for myself over providing pro bono legal work.
- Not interested.
- lack of extra time
- Limited by judicial ethics
- I work at a non profit so I don't see the need

- lack of time
- Prohibited from taking on any outside representation.
- Not enough time in the day!
- family obligations
- Time
- Other commitments
- Too busy with current paying work
- Not licensed in the state in which i reside because reciprocity only extends 5 years I raised my children and was last employed in 1997. I can not waive into N.J. or NY bar because of the length of time I've been away and this am prohibited from employment as an attorney other than in - house license
- Time & conflicts - only lawyer, no staff
- Interest
- Semi retired
- Don't believe in it for IP
- Need
- Too busy doing billable work
- Years of experience have taught me that when legal services are given for free they are not respected and the client expects you to do all the work. Thus, I have moved to a low bono model where the client is expected to pay something for the services received.
- Demands of other client cases
- Employer's conflict of interest requirements

Question 38: Identify the billing arrangements you have agreed to in the past two years. Please select all that apply.

- Hourly with a cap
- non- profit. We use grants, don't bill clients.
- In-house
- Salary
- Some clients work off their fee on my project.
- NA
- Straight hourly
- none; on a salary
- hourly
- None donated time
- cap on total fees
- Hourly
- Limited Scope hourly/flat fee
- billing by hour
- N/A
- N/A
- N/A
- not applicable
- salaried
- Hourly
- Not applicable
- N/A
- N/A
- I don't bill.
- N/a
- Not applicable
- a
- salary in-house government
- Government attorney
- hourly
- hourly only
- None; n/a
- Hourly
- I don't take clients other than my company
- Not applicable
- Hourly
- hourly
- Hourly
- Hourly
- n/a
- hourly
- Non-profit, no fees charged to eligible clients
- No billing arrangements; salaried representing the State in all criminal appeals
- I have only billed hourly
- NA
- NA
- Hourly
- Discretionary
- hourly only
- does not apply
- None. Gov't atty
- no fee/ pro bono
- Not applicable to government practice.
- None of the above.
- We don't bill clients
- just by the clock. no billable hours, just timing and charging for the time i put in
- completely free
- capped contingency fee
- Na
- hourly only
- N/A
- in house owner...my compensation is not based on these types of structures
- NA
- Government attorney
- We are insurance staff attorneys--no billing
- Unbundled/Limited Appearance
- Hourly
- Hourly
- Government
- hourly
- I'm not currently privy to these arrangements.
- I don't bill
- salary
- None
- judge
- Government work. I just get paid hourly.
- None
- Hourly
- and hourly depending upon matter
- For a juvenile case, I accepted work from the client (16 yr old boy) who did farm work on my property in part-payment for my services
- hourly
- Hourly rate only
- n/a
- Not applicable
- Contract with county
- doesn't apply
- Not applicable
- NA
- n/a
- gov't work on salary
- SLIDING SCALE, LOW BONO PRO BONO
- Trade work
- hourly / flat fee if uncontested on occasion
- N/A
- Do not bill clients
- None. Government attorney.
- Government
- Pro bono
- Hourly
- Hourly
- In-house
- In house

- Hourly
- NA
- N/A - government attorney
- Monthly retainer
- Hourly
- None of these
- not applicable
- Not applicable
- N/A
- hourly
- N/A-Government
- not applicable
- Usually only hourly.
- govt salary
- government hourly
- Not applicable
- Worked in house.
- hourly
- No billing - Government attorney
- pro bono
- salary, government lawyer
- Not applicable.
- reduced rate
- Salary
- N/a
- Hourly
- We don't bill clients
- No fees are charged
- Pay me what you think is fair, and what you're able to pay. Otherwise, I will consider it pro bono.
- not applicable
- hourly only
- No billing done.
- Just hourly
- I am a salary paid employee
- Na
- hourly
- N/A
- n/a
- hourly
- hourly only
- hourly

- na
- Per hour
- hourly
- I do not bill
- No billing - government
- Pro bono, but for filing fees and service fees
- N/a
- I don't bill
- hourly but allowing small monthly account payments
- in-house counsel, not applicable
- N/A
- N/A
- government
- Billable without reductions in hourly fee.
- Not applicable
- Not applicable
- not applicable
- N/A
- None
- Hourly
- xxx
- Straight hourly
- Not Applicable
- N/A
- N/A
- Non-profit - no fees
- NA
- I am in house counsel - i do not bill my client
- hourly
- No billing
- hourly
- N/A
- staff attorney for ins. co.
- Not applicable
- Hourly
- Only pro bono
- Salary
- Not applicable
- When and if there is money, the time and expense is discussed with the client and the client decides what the fee will be

- 100% free legal aid for all clients
- None. Government.
- Billable hours
- No fees
- Hourly
- N/A
- Hourly
- None of these
- pro bono
- NA
- Hourly
- Hourly
- None
- N/A
- Salary
- Always hourly rates
- Govt.
- Reduced hourly
- Not applicable
- Hourly Government
- In-house attorney
- Govt employee. Don't bill
- Salary
- pro bono
- Salary
- Not applicable in my current job
- Na
- government
- Government contract
- N/A -- Government law office
- Not for profit
- hourly
- N/A
- hourly
- Just work for free
- Hourly
- Hourly
- Free services, do not charge fees

- not applicable
- N/a
- hourly fee
- paid through agency budget
- N/A
- Flat fee plus trade (i.e. I handled a piece of litigation for some money down and hair services from a client that couldn't afford to pay me otherwise.
- We do not bill clients
- hourly
- I don't bill my clients - legal services is a member benefit
- None
- Court Appointed Counsel - Public Defender
- Government funded public defense
- None: all payment is by Risk Management or the Attorney General's Office.
- N/A
- Flat fee for monthly work.
- n/a as in-house
- The only clients I've assisted have been pro bono.
- I work for a government entity and am paid a salary.
- government no billing arrangements
- In house/salary
- Hourly with a maximum (becomes flat fee)
- N/A
- Hourly rate
- Hourly
- government attorney
- not applicable
- No billing
- not applicable
- N/A
- na
- Solo in house
- discounted rates or discounted flat amounts
- NA
- N/a
- I do not work on a contingent fee basis. I often

reduce my fees for low income parties.

- N/a
- Hourly
- Flat, hourly
- N/A
- N/A
- Hourly
- government
- Salary
- Not applicable
- NA
- Hourly; also blended Hourly/flat fee
- reduced hourly
- Subscription
- Not applicable
- In-house hourly
- Hourly
- we don't bill
- N/A
- Hourly only
- None
- I gave free advice to neighbor
- not applicable, except to work outside government work
- n/a
- NA
- N/A
- N/A
- none; clients not charged
- Not applicable government lawyer
- Not applicable
- N/A - Gov't
- n/a
- hourly only
- government public service
- Government
- n/a
- by hour
- Salary
- Flat fee for anticipated matter, with possibility of adjustment for unusual hours.
- not applicable

- na
- hourly fee
- None
- hourly only
- not applicable
- I'm salary, so this question does not apply.
- Contingency capped by hourly rate
- I do not bill for my legal work
- Hourly
- Capped by phase.
- Hourly
- Time and materials
- hourly
- For a juvenile case, I accepted work from the client (16 yr old boy) who did farm work on my property in part-payment for my services
- None
- N/A
- Gov't salary
- I don't bill
- Straight Hourly
- billable hours
- N/A
- n/a
- hourly only
- Hourly
- I am on salary
- GOVERNMENT
- Public Defender
- In-house counsel
- hourly rate
- Salaried
- n/a
- n/a
- n/a
- only retainers and hourly billing
- Don't know
- Government law

- N/A
- none
- Salary
- hourly
- Not applicable
- hourly
- N/A- free services
- No fees charged
- None
- Hourly
- n/a
- None
- Government attorney - no billing arrangements
- na
- Salary
- Pro bono
- Pro Bono
- hourly
- Law student
- Salary
- NA
- salaried employee
- hourly rate
- hourly
- government
- NA
- N/A
- Not applicable
- N/A
- Contracted indigent defense provider
- n.a
- hourly
- Not applicable
- In-house salary
- Not applicable
- I am salaried
- Hourly
- N/A
- Not applicable
- N/A
- Hourly

- Don't do contingency
- hourly
- NA
- N/A
- Hourly
- Filing fees only
- NA
- Not applicable.
- Not applicable
- judicial
- Do not bill as a GAL attorney
- Single contract for hours worked.
- None of these.
- pro bono
- Hourly
- I'm a govt. attorney
- Hourly
- contingency percentage reduced depending on outstanding medical bills owed by the client factors
- hourly
- Hourly billing, insurance approved charges, and fixed retainers to hold against work performed, with willingness to "write off" any excess as a courtesy to prepaid clients.
- N/A
- Hourly
- Not applicable
- in-house salary from my employer (I don't bill)
- None. Salaried in-house.
- limited scope
- None
- Social security disability fee agreements are highly regulated
- No billing arrangements
- n/a
- Retired
- none
- hourly per firm policy
- Hourly
- None. I do in-house legal work.

- none
- N/A Government Lawyer
- NA
- Not applicable
- I do not bill as a government attorney
- None/Not Applicable
- None
- Don't bill
- Pro Bono - no charge
- N/A
- salary
- salary
- All pro-bono
- N/A govt
- N/A
- n/a
- Packages for consulting and coaching
- I have not accepted the offers because the amount was so low I could not survive on what people want to pay an attorney to work their guts out for a client!!
- Gov work
- Fixed monthly retainer.
- Government Billing
- Government attorney
- Straight hourly
- Do not bill.
- I worked for the state, and was not engaged in billing arrangements
- Reduced hourly for child welfare matters
- Our government work is billed to our client agency on an hourly basis
- No fee, potential for attorney fees under federal statute
- N/A
- Reduced fee/other arrangements
- not applicable
- Hourly
- government

- Government lawyer
- salary
- hourly
- pro bono/salary
- Salary from DOJ
- salary
- hourly
- Hourly
- Government lawyer - no billing.
- NA
- hourly
- hourly
- Government
- Government employee
- Government attorney – do not bill
- I bill government clients hourly
- I don't charge any fee; I work for a salary.
- Currently unemployed
- have not worked as an attorney for several years
- In-house
- N/A
- government
- Salary
- I do not bill
- Salary
- not applicable
- hourly
- Hourly only
- None
- I don't bill. I work for a nonprofit law firm.
- Debt collection contracts
- hourly
- Not applicable
- NA
- Na
- N.A.
- hourly
- Hourly
- N/A government
- Monthly payments on outstanding bill

- none
- Not applicable
- In-house; not applicable; but in buying, have used all three
- Just billing an hourly rate
- Strictly hourly
- hourly rate with discounts for high volume
- Salary-government work
- hourly billing
- Hourly
- hourly if unexpected complications or additional work
- Not applicable
- Discounted
- N/A Government Attorney
- Government Salary
- non profit/pro bono
- I receive a salary
- N/A
- not applicable
- I'm a government employee on a salary
- hourly rate
- I work for the government and don't bill.
- None
- NA
- Mix flat fee
- Reduced hourly fee and pro bono
- Hourly
- No billing
- N/A
- None
- Not applicable
- see preceding manner of billing
- None
- none
- Hourly
- NA
- Hourly
- Retired
- Salary—house counsel

- N/a
- Monthly caps
- Pro Bono or hourly
- Pro Bono
- In house
- Salary
- all pro bono
- Government
- Military
- Nonprofit
- Time worked
- Not applicable
- Na
- Hourly
- hourly
- other type of blended
- N/A
- hourly fee
- n/a
- NA
- None
- None
- not applicable
- Hourly
- None
- not applicable
- Salary
- hourly
- hourly only. Most fair.
- I work at a law firm and have no say in these matters
- now I bill in hourly rates. Previously, I was simply paid a salary by my office
- None
- Didn't
- Hourly
- Gov't work
- not applicable

- Have not worked in legal field in past two years
- Do not bill
- hourly with a cap
- They cover expenses and I wait for their receipt of money to be paid
- Salary
- n/a
- Salary
- n/a
- Not applicable
- I am a pro bono attorney.
- Salary
- Government work. Don't bill.
- Standard hourly
- Not applicable
- not applicable
- NA
- Non applicable
- not applicable
- Government agency. NA
- Hourly
- Salary
- Do not bill out my time.
- NA
- N/A
- n/a
- NA
- Pro bono
- not applicable
- Hourly
- pretty much all hourly right now.
- Trade for services
- government work
- Discounted hourly for volume work
- n/a
- government work - so not up to me
- Not applicable
- Na
- hourly
- No charge
- I take pro bono cases through my church, so no charge

- Hourly
- Government / Don't bill
- Not applicable
- hourly but rates may vary
- Government office
- hourly
- N/A
- I am a judge.
- n/a
- Government work so the legislature set the billing arrangements.
- In-house, salaried.
- Not Applicable, Government Attorney
- my clients are indigent and court appointed
- NA
- N/A
- N/A
- Retired
- Government
- Pro Bono; Monthly Billing Plans instead of requiring initial retainer up front.
- non profit--no billing arrangements
- Hourly
- not applicable
- No billing
- No Billing Arrangements
- not applicable
- fee based only
- I don't bill anyone — pro bono only
- Payment Plans
- work for the State of Utah
- salary
- hourly
- Hourly
- N/A
- NA
- I charge hourly for mediation
- not applicable
- no billing arrangements
- Not Applicable
- N/A
- Do not bill

- agencies pay me an hourly rate
- hourly
- pro bono
- government salary
- N/A
- Hourly
- Hourly
- hourly with an estimate
- Salary
- In house/government
- Hourly rate
- n/a
- Redundant
- n/a
- Non profit - bill to grants/contracts
- Payment Plans
- none
- government work not applicable
- Government work
- none
- Not Applicable
- N/A
- none
- not applicable
- Hourly
- Not applicable
- n/a
- N/A
- Hourly
- non-profit; our clients do not pay a fee
- hourly
- No fee
- Not applicable.
- n/a
- Hourly
- Hourly
- annual dues
- I don't bill my time. in-house.
- Not applicable
- Hourly

- None
- Hourly
- Hourly
- N/a - government practice
- N/A (have been in-house the past 2 years)
- N/A
- Hourly
- Not applicable
- Salary
- NA
- Hourly
- hourly
- government
- Hourly
- hourly
- N/A - in-house counsel
- N/A
- hourly (as client of outside counsel)
- hourly
- Salary
- n/a
- I have no billing arrangements. I do not bill. I draw a salary.
- N/A
- Don't bill
- not applicable
- N/A
- None
- None - government office
- Not applicable. I am a judge.
- Salary
- Hourly
- N/A
- none. government
- I do not bill
- does not apply -- in house
- Hourly
- Not applicable — federal salary
- N/A
- None
- Salary

- none
- n/a
- None -- government attorney
- Salaried government employee
- NA
- NA
- As in-house counsel, I do not bill.
- gov lawyer = funded direct hourly
- in house counsel, do not bill
- Government salary.
- N/A -- government work
- Not applicable
- just hourly
- I'm a gov't attorney representing gov't agencies
- hourly
- Flat fee criminal if settled. Civil hourly plus expenses.
- not applicable
- Salary
- Not applicable
- N/A
- Not applicable
- None
- None - government work
- N/A.
- Na
- not applicable
- None
- straight hourly
- Hourly
- N/A: government
- Army JAG, so no billing arrangements
- N/A
- This is heavily litigation related. I do hourly billing or flat fee for small transactions.
- hourly
- Fgy
- none
- Hourly
- No billing arrangement
- none

- N/A
- None
- none
- Government contract
- hourly
- No applicable for my situation
- None (government)
- hourly billing
- Salary
- Bartering legal services with legal agreement
- Government
- Hourly
- Non profit
- N/A
- Not applicable
- Worked in advisory capacity only
- Hourly
- NA
- Government, we don't bill
- None. Inactive.
- Retainer Agreement
- sure would like steady work
- No billing
- None—government attorney
- Not applicable
- State salary
- N/a
- N/A
- Paid hourly by employer, don't negotiate fees
- NA
- Hourly
- straight hourly
- Government
- Legal Aid, none
- Not practicing
- Salary

- None
- Hourly
- Hourly
- N/a - government practice
- N/A (have been in-house the past 2 years)
- N/A
- Hourly
- Not applicable
- Salary
- NA
- Hourly
- hourly
- government
- Hourly
- hourly
- N/A - in-house counsel
- N/A
- hourly (as client of outside counsel)
- hourly
- Salary
- n/a
- I have no billing arrangements. I do not bill. I draw a salary.
- N/A
- Don't bill
- not applicable
- N/A
- None
- None - government office
- Not applicable. I am a judge.
- Salary
- Hourly
- N/A
- none. government
- I do not bill
- does not apply -- in house
- Hourly
- Not applicable — federal salary
- N/A

- None
- Salary
- none
- n/a
- None -- government attorney
- Salaried government employee
- NA
- NA
- As in-house counsel, I do not bill.
- gov lawyer = funded direct hourly
- in house counsel, do not bill
- Government salary.
- N/A -- government work
- Not applicable
- just hourly
- I'm a gov't attorney representing gov't agencies
- hourly
- Flat fee criminal if settled. Civil hourly plus expenses.
- not applicable
- Salary
- Not applicable
- N/A
- Not applicable
- None
- None - government work
- N/A.
- Na
- not applicable
- None
- straight hourly
- Hourly
- N/A: government
- Army JAG, so no billing arrangements
- N/A
- This is heavily litigation related. I do hourly billing or flat fee for small transactions.
- hourly
- Fgy

- none
- Hourly
- No billing arrangement
- none
- N/A
- None
- none
- Government contract
- hourly
- No applicable for my situation
- None (government)
- hourly billing
- Salary
- Bartering legal services with legal agreement
- Government
- Hourly
- Non profit
- N/A
- Not applicable
- Worked in advisory capacity only
- Hourly
- NA
- Government, we don't bill
- None. Inactive.
- Retainer Agreement
- sure would like steady work
- No billing
- None—government attorney
- Not applicable
- State salary
- N/a
- N/A
- Paid hourly by employer, don't negotiate fees
- NA
- Hourly
- straight hourly
- Government

- Legal Aid, none
- Not practicing
- Salary
- Hourly salary
- By the hour
- Salary
- Hourly rate
- Hourly
- Reduced hourly rate
- None
- N/a
- Equity
- N/a
- N/A
- None
- Retired
- None. Public defender
- None
- N/A
- In-house
- Retired
- Hourly
- Don't bill.
- N/A
- Na
- N/A
- NA
- None
- None
- Per doc
- hourly/flat fee
- NA
- Na
- Regular billable hours
- No billing. Government
- Not applicable
- Na
- Salaried
- NA
- Stock and barter
- N/A

- Hourly consulting, but written documents or hearings may usually be done on a flat fee basis.
- None
- Not applicable; in-house salary
- Don't bill
- None
- I only perform salaried and pro bono work
- Hourly
- I was a government attorney
- Govt salary
- We do not litigate
- Hourly
- N/a
- Nonprofit
- N/A
- Hourly
- Hourly
- reduce rate negotiated by insurance companies
- Salary
- N/A
- Government
- Contract
- Hourly
- na
- N/A
- Not applicable - judge
- Government work - no fees
- trade
- n/a
- hourly
- trade for service and property
- Public defender
- Not applicable
- None. Govt
- NA
- Hourly only
- Hourly fee
- Trade for services
- N/A
- straight hourly

- in-house salaried
- No billing
- I have not done billable work in the past 2 years
- Hourly with percentage discount for specified period.
- Hourly
- Government billing.
- Collateral
- As in-house counsel, this is not applicable.
- I'm salary in-house
- in house
- Na
- Hourly
- N/A
- N/A
- Contractual with a state agency or local government
- In house counsel. No fees.
- Bill by the hour
- Not applicable
- have not agreed to any billing arrangements
- NA
- City wages
- Not applicable
- Hourly
- N/A
- Straight hourly most clients
- Hourly
- Hourly

Question 40: What is the primary reason why you do not have professional liability insurance? Please select all that apply.

- Government
- I do mostly immigration law
- Trying to get insurance.
- Not needed for employment
- I need to get some, and I am working on it.
- Work for Federal Government
- I was not able to find anyone willing to insure me the last time I looked (years ago)
- Didn't have it for a long time and hard to get tail coverage
- Uninsurable
- Only take corporate clients.
- I only take a case or two in a given year.
- Provides very little benefit.
- It is a waste of money and paints a big target on our back for law suits.
- I have two trusted clients and do not take new clients currently
- firm doesn't provide it
- Not needed
- Client mix: I am a part-time judge and long-term onsite counsel for only a couple of companies
- All insurance applications have been declined
- social security work has a very small proportion of malpractice cases
- I had it for years and it was expensive for not much benefit.
- Retired
- We are in the process of obtaining it.
- Government
- My work as a court appointed Guardian ad Litem is covered by the Office of Guardian ad Litem.
- I did carry my own professional liability insurance when I was in practice. I cancelled it when I was no longer doing legal work for clients.
- N/A
- Judge
- It makes an attorney a target for claims.
- Have not yet applied
- I am in the process of trying to obtain it, but am having a difficult time getting quotes.
- At the moment I mainly do drafting work for other attorneys
- Not handling many legal cases
- I was not able to find anyone willing to insure me the last time I looked (years ago)
- Only handling federal appointed cases so not necessary
- In-house counsel
- I'm in-house counsel and have not considered it before or know if it's needed
- Too little work to justify the expense; No risk to work I do
- few clients
- non-profit
- Government lawyer
- Deductible is higher than typical claim
- Received a quote from an insurer but coverage required a backup attorney for solo practitioners, and I have not yet been able to convince another attorney to be listed as a backup attorney.
- Insurance increases the time and costs associated with resolving claims and encourages predatory lawsuits.
- Not high risk practice
- government
- Government lawyer
- Mostly retired
- in-house
- I only do adoptions privately in addition to my government work,
- Government Lawyer
- The areas I practice in I don't worry about financial issues.
- perform work pro bono or contract for other firms
- I don't practice law.
- With criminal law it is nearly impossible to show the client was damaged.
- Mostly pro bono work. A few odd jobs for friends.
- I have insurance
- in house insurance provided by employer , mediation practice
- Not enough clients or income to justify the expense.
- comfortable with my service and the integrity of client
- Winding down practice
- Application process is too burdensome
- I am retiring shortly
- I do not have clients.
- Not available for area of practice
- I work for somebody else
- The damages that result from malpractice in what I do are negligible. All I can do is help.
- Solo practitioners are targets for malpractice firms when they have substantial insurance.
- My office covers this
- Legal work primarily for family and personal interests;
- I am a government attorney and it is provided.
- MOSTLY IN HOUSE; EMPLOYER HAS MALPRACTICE; ONLY DO OUTSIDE CASES ONCE IN A WHILE
- I am very careful and get to know my clients and protect myself

- N/A In-House Counsel
- Firm decision
- I don't have clients
- Not applicable for in-house counsel
- I just opened my own office and I don't litigate.
- In-house counsel -
- Insurance companies unwilling to provide insurance for semi-retired lawyers
- Inapplicable, gov't attorney
- in house employment
- just haven't gotten to that point in activity
- My assets are protected via a Spendthrift Irrevocable Trust
- I practice for one client, a corporation.

- Newly appointed to defense contract.
- retired
- 90% of work is for single client with very little risk exposure
- I am trying to retire
- I do very limited work
- I don't have assets enough to make suing me worthwhile
- I'm a judge
- Confidential.
- the persons who come to me for representation are not likely to sue me for malpractice
- Not needed
- My employer doesn't believe it's necessary

- My work is extremely low risk
- public defender
- Work for one client as in house counsel and manager
- Having insurance encourages law suits. My type of law is not highly risky for law suits.
- Not practicing
- I financially fix my errors as they occur
- I'm mediating only and the statutes protect me

Question 42: During the next five years are you planning on any of the following? Please select all that apply:

- Planning to maintain the practice for five years and then cut back (partially retire)
- Judicial role if available
- I plan on applying for judge positions
- May renter public interest full time
- Likely stay the same
- Open to opportunities, including continuing to work for my current firm but remotely or moving in-house/governmental
- Planning to leave in-house and start solo practice
- I plan to continue to work as I am working, which right now entails in-house counsel for a physician private practice and a lot of pro bono work in the area of Planning to keep practice and work in other areas as well
- Apply for the bench
- Either continue working document review or hope I can get a job as in-house.
- additional office locations
- Changing my area of practice.
- Possible lateral transfer.

- I am retired from the bench and working part time as a lawyer
- Continue working, can't afford not to work.
- I'm considering a change in career - keeping legal/non-legal profession options open
- I'm leaving in house counsel to start a law firm.
- Planning on keeping as busy as I can
- about as is
- hoping to augment my practice as soon as health issues allow
- Planning to leave government for law firm
- Planning to teach law
- May leave current job for another in-house or small firm job
- May continue to practice law full-time for a non-profit
- Continue as a licensed attorney but not practice
- Unsure. I may go back to work in a law-related capacity depending on my children's needs. I would expect to only work part time.
- Planning to leave government and apply for

judicial office

- Semi-retired currently
- As I contemplate retirement, I am not sure what that will look like.
- Expand into additional markets (in addition to UT and AZ)
- Do more reduced fee and pro bono work
- I plan to continue to work as I am working, which right now entails in-house counsel for a physician private practice and a lot of pro bono work in the area of Get licensed in other states
- n/a
- Would like to leave litigation and do something less stressful
- I am already semi-retired
- starting my own practice
- May be forced to leave the profession due to competition from nonlawyers permitted to encroach on practice of law by Utah Supreme Court.

- phasing out of the practice
- Retired
- i may retire but continue to grow practice of firm
- I have to find another job because there are no jobs or firms / employers who will help, bring you along etc. and I'm not surviving to, as said earlier, even pay Planning to revolutionize the legal industry. I won't quit.
- Retired
- Retired
- Plan to devote more time to other business development
- Increase ADR work and leave litigation
- I plan to leave to practice in a non-profit
- Both leave and stay (part time contract work, plus regular W2 job)
- I may join a firm not owned by myself
- Planning to increase mediation practice
- Further education
- Already 99% retired.
- move to private sector
- Maybe go back to private practice.
- do more charitable and non profit work
- Retired already
- Undecided
- LDS Mission
- Retired
- Not being alive
- I'm already in house. Will probably stay there.
- I currently earn less per year than a public school teacher right out of college. If I cannot increase my income with paid legal work, then I plan on leaving the Who knows.
- considering other options
- don't know - not sure I can afford to retire
- Retire from government, go into private practice again.
- Not sure
- Planning to leave JD-preferred work for in-house
- Planning to have children but stay involved in the practice, but anticipating needing some maternity leave or possibly a slightly reduced practice
- Continue on retirement track with a license to do Part time volunteer work
- Closing firm, not sure what's next
- Would like to get back to the practice of law, but am committed to the federal system and few opportunities exist in Utah compared with other states.
- I quit my previous job in October 2019 and was not planning on continuing to be a lawyer. I was unemployed for about 2 months.
- Already retired.
- Planning to stay involved in legal practice but at a different employer or practice type.
- I would like to leave the law profession, but unsure as to if I can find other work.
- retired already
- unknown
- Planning to leave government and go back to a law firm or in-house.
- Expect to be fully retired and doing no legal work
- Currently semi-retired and may be completely retired w/i 5 years
- Will retire and stop practicing law.
- Planning to go solo
- Planning to move out of state
- Considering leaving the profession but no plans
- Planning to switch to a different government office.
- Switching from one government entity to another
- have retired end of 2019
- Possibly leave state of Utah to practice elsewhere due to new regulations letting businesses and non lawyers participate in practicing family law
- No jobs, no opportunities
- Planning to serve a senior mission/s with my wife
- Just left law firm and went in house
- Just keep working as much as I'm able
- Continue in current non traditional path
- sure would like to find steady work; who hires old women?
- Planning on moving to a different jurisdiction
- Maintain small law practice, public service, writing
- Looking for better opportunities.
- planning to start my own firm
- Retired
- Starting an additional career on the side
- No present reason (or ability financially) to ever totally retire
- We all seem to think we need to trim our clientele to only those we like to work with.
- Just retired
- Need change, not sure at this time
- Thinking about side work to supplement income
- planning to leave in-house/governmental for law firm
- As long as Trump gets 4 more years
- Planning to go solo
- I left private practice about 4 months ago to go in house with a governmental entity. Lower income, but dramatically less stress and more enjoyable work!
- Planning to change jobs, but not leave the legal profession.
- Trying to find employment
- Not sure
- I am partially retired and shifted to mediation work only

Question 50: What type of services have you tried? Please select all the apply.

- Stress reduction and mediation apps
- weight loss; worked with physician on stress issues
- Martial Arts/exercise
- exercise
- Dr./meds
- Medication
- Regular Massage Therapy
- substance/ alcohol abuse counseling
- physical therapy
- Medication
- Massage
- Sleep disorder clinic
- physician
- Prescribed medication
- Family MD
- Medication
- Family Doctor
- Family doctor
- Community Alcohol Recovery Meetings
- SSRIs
- Physical Therapy
- Tried to take a vacation, but wasn't really able to (due to high caseload and lack of coverage from coworkers) so I ended up working remotely for less hours, but not able to really take a vacation.
- Physical therapy for wrist tendinitis from working on the computer all day; regular physical fitness (but not through a gym and not through an employee health plan)
- Massage, exercise, various therapies
- Medication
- Exercise and outdoor activities. Social activities with freinds.
- Yoga practice, Massage therapy
- Job coach, personal coach
- Medication
- anxiety medication
- Massage
- Cardiology
- Xanax
- prefer not to disclose
- Family doctor
- None
- Monthly massages
- Medical
- walking, yoga
- Yoga
- Bought a stationary bike to cycle at home, downloaded the Calm app, taking walks
- Psychoanalyst
- Religious leader assistance
- Career coach
- Drinking
- fitting employment to personal goals
- Anti-anxiety medication
- Medical treatment for anxiety and depression
- Medication
- Spiritual
- Medication
- Massage Therapy
- Physical therapist
- I live a balanced life, have an enjoyable engaging hobby and get regular massage
- Exercise at home
- Alternative healing
- massage therapy, yoga, lost weight
- Medication through Family Doc
- Yoga

Question 52: What are the primary reasons you visit the Bar's website (UtahBar.org)? Please select all that apply.

- CLE Reporting and License renewal
- Licensed Lawyer Referrals
- License renewal & MCLE submission
- CLE
- search for low-income options for people who can't afford my services
- To Pay Bar Fees
- Check CLE hours
- CLE status
- CLE reporting and payment of bar dues
- pay license fees
- change contact info/NLTP research
- Registration and dues.
- Find information about another attorney.
- Pay bar dues and certify membership
- check CLE hours
- Order Certificates of Good Standing
- check my cle hours
- self help
- See my CLE completion status
- info on conferences
- See references from Licensed Lawyer
- Pay dues
- Renew my bar license each year
- New Young Lawyer Mentor Program
- Bar renewal
- check my cle
- Reporting CLE

- renew license
- Renew license
- Renew bar license
- Check CLE credits
- Register for CLE
- License renewal information
- payment of bar dues and CLE
- Report CLE
- bar licensing
- renew my license
- To pay bar dues.
- CLE transcript review
- renew
- NLTP
- Check on my CLE hours
- Ensure bar dues paid annually, CLE compliance
- Check my CLE status
- Pay annual registration fees
- CLE history
- job bank
- Renew Bar membership
- Check CLE hours
- Find information for the NLTP
- Look up bar convention information
- Check my CLE
- Pay annual fees
- Look for and provide referral information
- Please have the USB conduct CLE sessions on Fastcase -- summarize it into 50 minutes and do it online. Or offer a "how to use Fastcase" video. I might use the Fastcase research tools if I knew how -- it may be easy to figure out but I have not tried it because don't have the time -- instead I use other resourced.
- Pay bar dues
- renew my license
- MCLE credit report and updating license
- Search for information on NLTP
- Renew membership
- Pay Bar Dues
- Pay bar dues
- bar registration
- renew membership
- Renew Bar license
- attorney registration
- Check CLE status
- check CLE credits
- MCLE
- To check on my bar requirements/deadlines
- the always entertaining discipline section
- check my MCLE status and pay bar dues
- Renew Bar License
- efilng
- Look at cle
- Pay dues
- Renew license
- Find out when a lawyer was admitted to the bar
- Check CLE transcript
- Search job listings
- annual convention
- pay dues etc
- Pay annual dues
- Employment ads
- renew my license
- MCLE compliance issues
- Track CLE credit received
- Click on an e-mail link or search for an e-mailed announcement that interests me
- refer unrepresented individuals
- Confirm receipt of credit on transcript for MCLE
- CLE Hour Updates
- Find information about the clinics for a referral
- pay bar fees
- Pay fees
- Jobs
- Register for bar renewal and CLE requirements
- look for CLE forms
- NLTP
- MCLE certification/transcript and pay annual bar dues
- see bar dues
- monitoring CLE
- I don't really use it. I may start.
- Login to my own acct
- Renew membership
- NLTP forms and registration
- Job opportunities
- Check other licensing information such a CLE transcripts, etc
- check CLE status, pay dues
- Look at rules regarding active or inactive status and also for cle requirements
- Access to pay dues or provide CLE credit data
- To pay annual fees that is all
- check on my CLE hours
- Pay dues, check CLE status, etc.
- Review CLE transcript.
- stay licensed
- Update registration each year
- Bar renewal
- Certificate of good standing
- Renew license
- Pay license fee
- Dues
- Pay annual
- Check CLE balance
- New Lawyer Training Program information
- Pay fees
- My CLE status
- Pay dues
- Annual renewal.
- Check my CLE.
- View my account for payment and CLE tracking
- Pay dues
- Using my profile page for CLE and annual renewal
- Pay fees

- NLTP
- Pay my bar dues
- to obtain the general referral number
- NLTP information
- pay dues
- Renew my license
- Pay dues
- Renew license
- Pay my bar fees
- Renew bar membership
- check enrollment status
- Login/ check my transcript/ obtain contact info to submit forms for MCLE credit.
- to check on status of my CLE, etc
- License and CLE renewal
- CLE reporting
- Update my page for Find Law
- Track my own CLE credits, update information
- Pay Dues
- CLE classes completed
- License renewal
- looking at my CLE credits etc...
- CLE requirements
- re-licensing
- Check on CLE credits/pay dues
- Vote for officers, renew bar membership, submit CLE compliance
- To pay senseless bar dues
- To get forms
- Obtain CLE report
- When you have to renew your bar license
- Annual registration and tracking completed CLE.
- Check CLE transcript
- Confirm my CLE status
- pay fees
- Check on CLE status
- New Lawyer Training Program materials
- Pay fees
- Look at Bar's group benefits (not that they're that great)

- Bar Renewal Process
- Check CLEs, NLT mentor program info
- Find a lawyer to refer work to.
- Check my CLE status
- Beneplace
- Find my current CLE status
- CLE status and billing status
- Trying to create a successful Irrevocable Trust practice
- Renew my license
- renewing license
- Pro Bono Opportunities
- track CLE hours
- pay bar dues
- Check on my CLE compliance.
- Just to renew my license
- Looking up CLE rules, status, procedures
- Practice portal
- Commission agendas
- Renewing my license
- Check on CLE status
- pay bar dues
- Jobs
- License renewal
- CLE compliance, payment of bar dues
- Mentoring issues
- Check My CLE hours
- To pay fees
- dues
- Check CLE status
- Actually I rarely visit the website just annually
- CLE compliance
- Renew license
- Personal account information
- Check on my CLE progress
- renew licensing fees
- Get forms
- Verify my bar status for employer
- Pay dues
- Pay bar dues

- Look at member services
- Only if I have to to renew license
- CLE reporting and annual dues
- Review Leadership agendas and materials
- Bar renewal
- CLE
- Pay bar dues
- CLE compliance

Question 53: What improvements or services would you like to see added to the Bar's website? Please select all that apply.

- unable to effectively answer this question
- Bar Books
- Increase on-line access to continuing education.
- A lot of people don't know about all the information available on court website including forms and instructions so a link to that or similar information on Bar site would be good for newer attorneys.
- better legal research options
- Access to common legal templates
- Not Sure.
- Free access to law school journals and articles, or Hein Online, etc.
- Works ok for my needs.
- None
- none
- I am not impressed with Fastcase. I think CaseMaker was better.
- No suggestions
- Hard to find contact information.
- More resources relating to transactional and estate planning practices
- access to licensed lawyer should be open to me once I get into my portal. I cannot access this separate system so I cannot help the people who attempt to contact me through the Utah Bar. I have tried contacting the bar but nothing gets done.
- Open it up to other practices such as govt. and criminal rather heavily focused on traditional civil/private practice.
- In theory I guess it is always possible to improve, but on the whole, really appreciate the bar's website. thank you!
- reduce fees
- no comment
- pretty good; not necessarily great. don't want to pay for more changes
- Search for attorneys by location and specialty
- Reduce the services and reduce the fees
- No
- easier access
- In all honesty, I can say it is one of, if not the, worst navigable websites I've ever experienced. Additional links and buttons that could be better streamlined, etc.
- Update Section information regularly. Bar Staff should be doing that, not Section officers
- Easier way to review the CLE requirements for Utah without having to open the separate rules website. This should be listed prominently - it's not complicated information
- Create a marketplace that means something with real savings. I can match all the "savings" by directly contacting the vendors.
- NO BASIS TO COMMENT
- No particular ideas
- Why fast case?
- Better online CLE
- FastCase does not work well for me.
- Chat or message feature for asking questions
- acknowledgement that in-house lawyers exist
- The website wastes too much space on graphics/images
- It's okay
- It's fine; not great, but fine
- Install a quick and pithy program teaching how to use Fastcase.
- I use it for what I use it - not sure what else I would use
- more information on attorney benefits or discount programs
- Mostly it drives me crazy each time it changes and I have to learn to navigate a new site.
- Allow search for lawyers by law school, include lawyer undergrad in profile data
- not sure
- go back to former research tools which included administrative (workers compensation) decisions
- Free Cle
- Easier to see CLE "report card"
- Don't know
- ?
- I have no comment on this question
- no opinion
- I find the site really helpful! I clicked the other boxes on the premise that it is probably always possible to make improvements. thank you for the hard work that has gone into improving it. Much appreciated.
- Improve licensed lawyer
- Take AMEX for dues, especially if you are going to charge me the fee anyway.
- Online CLE adding of hours. Wyoming does this and it is fantastic.
- Better marketing of lawyers and their services to the public
- I don't use it enough to have an opinion.
- Make the CLE requirements automatic if the records show the CLE requirement has been met.
- n/a
- The website is a disaster. It is impossible to find what you need easily.
- More information about different sections of the Bar.

- Somehow create a searchable index of the published public discipline on attorneys. The currently available PDF is not searchable, not organized chronologically, and generally not useful.
- I don't know
- can't answer intelligently since I see it so infrequently
- Haven't found Fastcase to be very user friendly, preferred Casemaker
- it is extremely difficult to navigate. Can't find contact info for bar staff. Very difficult to find and navigate ethic's opinions. It is 2020, there is no excuse for having such a poor site.
- I like the way the ethics opinions were organized before better. I have a harder time searching them now.
- Tell me what I should be looking at on the website each month
- It's meh, which is fine.
- I miss the free online research
- Make search and navigation more intuitive
- More remote CLE available
- Make it easier to find lawyers.
- i do not know
- Casemaker. . . new system is insufficient and subscriptions difficult to manage at small firms.
- Access to appellate cases prior to 1950
- maybe remind us to use the site - for some reason it never occurs to me - like I don't know exactly why i would want to access the site.
- I don't care what you do - Bar "services" are a waste.
- I'm not that familiar with it.
- Accept American Express as a means of payment
- ease of finding employment
- I don't like it but I don't go there often enough to remember why I feel that way.
- simplified CLE information
- needs a complete overhaul, given the last "overhaul" was poorly done and very poorly rolled out; it's shocking how many broken links there are, etc etc.
- Don't Know
- divide so you have just lawyer part
- Provide system to get clients without having to compete (e.g., be the first attorney to call/email) - maybe a round robin type system
- no specific comment
- simplify legal education course selection and accounting
- cles available remotely, particularly professionalism
- Improve the reporting of CLE, so we don't have to fill out a paper report. It should all be done on line quickly
- Don't care
- don't care. the bar does absolutely nothing for me or my friends
- Website needs a MAJOR rework from people that don't work for the bar. Go out of state.
- Ease of use,
- I only use it to find other lawyers
- Reduction in fees charged for services
- no opinion
- I don't know. Seldom use it.
- Not sure but keep improving.
- No more Fastcase! Casemaker was much better.
- Don't use enough to assess
- Salary data
- Don't know
- I don't see the need
- fewer clicks to get where you want
- unknown
- I don't use it enough to have an opinion
- none
- More on-line CLE opportunities
- Retired
- Better Member Benefits and Better Disclosed --
- Love Fastcase as better alternative to Casemaker but want it to go back to Territorial Decisions
- I bookmarked the member search because it's difficult to find.
- Don't know enough to state opinion
- No opinion
- haven't spent enough time looking at it to have an opinion
- I only care about CLE
- none
- I am a military attorney on active duty. I only use the bar website to maintain my licensing requirements. I am not the best source for feedback on the website.
- Better calendaring of section meetings and locations
- any option that will result in lower bar fees for gvmnt attorneys
- better legal research services
- none
- Make the bar site more like the Wyoming bar site.
- easier way to navigate to pro bono opportunities
- Figuring out how to renew your license and check your CLE credits is so clunky. I thought I was done but I wasn't and got hit with a \$100 fee.
- It seems to still need some work and attention to detail.
- Better legal research
- Most of the website is unnecessary. Better to stop paying for the extras and give us a break on our bar dues.
- No opinion
- Mandate email addresses for all attorneys
- I don't use it enough to know
- Get rid of Fast Case and return to Casemaker
- Streamlined resources for those of us not in litigation-centric careers. I am sick to the teeth of CLE and ethics lectures about client trust funds and billing practices that do not have any relation to my work.

- None
- More good information on attorneys who specialize in a specific area of law. More listings for pro-bono opportunities.
- N/A
- provide option in CLE search to search for online classes.
- I have no idea, I don't use it much. What is fast case?
- Job posting board would be very useful.
- legal research need b more user friendly
- I haven't thought about it.
- Website sometime unreliable and glitchy
- ability to report MCLE online
- The website is incredibly confusing and not user

- friendly at all.
- Real people available in real time to answer questions, especially ethics issues that arise.
- I note that I am licensed in NV and I visit their website weekly because they have free legal research
- Unsure
- Too many needed changes; no time to list them all
- The fee dispute resolution service which has been very helpful is hard to schedule.
- I would like Casemaker back
- Not sure
- Don't care
- Navigation is confusing

- better case search engine
- Develop a site that does not require DeLorean with Huey Lewis playing to access
- n/a
- don't know
- integrate with practice management software and xChange
- I never use the sight and have no need for it
- CLE registration and submittal process is not clear. Hard to navigate.
- Instructions on how to delete/remove stale "My New Referrals" appearing via Licensed Lawyer
- Eliminate approval charges for videos that have been approved by others already.

Question 55: What sections of the Utah Bar Journal do you read most often? Please select all that apply.

- I generally skim all of it.
- Utah Law Developments
- Inside cover to learn about the cover photo
- Case Law reviews
- Case updates
- updates on the recent appellant cases
- Case law updates on the Appellate Courts
- ads
- Only those things that seem of interest.
- All of the Above
- Paralegal Division
- the whole thing
- case reporting
- all of it
- Not applicable
- legislative updates
- Case updates
- I read almost the entire magazine.
- Ads from firms

- Articles summarizing appellate cases
- Appellate Case Review
- announcements about peoples employment
- all
- Reports of recent cases
- Ads for firms to see who is where
- Case law updates
- Updates on court opinions
- I ALWAYS read the appellate highlights section. Very useful.
- appellate updates
- I look at the advertisements
- appellate highlights
- All
- YLD Articles
- Read it all
- recent cases summaries
- Report of Appellate Rulings
- all of it

- Info on CLE
- appellate case reviews
- varies
- Outcomes regarding cases up before the Utah Supreme Court and Court of Appeals.
- Appellate case summaries
- Case Summaries
- it varies
- I think the Utah Bar Journal is a bit much - seems like a popularity contest of all of the white men in power in Utah. Compare to the bar journal for New Mexico - we need more diversity and inclusion. It's a major put-off, and, combined with personal experiences of discrimination in the legal field in Utah - the glass ceiling is alive and well - makes me feel like I will never belong.

- Young Lawyers Section
- interesting article
- honestly I thumb through it and stop if something catches my eye
- Table of Contents. Then if something interesting, I read it.
- case updates
- stuff relevant to my practice
- I read the entire publication. Back to front.
- Case updates
- current case law
- Appellate Summary
- recent appellate decisions

- Case law updates
- Appellate law update
- skim it
- Summary of appellate court decisions
- CLE
- Topic of interest
- Case law update
- All
- I usually flip through the entire issue
- Review of Utah Appellate Decisions
- Legislative updates and court decisions
- Featured photo on the front cover
- Whatever catches my eye.

- Appellate updates
- CLE, whatever catches my eye
- CLE schedule
- What interests me.
- Read the entire journal
- Appellate review
- MCLE
- New published cases
- Appellate case summaries
- Appellate highlights
- You know this
- case summaries

Question 56: What sections of the Bar Journal do you find most useful? Please select all that apply.

- if i had time I would read substantive articles
- Appellate Highlights
- Case law review
- case summaries
- Provides excellent reminders.
- Paralegal Division
- Summary of recent case decisions
- not sure
- case updates
- Utah Law Developments
- legislative updates
- case summaries
- Ads stating where colleagues are now officing
- None would be an overstatement, but rarely does an article have use for me
- I find it all useful
- case updates
- Ads from firms
- Appellate Case Review
- all
- CLE calendar
- All

- Case law updates
- Updates on court opinions
- appellate updates
- Advertisements
- appellate highlights
- All
- Appeals and Supreme Court decisions
- CLE
- Info on CLE
- appellate case summaries
- varies
- Appellate court results
- Appellate case summaries
- Case Summaries
- it varies
- Nice to see the direction each president wants to go, and I appreciate the recent focus on lawyer health and wellness.
- Young Lawyers Section
- case summaries
- Each has been useful on occasion, but none are always useful.

- case updates
- case updates
- appellate decisions
- I read the publication and if there is something relevant to me I read it
- current case law
- Appellate Summary
- Appellate rulings
- Summary of appellate court decisions
- Case law update
- Updates on recent cases
- Review of Utah Appellate Decisions
- Legislative updates and court decisions
- Whatever catches my eye
- Na
- I do at times read the ethics portions but find that some of it is given great lip service but rarely practiced.
- Appellate review
- Appellate report
- don't know
- Appellate highlights

Question 59: Is there anything you would like to see added or changed with respect to the Utah Bar Journal? Please select all that apply.

- More in-house content
- Dedicate each edition on one substantive area of the law. See the Nevada bar journal.
- More judge articles
- All the information in the bar journal could be done electronically and on the website.
- Let us look through the archives for specific topics (maybe we already can? Not sure)
- no suggestions
- There was an old article about how to bail out an arrested person. These "how to" sections in areas that I don't practice in (yet) are very helpful.
- Electronic only not just to reduce bar dues, but also in consideration of the environment.
- There should be more information on comment periods and other items of interest that should be reviewed such as the regulatory sandbox. Making people aware of such changes so they can review and comment would be helpful--beyond just an article. There needs to be a bolder attempt to get the notices out to the legal community.
- it's probably 'greener' to offer online only, but I might not read it as much.
- The bar journal is first rate.
- Fewer editions
- articles helping lawyers to be more considerate and well balanced.
- More articles related to in-house practice
- xxxx
- Eliminate print for environmental concerns
- NO BASIS TO COMMENT
- Articles are often too esoteric
- NA
- More articles relevant to in-house lawyers
- The same people submit articles it seems
- There is very little content relevant to my practice in patent law.
- Litigation section
- I would like a section that opens up for discussion the things that we as lawyers feel that the bar is doing poorly and ways the bar should be protecting our interests better.
- Specialty practice sections each month.
- include more articles related to criminal law
- More content for in-house attorneys
- Eliminate the bar journal. It is a waste of time and money.
- engage a wider range of authors
- none
- Less litigation focus and more on corporate and real estate
- Update on procedural issues
- a few more in-house specific articles
- I have no comment on this question
- Solicit and talk about issues with the application of rules. For example, discussion on how Rule 45 refers to motions to compel against non-parties be done in compliance with Rule 37... which now talks about Statement of Discovery issues and doesn't mention non-parties. An article talking how to practice in a way to bridge these issues would be helpful.
- it's heavily tilted toward social justice stuff, which is irrelevant to my practice. just throw it away
- printed on more sustainable paper and finishing process.
- less ads
- More transactional law articles
- Journal doesn't really fit my practice very well.
- I don't know
- Expert witness directory like the State of Arizona does would be nice
- Less frequent - or different versions based on practice
- no suggestions
- no suggestions
- Articles for lawyers who are not litigators; in-house, etc.
- seems like the same people write the articles every time. Especially on ethics.
- broader author base. You always see the same people writing articles.
- It's fine
- more personal experience articles, not just substantive legal articles
- I have called and called but for some reason nobody can figure out why I am no longer receiving my print journal. They just stopped showing up one day. A section on real attorney thoughts, life, experiences. A section inviting ideas for change along the model of Justice Himonas' initial ODR brainstorming sessions.
- Tips for solos
- Improve classified ads section. Hardly any opportunities posted.

- Articles on law fairness, justice in courts,
- I would love an advice section.
- I think it's great the way it is.
- I understand the discipline section has resulted in suicides. It would be nice to find a way to reduce that impact.
- I like the photo submissions
- Articles on collection law
- Solicit articles from outside the big name law firms.
- reach out it is a good ole bar member club. Get input from real working attorneys
- Teach kindness among lawyers
- more non-litigation topics
- no opinion
- Have a focus for government attorneys
- More scrutiny of accuracy of substantive articles
- diversity and inclusion. How about an entire issue only with women contributors talking about their experiences with discrimination in Utah? How about an issue by people of color? This is such a white state. Seems like a concerted effort needs to be made.
- note specific current legal issues extant , regardless of area
- Office Practices/Management section
- Change editorial staff more frequently.
- The substantive article are dry - assume you already familiar; make them or practical and more simple
- Provide a better understanding as to why the Bar benefits me and/or the profession better explain why the bar takes some positions and not others.
- get rid of all the Diversity and Inclusion garbage. It is truly offensive and worthless crap.
- add some aspect of Intellectual Property to each issue
- any option that lowers the bar fees for gvmt attorneys

- more info from government/criminal attorneys
- Please DON'T stop giving us the print copies. I would also like to be able to search the previous journals--right now it is EXTREMELY difficult. I would like an easier way to search for topics and a better search bar.
- I feel that civil trial work is underrepresented in articles.
- Do a call for submissions so that others can be reminded to participate and the authors/subjects can be more varied.
- The articles are generally way too wordy and long
- Bit more variety on authors. Same author writing an article every time means I pretty much skip it.
- The aesthetic feels very outdated. I would like more corporate related content because everything is so heavily skewed toward litigation like this survey. I have no idea what district we are in when I don't go to court.
- No idea
- Include criminal prosecution perspective.
- More articles about diversity
- More focus on small firm practices and procedures
- Non traditional field articles
- Stop going on about not printing it. Just print it!
- Don't' read enough to comment
- More detail on cases reported
- Less defense oriented involvement
- Electronic to reduce dues and environmental impact.
- If it significantly lowers dues, I am happy to access on line.
- It is primarily litigator oriented. Would like to see more relevant to in-house
- Judge and commissioner articles.
- more content for non-litigation attorneys (transactional law issues)
- Efforts should be made to have the Journal

searchable electronically both present and past editions.

- Not sure
- How to articles on start to finish handling of cases in various areas of the law, forms etc
- Don't care
- More intellectual property articles on cutting-edge issues
- More government attorney articles/input
- Not sure.
- I do not like the civility articles that amount to being told to be nice over and over
- Content by randomly-selected members to moderate influence of insider cliques and cabals
- More helpful in depth articles
- Include some IP content
- Create a "Women and the Law" section with articles written by female attorneys to help women in the legal practice

Question 62: If you do not attend the Summer Convention in July, please select the reasons why below: Please select all that apply.

- Government practice, most sessions don't apply to me
- Family vacation
- Scheduling conflicts
- scheduled during my pre-planned summer trips
- July is a busy month of family travel. It would be better in early June or mid-august than in July.
- When I go on vacation, even for a few days, I don't want to attend legal training or do any legal work. I want to enjoy the time away from work with my wife and our children, my precious family.
- None of my friends attend
- conflicts with family vacation
- Not know any attendees
- Out of state and travel a lot for work
- Office will not pay
- kid
- Office unlikely to pay to attend
- I do attend.
- It's all in SLC. Need more in Utah County.
- Too many other family activities in July
- The amount of CLE credit available as compared to the time commitment to attend.
- If traveling for a multi-day event, I prefer to spend the the time with family.
- Lack of childcare
- NA
- None
- Not interested
- No longer plan family vacation time in conjunction with attendance.
- I can't make it south for the spring convention as usually have other things going on.
- Would like more interesting locations
- I attend.
- just transferred jurisdictions so haven't really explored much
- conflicts with other appointments
- Conflicts with family summer vacation plans
- Mostly the CLE isn't what I need/want
- I focus on my specialty and attend national events
- No interest
- government lawyer. Work wouldn't pay for it, and it's too expensive for out-of-pocket
- I have never found the topics to be very useful to my practice. When they do relate to my practice, it appears that the speakers are not actually experts in the areas the present on. In some circumstances, the information they provide is plain wrong.
- not a great time usually conflicts
- Education Law
- I try to go off years alternating annual meeting then Spring
- I don't attend when it is in Utah, only out of state. It is part of my vacation plan, and going to Park City is not a vacation. It is too close to the office.
- My organization will not pay for conventions held out of state
- N/A
- Conflict with other activities (family vacation)
- I only attend when it's in Park City
- my work will not pay for it (but i don't think it is too expensive)
- Work conflicts
- scheduling conflicts
- Please return to Sun Valley
- Summer trips with family and reunions, lot of ti.e already scheduled off in the summer
- Conflict with summer family events
- Usually on vacation
- I do attend
- retired
- Haven't been because first year lawyer. Plan to attend
- A
- I attended.
- introversion
- There is little content relevant to patent law.
- needs to be in a great location
- I am a single mother and I cannot afford to attend with my children (both in time - trying to coordinate with their summer activities - and money - taking whole gang along - and what to do with them when I'm in conference. I am from out of state so limited childcare options.)
- Timing does not work in my calendar
- I have very young children and it is difficult/expensive to find all-day childcare when I am not bringing in an income
- Employer won't send me
- conflicts with my personal vacation plans
- I have not been a licensed attorney in the summer yet.
- NA
- It rehashes the same issues
- conflict with other travel and events
- I'm brand new and haven't had the chance

- go back to sun valley
- California is too far. I would like to see these events in other locations throughout the state or in neighboring states.
- I have other things that I do in July for personal travel and family.
- I won't attend if it is in Park City.
- Too many other things to do in summer
- Away on church service
- As a brand new lawyer I wasn't really in the position to make the attempt.
- no desire
- I like Sun Valley over Park City
- I have occasionally attended these events, and I enjoyed them
- No government attorney content
- conflict with other activity
- I don't want to go by myself and don't know anyone else going
- sometimes I do not attend because I am out of town during that time,, and/or I don't need the CLE
- I don't feel a part of the "club"
- Time conflict.
- GOVERNMENT
- i only attend when it is Sun Valley or some other place that I can get away from the office.
- I attended yearly in private practice, but as a government employee, I have to pay for myself.
- I have not been in practice long enough to know
- Programs aren't "hands on."
- Locations that aren't interesting, like Park City.
- na
- no reason
- I like the idea of attending in Park City or Sun Valley, California is too far away.
- CLEs really are geared towards litigation. Often, not enough for non-litigators.
- Employer doesn't support attendance
- poor programing
- I generally attend conference offered through the AOC

- Going to Park City is boring and not a real escape from work. Move it out of state again!
- If it's in Park City, I may go, but won't take the family. I'll drive up every day. The venue isn't that fun/family friendly compared to Sun Valley or San Diego. We went last year as a family and didn't really enjoy PC.
- My "peers" don't seem to attend. I don't really know the attendees. It's "cliquish"
- seems to be a big firm clique
- would love to go back to Sun Valley!
- attended but not a box for that so I could go on with survey
- I attend both conferences for my section annually.
- Work for government who doesn't pay for it
- scheduling conflicts
- It is too proximate to SLC, so not as interesting as a work/family trip
- Former employer did not approve out-of-city CLE
- timing does not work with my family's schedule
- For the last few years, I obtained CLE elsewhere. Now I'm in private practice and will be more likely to attend.
- Family and/or court conflicts
- When you hold it at Park City, I do NOT attend. It is too close to my office and my clients expect me to continue working for them while I am attending the Convention. I love Sun Valley because it is the perfect distance from my office. I can drive there and my clients do not expect me to do their work while I am there. Please return to Sun Valley.
- I don't find the Park City location conducive to focusing on the CLE
- Too much going on in the summer
- Not permitted to attend unless pay for it myself
- Most always attend if at Sun Valley, but not as motivated when elsewhere.
- I have to bill 8 hours per day. If I attend a CLE I have to Bill it to a client.
- I do attend.

- Too expensive to spend time in extra stuffy setting
- schedule
- It has a good ole boy country club vibe.
- Not relevant to my work
- COMPLETELY UNAFFORDABLE could not even imagine something like this. Also would have to use paid time off to attend and I get so little.
- I am on the ABA International Law Committee and use my firm CLE Budget to attend that conference
- I just started practicing in Utah
- Typically take family when I go, so conflicts with their schedules. And, we did not go when in Colorado.
- My office is not supportive of it
- The CLE offerings are generic and unhelpful
- basically retired
- I wanted Sun Valley. PC isn't worth it
- Why not sun valley. The canyons is not park city and is not well suited for a conference
- Care for ailing spouse
- I preferred when it was in Sun Valley.
- My July schedule is full of family events
- I attend if it is in Sun Valley
- I used to attend when I took family as part of vacation.
- Conflicts with Industry specific event every year
- Some times schedule interferes
- Retired
- July is usually when I take family vacations
- Often conflicts with family activities
- Because I don't want to see my ex
- CLE waived
- Usually on vacation with family.
- Have not had the chance
- I go to the spring convention every other year
- usually timed when I have other vacations.
- Family vacation tradition

- I have no interest in attending the Summer Convention in Park City. I will only attend when it's out of state.
- Usually outside the country in July on another professional pursuit
- July is the only time I can take vacation and I don't want to spend it doing CLE without my family.
- I have other activities in the summer
- Other summer activities.
- Usually have other obligations in July
- I like going out of state for the convention.
- It's not in Sun Valley anymore.
- I attend
- I'm not social.
- To busy
- I only wanted to attend on Friday.
- Scheduling rarely works in July
- I try to attend
- I wasn't a lawyer at the time
- Expense and lack of interest
- Timing and schedule conflicts
- Summer is a busy time of year.
- I am not from here and don't know people out of my specialty
- I once went to the convention in St. George. Biggest gathering of conservative white men outside the mormon church. Too much to handle.
- Hard to do when outside Utah; I would also like to keep the monies in Utah
- retired, no interest
- Bar seems increasingly irrelevant to me.
- A few years ago, I came to a dog and pony show at the Bar when it was contemplating adding some in-house practice content to the Summer Convention. After the dog and pony, I never heard what happened with that. Did anything happen?
- have not had the opportunity yet
- I'm too busy

- my grandchildren come if from Florida, they are more important to me
- Have never needed CLE at that time.
- No interest.
- I do not like it being held in Utah
- It is ridiculous that a State entity is going to go to another state to go to a ski resort for a meeting. I think we should support Utah industries and business not the competition.
- Bad timing - it is always in July and July is too busy
- I liked it when it was in Sun Valley
- I attend when it is held in San Diego
- I went
- It's not in Sun Valley-not taking time off to go to Park City
- My work does not cover my registration or travel.
- It's a good 'ol boys club targeting law firm attorneys. I'm neither old nor a boy nor ever practiced in a firm. And I don't desire to ever practice in a firm..
- vacation days utilized for other activities
- Busy time of year
- You do not have it out of state. Like to travel to the convention.
- I usually attend the Summer Convention if it is in Sun Valley
- Seems more of a perk for big firms.
- Vacation scheduling conflicts
- I attend when in Sun Valley. Park City sucks. Move it back to Sun Valley.
- summer is busy
- No desire to attend a conference in Park City when I live in SLC
- I am back in Wisconsin 4 months of the year
- other conflicts
- Employer wont pay
- Don't want to spend that much time hanging around with lawyers.
- I'm doing other travel during the summer
- I do attend the summer convention in Park City.

Keep it in PC'

- Don't like the venue
- Often conflicts with the RMMLF Annual Meeting, content is usually focused for litigation
- It's not a friendly, congenial atmosphere.
- I attend the free AG CLE it is free
- Out of the State
- I am 85 and near retirement
- Not sure
- conflict this year
- Military stationed in Virginia
- Retired
- Work load
- It seems geared for the big firm, big money practioners - the elite or elite wannabes. Really, it was the expense and because what time and money was available for summer vacations was spent with the family - not separated from them in seminars most the day. I've heard it is fun for those who can go but I've never been - ever - so maybe I should not be allowed to critique.
- Too many lawyers in one place
- I do attend unless I have a schedule conflict
- Why would I want to see other lawyers in a recreational setting?
- Not now needed
- My family no longer is interested in attending with me, so it's a lot of time and money for CLE that cannot meet my needs in Intellectual Property; and it was not very much use for networking in the past.
- Lame. It's a tax write-off vacation more than anything else. Nobody goes for the CLE primarily.
- I attend section meetings which I find most valuable.
- I didn't know about it
- I attended

- conflict with other summer activities
- Fighting to keep my job (as I watch the others fall)
- I attend
- Too expensive for government attorneys and usually nothing related to us.
- I have been dealing with personal issues for a few years and those have had to take priority.
- \$\$\$\$ Plus, in the past, dubious benefit for small firms or solo practitioners. In 27 years, I've never bothered to attend a bar convention. I have always found better, more germane, convenient and cheaper CLE opportunities. Now, as a

- judge, it is even less germane to what I do.
- I spend all day with lawyers, spending several days with them is...dreadful
- If it was in Hawaii, I would attend.
- I do attend, basically every year if my litigation schedule permits
- I try to attend
- little of relevance to in-house counsel
- Go back to California. We used to go there regularly.
- I attend
- long hours at work + small children at home = frazzled wife; I need to relieve her

- Park city does not seem like a retreat. Too close to home
- Going to Park City was not as attractive to me as Sun Valley
- Don't want to hang out with lawyers
- I do attend
- Program included too much indoctrination on political correctness issues
- Activities seem to be skewed to a certain bar segment.
- Don't like Park City venue

Question 63: If you do not attend the Fall Forum in November, please select the reasons why below: Please select all that apply.

- Had other obligations
- Not know any attendees
- Office will not pay
- kid
- Not applicable: I generally attend.
- I do attend the Fall Forum
- same as above
- no comment
- I'd rather go somewhere warmer in November and holidays are too close around the corner.
- Lack of childcare
- I attend
- usually get my cle somewhere else.
- Not interested.
- I do attend
- I was otherwise engaged, but usually I try to attend, as it is super convenient to have it in SLC
- same as above

- I do attend the Fall Forum
- I do attend Fall Forum
- see above
- No interest
- S
- government lawyer - works doesn't pay for it
- Got very sick due to altitude, had surgery and will consider in the future if doctor clears me for park city elevation
- no Estate Planning or Probate programs
- Just time issues
- na - I attend
- scheduling conflicts
- Not applicable
- Usually am locked in to other work
- Not interested in attending for any reason
- Retired
- introversion

- If I go to spring, I do not go to fall. I enjoy both programs.
- Scheduling conflict with other annual meeting
- I have very young children and it is difficult/expensive to arrange childcare when I am not bringing in an income
- I am only in my first year as an attorney.
- The date did not line up for me - scheduling
- I often attend the Fall Forum
- Attend
- scheduling doesn't fit
- I'm brand new and haven't had the chance
- I would prefer to go somewhere else than downtown Salt Lake City
- I attend
- I attend it when I am able
- Away on church service
- See Above

- No government attorney content
- conflict with other activities
- I was otherwise engaged, but usually I try to attend, as it is super convenient to have it in SLC
- i try to attend
- I went once and thought it was not a valuable experience.
- Time conflict -- often out of town.
- GOVERNMENT
- If I am coming downtown for a block of hours, it will be to work.
- Good ol' boys (and girls) club. The same people go year after year and year.
- Programs aren't "hands on."
- I attended the Fall Forum opening.
- I go to the summer convention and get my CLE
- no reason
- Scheduling didn't work out
- CLE's really are geared towards litigation. Often, not enough for non-litigators.
- I generally attend conference offered through the AOC
- I do attend
- While I could find the time, it is inconvenient, and I can find better CLE elsewhere.
- Don't feel it is necessary if I attend Spring and Summer
- I attended.
- I do not like Salt Lake
- Timing did not work in 2019 due to trial prep
- Forget to sign up.
- See comment to previous question.
- I attend
- I attend
- More interested in regularly conflicting Ronald Boyce Litigation Symposium
Even the tracks that are labeled "transactional" are seldom applicable to a practicing corporate generalist in a large firm--very litigation oriented in Utah
- Because of the billing practices of the AGO.

- good job
- Not sure. Don't know much about it.
- I go about every other year -- generally enjoyable, interesting - but not usually that relevant
- I did attend
- I attend the judicial conferences which take my time
- schedule
- Would have to take paid time off to go. I get so little and would not use it for something like this.
- I had planned to attend this year, but had to travel out of state during the Fall Forum dates.
- I just started practicing in Utah
- Preparing for year-end transactions is underway at that time.
- Office not supportive of it
- I attend Fall Forum
- The CLE offerings are generic and unhelpful
- retired
- I do attend when I can
- Care for ailing spouse
- Schedule conflict
- Doesn't fit my schedule
- W
- Retired
- Just haven't tried it yet, but I will
- Poor question since I do attend
- I do attend
- Just couldn't get the time off work
- Have not had the opportunity
- I go to the spring convention every other year
- I stand the Fall Forum
- I usually attend
- I will likely attend.
- I attend
- I attend.
- I wasn't a lawyer at the time
- Conflict
- Expense and lack of interest
- Timing and schedule conflicts
- I am not from here and don't know people out of

- my specialty
- I was busy this year but have gone other years
- retired
- Quality of CLE does not justify taking time off from the office
- lately I've signed up for NBI annual membership and can partake of many seminars
- have not had the opportunity yet
- I'm too busy
- Have never needed CLE at that time.
- No interest
- N/A
- I occasionally attend but is has ben a few years
- Not on my radar
- I attend regularly
- Work does not pay for this CLE
- I attend
- N/A
- See above.
- I do attend
- Didn't know about it
- military law, so I have a CLE exemption
- Conflicts with other obligations, plan to attend in future
- Inapplicable content
- Never even heard of it
- It's a good event. I need to budget time for it.
- Usually traveling out of the country
- I really don't want to spend that much time with other lawyers. Prefer CLE's in bite-sized pieces. Better things to do with my time. I suppose I don't see value in the all-day / multi-day CLE..
- Dates weren't good for my calendar.
- Attend other bar events
- Never heard about it
- I attend the AG CLE it is free
- out of the state
- I limit my work to defense of state and federal tax cases.

- Military stationed in Virginia - CLE waived
- I do attend
- When I need the CLE, I do attend. It is a good price, convenient location and usually good info.
- I go to the summer convention.
- See above
- Schedule conflicts
- If I am going to attend a multi-day event, I prefer to go somewhere outside of Utah
- Not now needed

- When I look at the entire list of factors above, it just never seems like a worthwhile expenditure of time and money. However, the ADR does interest me.
- Not relevant enough to my practice to justify the time and expense.
- I typically attend it.
- I didn't know about it
- prefer Spring Forum and location
- I have been dealing with personal issues for a few

- years and those have had to take priority.
- I spend all day with lawyers, spending several days with them is...dreadful
- I try to obtain
- little of relevance to in-house counsel
- Out of town
- Don't want to hangout with lawyers
- Don't like Park City venue

Question 64: If you do not attend the Spring Convention in March, please select the reasons why below: Please select all that apply.

- Other obligations
- School aged children + spring break
- It hasn't worked in my schedule recently.
- When I go on vacation, even for a few days, I don't want to attend legal training or do any legal work. I want to enjoy the time away from work with my wife and our children, my precious family.
- Again, I don't know any of the attendees
- Not know any attendees
- Office will not pay
- kid
- Just never tried it
- The time commitment to travel to St. George.
- Its in St. George
- Too far away. Have to take time off to travel to St. George.
- same as above
- It falls during Spring Break in St. George
- Lack of childcare
- I have attended two years in a row
- Not interested
- I do attend
- That time of year always seems to be busy.

- conflicts with family schedule
- No interest
- govt lawyer - work doesn't pay for it
- I attended but could not move forward in survey without selecting a choice
- need estate planning & Probate
- Time issues
- Other priorities. Don't need the CLE.
- Government does not cover. We get cheap CLE through the office and do not earn enough to attend Bar conferences.
- Not interested in going to St. George.
- I do attend
- Not interested
- Conflict with other activities
- scheduling conflicts
- Schedule conflict
- Not applicable
- These are always SUPERB and I live in St. George!!
- Not interested in attending for any reason
- Retired
- I attend.

- Attending
- Introversion
- i do attend the spring convention
- Time of year is not convenient to work
- If I attend Fall, I do not attend Spring. I like Spring the best.
- timing conflicts with another conference I must attend
- I have very young children and it is difficult and expensive to arrange for childcare when I am not bringing in an income
- Timing issue
- I have not been an attorney in the spring yet.
- Inconvenient timing
- I almost always attend the Spring Convention
- No time with work schedule
- I'm brand new and haven't had the chance
- I attend
- I always attend this convention.
- Away on church service
- I was out of state.
- I attend this event

- It is usually held in St. George, which is too far to travel for a program that is not that relevant to my practice.
- No government attorney content
- I just don't usually have time to drive that far south, but I think it makes sense to have one of the conventions in that area, so wouldn't advise changing it.
- I suspect it won't be a valuable experience.
- Time conflict -- often traveling.
- No offense, but the crowd that attends the Spring Convention is not my crowd. At all.
- Have not yet had the opportunity
- GOVERNMENT
- If the program is good, I attend.
- I attend
- Programs aren't "hands on."
- na
- I go to the summer convention
- I attend
- Family Issues
- CLE's really are geared towards litigation. Often, not enough for non-litigators.
- Schedule conflicts with family events
- Employer does not support attendance
- I generally attend conference offered through the AOC
- I do attend it.
- legislative session often overlaps
- The attendees and programs really don't address my practice.
- I attend
- I attended
- Work for government who doesn't pay for it
- Former employer did not approve out-of-city CLE
- Timing with children's spring break non-compatible
- See comment to previous question.
- Other family plans
- no applicable - attending
- Not permitted unless pay for it myself

- I attend
- Almost always conflicts with trial schedule for some reason
- I do usually attend.
- Because of the billing practices of the AGO
- I usually do and like it. ssa
- schedule
- Would have to take vacation time to attend something like this . I get so little and would not use it for something like this.
- Family and/or I have conflicts that make going difficult.
- office not supportive
- The CLE offerings are generic and unhelpful
- retired
- i attend
- Care for ailing spouse
- I attend it every couple of years.
- Retired
- I do attend
- I do attend
- Too busy with tax work
- I'm in St George but this years has zero relevant sessions, so I'm bummed and not going to waste my time.
- Have not had the opportunity
- Timing
- I stand the Spring Convention
- March is my busiest month of the year.
- I usually attend
- I attend
- I'm not social
- The Spring Convention conflicts with the last week of the legislative general session. I have never attended it for that reason alone.
- I was not a lawyer at the time
- I attend it.
- Timing and schedule conflicts
- I am not from here and don't know people out of my specialty
- Money, distance, and time are the reasons when

- I do not go (which has been five years or more)
- retired
- Program not strong enough. Focus is on golf
- have not had the opportunity yet
- I'm too busy
- I have attended it
- No interest
- I regularly attend this meeting
- I usually go but occasionally miss it due to timing
- Not on my radar
- Work does not pay for this CLE or travel.
- See above
- I do attend
- I. DON'T. GOLF. I find the planning of professional events around golf to be insufferable.
- AG office has no CLE budget
- Usually traveling out of the country
- same as previous answers
- Dates aren't always good with my calendar.
- I attend the AG CLE it is free
- out of the state
- Sometimes timing
- At age 85 I am pretty selective in what classes I attend
- Military stationed in Virginia - CLE waived
- I do attend, even sometimes when I don't need the CLE. Great location for the time of year. Relatively cheaper and easier to attend.
- I attend the summer convention.
- See above
- If I am going to attend a multi-day event, I prefer to go somewhere outside of Utah
- Not now needed
- I love the event and attend almost every year, absent some serious time conflict for its weekend.
- Not relevant enough to my practice to justify the time and expense.

- I attend most of the time
- Frequent timing conflicts.
- I didn't know about it
- I love St. George. I visit in spring but skip the CLE and get my CLE elsewhere. Most of it isn't relevant to me and it's expensive.
- I attend, but the classes are limited
- I have been dealing with personal issues for a few years and those have had to take priority.

- Conflict with schedule
- I spend all day with lawyers, spending several days with them is...dreadful
- I try to attend this one, but if I don't, it is because I have a time conflict or already have all the CLE credits I need for the particular reporting period.
- I do attend, basically every year that my litigation schedule permits. Do wish more younger attorneys attended, though.

- I try to attend other events
- little of relevance to in-house counsel
- I attend
- Don't want to hangout with lawyers
- I do attend
- Too hard to find hotel rooms
- Activities seem to be skewed to a certain bar segment.

Question 66: Share any suggestions for changes or improvements to the Summer Convention, Spring Convention or Fall Forum? Please select all that apply.

- Hold near Salt Lake (for instance more likely to attend Summer Bar Convention in Park City than Sun Valley)
- cannot provide relevant input to this question
- Provide more CLEs in Southern Utah, not just conventions
- Prefer summer convention to be out-of-town to combine with vacation with family
- not in July
- The presenters at 2019 Summer convention were terribly boring. It felt like a huge waste of time.
- N/a
- Too closely associated with attorneys from big firms. little interest for that, among other, reasons.
- Have attended Summer Convention in the past and was impressed with the quality of CLE and loved the Sun Valley location. However, my office would be unlikely to pay for me to attend so attending in the future is unlikely. As a government lawyer I felt a bit out of place -- the CLE was not as relevant to my practice area and there were virtually no other government lawyers in attendance.
- No suggestions.
- no suggestions

- Can't comment
- none
- Make more events available on weekends
- n/a--never been
- Consider web-based participation formats for a specific CLE for members unable to travel.
- Not interested
- When I was working full-time and attended the Summer Convention annually, I thought it was well run, great for networking and obtaining CLE credits.
- summer convention should be nice - san diego.
- Actually like some of the out of state locations (i.e. San Diego)
- we prefer to travel/make it a family vacation event
- Go back to Sun Valley!
- Make it available online. Catch up to the 21st Century!
- can we attend just a few sessions for a cheaper price?
- Summer alcohol speaker was awful, he seemed drunk
- A la carte
- Education Law
- reduce price for solo practitioners
- Specific PI Courses

- Spring and Fall are in-state, so keep Summer out of State!!!!
- Because I have only attended the Spring Conference once, and no others, I have no suggestions.
- Cant go
- no opinion
- Move IP Summit to coincide with Summer or Spring Convention
- xxx
- Vary locations (i.e. Southern & Northern California, Oregon, Montana, Utah National Parks, etc.)
- I work out of state so I have no suggestions
- Return to Sun Valley
- Your staff always blows me away with the quality you give us!!
- Never attended, no opinion
- NA
- Return to the earlier July date for the Summer convention.
- make less overwhelmingly extroverted
- Don't attend - no comment
- I like having it in or close to Salt Lake City so I can go and still keep my practice and my life on track

- Na
- Since I haven't attended I can't comment
- I have not attended
- I actually prefer out-of-state locations and am more inclined to participate that way
- N/A
- no input at this time
- Hold all events in St. George or Vegas, nobody wants to stay in SLC or go to Idaho!
- Sun Valley every year would be great
- Change dates
- Have topics relevant to prosecutors and criminal defense attorneys
- Have a government/non-profit rate. Our employers don't pay for it so it comes out of pocket.
- hold it in Salt Lake City
- Love Sun Valley
- summer back to sun valley
- Don't know
- I do not have the time to attend more than one convention per year
- My family loves going to Sun Valley.
- Have an all a cart option - if I don't have time for both days, let me just pay for one, for example
- no opinion
- More inclusive
- I have never attended, so I have no input.
- vary dates
- n/a
- n/a
- The topics usually look interesting, but my office provides a CLE program targeted to my practice that covers all my CLE hours. I cannot justify asking my office to pay for that much additional CLE credit just because the topics are interesting, and I cannot justify footing the bill myself on a government salary.
- Keep Summer in Sun Valley!!!! There are enough other CLE and events that aren't 'expensive' for those who won't pay for Sun

Valley. Don't ruin that one event for those of us who like it.

- No suggestions
- Significant Discount for non-profit attorneys
- I am more likely to go if my colleagues and friends are going
- Can't really think of any changes that would make me want to attend.
- I just wish it was closer as in surrounding states: Idaho, Wyoming, Colorado, Arizona, Nevada
- More content for non-litigators.
- Bet less liberal presenters, especially as to lawyers helping lawyers professionalism courses
- Need more content relevant to corporate/securities
- Better locations for the Summer Convention. The other two conventions are located in Utah, that's enough
- Brand new attorney and haven't been
- I need very specific CLE's for general counsel. I rarely find relevant CLE's to my position as GC.
- government lawyer track, more criminal substantive cle
- didn't like Park City. Prefer to get away (Sun Valley)
- Credit for non-Utah bars
- make it little guy and govt lawyer friendly
- Better options for small firms. The content isn't always the best which may be the result of the volunteer planning committees. Sun Valley! :)
- Not attended
- More CLE courses. 12-15 credits.
- Back to Sun Valley. There is plenty of cle in state. Some outside is great.
- NA
- Need more and higher quality speakers. Consider increasing the Bar's commitment per speaker. You sort of get what you pay for here. Seems the last several Conventions had mediocre speakers with a focus or specialization

for a small sector of the Bar membership.

- Minimize Lawyers celebrating lawyers
- Unknown
- I don't have any
- More transactional/securities-related courses would be great.
- Not interested. I like the CLE that I attend that are better suited for my area of law.
- I cannot comment as I have never attended.
- SUN VALLEY
- Hold it in Sun Valley. For me, this is the perfect location. Far enough away that my clients do not expect me to continue doing their work while I am there, but close enough that I can drive to it. Plus, my family loves Sun Valley. Park City is too close. San Diego is too far away.
- i don't attend
- Never been
- Add a few more hours so we can get at least 12 hours in the 2 days
- I am a prosecutor so I attend Spring and Fall Prosecutor's trainings
- Return to Sun Valley
- For multi-day events, provide a pass for one day only rather than requiring the purchase of the pass for the entire convention.
- I do not attend - no suggestions.
- Go back to Sun Valley
- No opinion as I cannot attend
- n/a
- Didn't attend
- These don't apply to my work.
- If you held it on a weekend within driving distance of Salt Lake with a scholarship I could dream of joining your exclusive party for people in a high-income private firm club that I'm not a part of.

- I don't have enough time or CLE budget to attend all the Utah Bar conferences
- they have to be at least revenue neutral; the fact that my bar dues subsidize the conventions is absurd
- N/A
- As is for Summer Convention means, keep in Sun Valley.
- I attend IP Summit. These other conventions/forums are not nearly as applicable to my practice.
- none
- add more Ethics
- Have it in Sun Valley again
- unable to respond
- make so two conventions per reporting period finish hours
- Do in Sun Valley
- Tries to cover all practices, I go to specialized CLE.
- Allow remote access; CLEs can still count
- Sun Valley is always great. Other locations are less attractive.
- I don't feel like I get an opinion since I have no interest in attending one of these.
- Allow people from out of state to attend via Web cast
- Sun Valley. Always.
- No opinion
- I know it's a losing battle, but I like Sun Valley better than any other venue.
- Summer Convention should be held within the State of Utah
- As I said earlier, I have no interest in attending the Summer Convention when it is held in Park City. I have attended the convention nearly each year when it is in Sun Valley or Aspen or San Diego.
- haven't attended
- It's more about leaving my family for a weekend and cost or desire to bring them

- Content relevant to my practice. Often the bulk of choices is NOT relevant and one hour of CLE is not worth the time and money to go to the conventions
- make it free or discounted for nonprofit attorneys
- I decide to attend based upon getting family to come along, children and grandchildren.
- Sun Valley is the best.
- I don't know because I won't go.
- Offer prosecutor specific topics.
- Vary the times held, especially with the Spring Convention so it does not conflict with the end of the legislative session.
- I have attended when they have been in Salt Lake City. Location is most important to me.
- Friday option only
- never attended any of these--sorry
- I hate CLEs period. I find them an unnecessary expense and a waste of time.
- Better scheduling on my part
- I don't have any suggestions, because I have never attended.
- More diverse range of speakers.
- closer
- n/a
- non resident
- Reduce the per hour cost of CLE;
- I've never been so I'm not qualified to answer this one.
- allow option to pay a la carte
- Not Applicable
- get rid of the Diversity and Inclusion garbage. It is ridiculous nonsense for anyone with a brain.
- Go back to sun valley
- NA
- I have never been stationed (I am a military attorney) in Utah and will not attend unless I am.
- reduced cost for non-profit
- Allow CLE credits to carry over to next year so you are not wasting money by attending the entire convention

- Doesn't matter, no interest
- Return to out of state rotation
- N/A
- There needs to be more practical CLE's. I am also licensed in Texas and the CLE's there are practical and worth 15+credits for two-day events. Here, the most you can get is 10 credits for an unreasonable price. I wish it was more affordable and better quality CLE's. We need more things that touch on governmental immunity (how to sue municipalities), contract disputes, case overviews from the Supreme Court and Court of Appeals, etc.
- do not support other states ski resorts.
- do not attend -- not applicable
- I would attend if my employer paid for it.
- I get my most useful CLE from the Utah Association for Justice and from national organizations like AATA.
- Take convention back to Sun Valley-plenty of conventions in Utah
- Reduced or waived fees for government and non-profit attorneys
- No opinion
Don't target it to older, white men in law firms. Skeet shooting and golf as social activities? C'mon
- the Bar Offers little for older lawyers like me
- stop holding Utah bar events outside of Utah
- I have E nothing to say.
- no opinion
- Better locations out of state.
- AG employer has no CLE budget and topics are not relevant to my work. So unless it was free and I had a coincident lull in workload I would be unlikely to attend.
- NA
- Keep the convention in Sun Valley
- I have no suggested changes

- Closer to SLC or park City is best
- No opinion
- vary locations out of state
- Move back to Sun Valley. The Colorado and PC locations suck. Sun Valley is magical.
- none
- Allow for online, live participation for CLE credit
- Scholarships for nonprofit/government attorneys
- GO BACK TO SUN VALLEY
- Invite me to present on Crimmigration
- Need more appellate specific content
- Involved in specialized federal practice
- Not really interested in multi-day events
- More programs (any programs) with intellectual content or reflection on nature of law and legal practice
- Extraordinarily pleased with the CLE's
- Have a destination convention so attorneys can get CLE, have a meaningful get away, and enjoy the company of other attorneys and their families.
- N/A
- vary Spring convention time to match school vacation week
- I can't suggest any because I rarely attend because my CLE has been through the Department of Justice, which won't pay for me to attend the bar conventions.
- vary locations out of state
- Sun Valley!!!
- Never been so can't offer suggestions
- Less defense oriented
- None, I've never gone
- No opinion
- None
- NA
- What happened to free CLE?
- None
- I am not sure, but specific topics in my field are not my answer. All events have great speakers and topics, just not general enough to be

applicable to all of us. So, cost/benefit is always an issue, where dollars and hours are part of the cost.

- Make self-study more acceptable. Make it sufficiently rigorous, but the idea that the only way to learn and stay current is to sit through a 3 hour seminar and then golf or ski is fatuous.
- By the time I attended both fall and spring convention, I would not need to go to the summer convention because that would be too much credits for one year.
- Would like to see local options where I can return home with my kids and then come back the next day.
- No park city
- None
- I didn't graduate from a local law school and so there isn't any draw to see other lawyers. The courses are also way to general for my needs.
- Don't care
- Make the employers think it is necessary
- Return to Sun Valley
- I haven't attended for years.
- Spending it with non-lawyers?
- Add a track for someone other than the firms that pay for advertising
- No input
- don't know
- Have at least one of them in Hawaii (not Mexico - don't go cheap)
- I need more hours in a day.
- I miss Sun Valley
- address needs of in-house counsel
- I doubt I would attend regardless of any changes.
- n/a
- I live too far away to attend.
- Go out of state. California was great.
- I attend other CLE events throughout the year related to my practice / industry - so it is unlikely I will ever attend the Conventions

- Hard to justify to my company as in-house counsel the expense and time away from the office, it would need to have a track that's extremely relevant to in-house counsel practice.
- personal reasons prevent attendance
- Cover a broader set of practices, like IP
- Price for one day attendance
- Not applicable
- Make the activities attractive to other than the wine and cheese crowd
- Go back to Sun Valley

Question 68: What are the primary reasons you have visited or used the Utah Law and Justice Center in the past year? Please select all that apply.

- random reasons
- Seldom there.
- New Lawyer functions
- Pay dues
- Bar Exam Grading
- Mock Trial Program
- grade bar exams
- Expungement Day
- UAJ meetings
- Prepare a RiCO and conspiracy to defraud suit for client
- To provide professional services.
- other meetings
- Grade the bar, UDR
- grading bar exams
- clothing drive drop off
- Letters of Good Standing
- Grading bar exams.
- Pay annual registration fees
- Mediations
- Mediations
- Grade bar exam
- Bar
- Information on other lawyers; renew membership
- I think i attended a CLE there
- tuesday night bar
- Tuesday Night Bar, YLD mentoring
- Meetings with UAJ
- bar exam grading
- Grading Bar Exams
- Drop off paperwork
- Bar Exam grading
- cle
- Deliver CLE compliance
- To pay a fee
- errands - pay dues
- Mediation training
- Needed a document
- Mediation
- NLTP meeting
- Interview
- Grading bar exams.
- mediation at UDR
- get a replacement bar card
- Mediation with UDR
- license information/registration/due pymnts;
- Attended an arbitration proceeding.
- Meetings relating to the Utah Association for Justice
- Utah Dispute Resolution
- UAJ Meetings or CLE
- Pick up Bar Card
- bar exam grading
- Mediation with UDR
- Mediations
- Fund for Client Protection hearings
- none
- US Magistrate Selection Committee meetings
- Meetings with Bar leadership.
- Pay bar dues
- Meetings of organizations that use the Center
- Grade bar exams
- na
- Bar functions
- Other meetings
- UDR
- n/a
- To grade bar exams.
- Visit friends
- work space when have court or mediation in SLC
- mediation
- Board member
- Get new bar card.
- UDR

Question 69: What are the primary reasons you have not visited or used the Utah Law and Justice Center in the past year? Please select all that apply.

- I never heard of it before this survey.
- Practice in northern Utah so hard to attend midday or after work events
- Disability made it difficult to do much beyond go to work at review center and go home.
- I don't know a lot about what it does or offers
- I do attend. I didn't realize that was the name.
- Others do research
- Retired
- Haven't had any reason to visit
- It's location is great if you work in downtown SLC. For everyone else, it's location is not convenient.
- I have no reason to visit.
- I had no business needs there
- Moved out of state
- working towards retirement so not necessary
- n/a
- I have been in practice less than a year
- What is the Utah Law and Justice Center? Had to google it to see it's just the Bar association's building in SLC)
- No reason to attend.
- I have no business there
- what is it??
- I have gone a few times for CLEs
- I don't have any reason to visit there.
- Have never even heard of the Utah Law and Justice Center. I have no idea what it is.
- No time to attend activities events
- Didn't think about it
- I want little or nothing to do with you.
- not aware of it
- I don't know what this is. Are you talking about the Bar office in SLC?
- I was on inactive status last year. In past years I attend CLEs there
- I live in St. George
- I don't even know what it is
- New attorney
- Didn't know anything about it
- I don't know about it
- I do for free CLEs
- no reason to.....
- Never heard of it
- Don't know what it is.
- I live and work in St George; SLC is not remotely convenient for me. Ever.
- never heard of it
- I didn't know it was something you could visit or use
- No need
- Do not know what it is
- ?
- No need
- Is this the bar headquarters? if so, I don't have a reason to visit.
- Parking is inconvenient
- Too far away
- Haven't visited
- Military stationed in Virginia
- Don't want to see other lawyers.
- I can't drive 2 hrs round trip and justify a one hour CLE.
- No knowledge of usefulness to my practice
- I work and live in St. George
- I think the state bar is a gigantic waste of money and resources.
- not interested. no time

Question 70: Please provide any other comments about how the Utah Law and Justice Center could better serve your needs.

- Better parking
- More pro bono training in differing practice areas, like family and criminal law.
- I am satisfied with the Utah Law and Justice Center the way that it is.
- I fell like a spend a lot of money but don't get much in return
- About 10 years ago, I know there were discussions about improving the building, providing better parking, and or selling the building and finding a new location. It is time to revisit those discussions. The building is too small to hold multiple CLE events on a single day or a large event on a single day. The parking is too limited. We have grown significantly in numbers as a Bar. It is time to rethink other options for the building.
- None
- Parking availability is poor on some days.
- More comfortable chairs and more of them, especially when there are CLEs that are well attended. Faster internet to use when needed, again, especially at CLEs that are well attended. Vegan menu at all CLEs and all USB events, and a more expanded Vegan Menu.
- More continuing education available on-line.
- None
- Many of the 1-hr CLEs in SLC are relevant to my practice and I would love to attend. However, I rarely attend because it is a 2-hr round trip drive for 1 hr of CLE. It would be great if you offered 1-hr. CLEs in Utah County.
- More CLE courses
- Open one in Provo/Orem
- We need better use of technology to allow more participation by those of us outside of the greater Salt Lake area - like GoToMeeting capability, or other interactive possibilities.
- Conduct some CLEs in Utah Valley (BYU Law School?)
- none
- Meets my needs.
- provides great location and service.
- If possible reduce the costs to use the facilities.
- Sell it.
- None
- None
- None.
- None
- More CLE events at numerous times and locations would be very helpful.
- I have wondered, given the current levels of polarization in our political and civil societies, whether we have an obligation as a profession to try and address this phenomenon and work to repair the total breakdown in communication that currently characterizes our Congress and Senate. Shakespeare says, in one of his plays, "kill all the lawyers" but in fact, lawyers as a profession are in a unique position to work on issues of social justice, civil rights, and a robust rule of law, like no other group of professionals. I have always been impressed with the Utah Bar as an organization, based on its attention to pertinent Have a Utah County Branch
- Lobby effectively
- Update lobbying efforts
- Bar Commissioner change more frequently.
- More services for retiring or part time retired attys.
- More public awareness campaigns
- Mediator ads should indicate they are or are not court rostered.
- Make it easier to practice pro hoc vice in neighboring states.
- Na
- No complaints. Great resource.
- Difficult since I work so far away. Transferring available resources from in-person to online may increase usefulness for me.
- There are a number of CLE programs through the year that are interesting, but I cannot justify the cost of travel to Utah. Making them available online would be very helpful.
- I would breach an ethical obligation to a client if I responded.
- 1. Enforce ethical and professional conduct rules in family court with Commissioners. It is like a wild west rodeo! If Commissioners' intent is to make coming to court so unpleasant, is not that contrary to the "access to court" goal of the Utah Supreme Court?
- 2. Address stress.
- none I live out of state
- It would be nice to have more access to live bodies by phone. Usually when I call in I get a voicemail and if I do reach the receptionist, the next person she transfers me to I get a voicemail.
- I have nothing to add.
- I am satisfied with my care.
- It needs more parking. I was unable to attend a CLE because there was no parking available. Please plan CLE/meetings to allow for parking or suggest another parking area close by.

- I like the way it is run. Head of CLE is very professional
- ULJC is past its useful life. Find or build a new and bigger building, to both better represent the practice and to better address the section needs for holding meetings and CLE.
- Do away with the answering machine, or have a number that only bar members can access to actually reach a live, real person. It is a universal complaint amongst attorneys that you can NEVER get ahold of someone at the Bar. Bar staff are there to serve attorneys. Someone needs to answer the phone!
- None
- Many of the events are geared towards attorneys in the SLC area. I reside and work in northern Utah. If I were to attend a lunch CLE at the Bar, I would lose a half day of work time for travel. Offering CLE opportunities in areas outside of SLC would be helpful.
- Would be great for committee/practice area-specific CLEs (real property, trust and estates) to be held at locations around the state, not just Salt Lake. I've considered flying up from St. George for the day simply to attend one of the CLE lunches at the Alta Club, but it becomes cost prohibitive. Would be great to host similar lunch CLEs at rotating spots around the state.
- Don't know. It seems to only serve attorneys in Salt Lake. It is inconvenient to get there. The CLEs held there are at inconvenient times.
- They are doing a fine job.
- They are doing a great job, keep up the professionalism and friendliness
- Updated technical capabilities.
- Very satisfied with services.
- You are doing a great job.
- Lobby for more affordable healthcare options for small business owners.

- None
- Provide the slide decks for CLE.
- I am very, VERY proud to be a member of the Utah Bar. Year after year I am grateful and astonished at the kindness and quality of the staff I encounter. Thank you for continually professionally blessing my life!
- Don't bother
- NA
- Not everyone lives near the Wasatch Front
- Accepted CLE needs to be more flexible. Especially the live CLE requirement. Dude me to send live events I need to drive three hours and spend the night somewhere.
- Provide services for smaller firms.
- Nothing
- I have practiced for 55 years. I love the Law and Justice Center, the Bar in General and have very much appreciated the opportunity to be a lawyer. I used to have several assignments every year, but have none now so I don't have the same reasons for coming to the Law and Justice Center
- Na
- I have no knowledge of how I can use it other than to attend CLE. Maybe more outreach about how it can be used by attorneys would be helpful.
- Change CLE to annual compliance and give more credit for classes taught at law schools as adjuncts each semester. Also, more credit given for teaching Ethics in law classes. Have a Human Rights Law committee and a section listed of the Utah Bar website. The state bar needs to amend the Code of Ethics to include the "Ruggie Principles" for all practicing attorneys in their global practices.
- I'm winding down my practice and am almost completely retired, so I don't have much of a need to rely upon the Law and Justice Center.

- None
- No further comments.
- It sounds like there are a lot of resources available that are unknown to me.
- Better (more) parking
- Great the way it is!
- None
- None
- Yes, when the Office of Professional Conduct sends out notices or letter about CLE--change return address to include CLE within the return address caption--
- more parking
- None
- I don't even remember it exists
- cover more administrative (workers compensation) matters
- The noon events look great for those in the SLC area. I have "attended" by phone when available. Maybe more remote attendance options?
- No comments. I would probably use the center if I lived in the Salt Lake area.
- Establish a senior bar section in St George It's fine
- Not applicable
- Nothing comes to mind
- I'm not sure
- ?
- I'm not sure what the building is used for.
- I'm not really sure what this means. I just didn't attend any events there, but otherwise, I think it works just fine.
- Regular meetings/get together a for other plaintiff bar/PI lawyers.
- Better description at Utah Bar site explaining available services.

- Paralegal practitioner program doesn't make any sense. If the standard for the practice of law has been set, people should be expected to come up to that standard, not lower the standard so that more people are practicing law. There is a glut of practitioners as it is.
- I would love to see more rules of conduct addressing combative lawyers. I'm seeing too often cases becoming a game in the eyes of opposing counsel where its more about a competition with opposing counsel than representing the interests of clients in a legal dispute. Attorney's should always be working together, even in adversarial relationships.
- I am pretty proud of the extent to which our Bar tries to remain relevant and useful to all its members and again express my thanks for all the services offered. I have recently wondered whether, in the current climate of polarization, and overt attacks on our various civil institutions, including the independence of our judiciary, whether it behooves us, as a profession, to address these issues collectively--through CLE, action committees, and the like. I would like to see this question actively debated and considered among our membership, with an eye to at least considering whether we ought to take some kind of I enjoy the CLEs I have attended there and will continue to attend them. Not sure what else the Justice Center could provide for me and my practice.
- Parking is often a problem.
- none
- better parking for major events
- It has exceeded its useful life. Buy a new and bigger building.
- More PARKING!
- There needs to be better access, through use of technology, to the lunchtime CLEs for those of us outside the greater Salt Lake area.
- NA
- Add more parking
- I often hear about great CLE opportunities in SLC, but can't take that much time off to go, especially if they're at lunch-time... It would be great if more of these (especially those with Judges) could be attended (even not for credit) through zoom or webcast.
- The Bar needs to try some new approaches to providing information, member services and CLE. Not much has changed in the last forty years.
- It's nice. I look forward to more opportunities there.
- The Center is just fine.
- No comments
- Excellent facility. always a pleasure to be there.
- Needs to be worth the drive to Salt Lake.
- I think they are doing well.
- Free CLE
- None
- It doesn't help me at all.
- cut down on plastic use, replace water fountains so a bottle can be filled.
- I really want good CLE's that are relevant to GC work
- I've looked into hosting CLE events there in the evening, and it just isn't accessible to bar committees/groups especially in evening hours.
- Have more CLE's that are not just at the Law and Justice Center - vary the CLE locations, and not just the convention locations. For those who live outside the wasatch front it is too far away to attend the "regular" CLE classes.
- I wish that when we participate in a live CLE from a remote location with Zoom Video that we would get Live credit.
- The wifi and tech needs updating.
- I avoid CLE at the Center because the parking sucks.
- Have more of the lunch/short CLE courses outside of SLC. Utah County would be good.
- Nice looking building. Some staff are helpful... others are really not. Customer service could improve.
- Accept payment for MCLE by cash, check and/or credit card.
- Could do a better job of soliciting a wider diversity of programs for a lower cost.
- What about creating a coworking space for attorneys at the bar? Skills labs? Teach attorneys business skills and communication skills. Attorneys suffer mentally long before they have a break down or find themselves violating the rules - can you create (probably a nonprofit idea) a team to temporarily assist an attorney with his or her workload/business organization as a means of preventing issues.
- The Bar Association is focused on the Salt Lake City area and doesn't sufficiently serve the interests of lawyers in remote areas.
- None
- I would like to see the Bar represent the interests of attorneys more. Also, I think the recent non-bundling of legal services is not a good idea.
- The building is looking tired. The Commission should spend some money to replace old, worn furniture and soiled carpet.
- i have no suggestions
- I actually never thought of meeting a client there but that would be a great idea.
- Love the change of venue to the Mtns. in Park City!
- Sun Valley and other out of state places were always too expensive! Now you can really get some big names in for key note speakers with a broad appeal to the general Bar membership.

- Real Support for attorneys not just lip service. Hanging an attorney out to dry for the sake of protecting the public is such a shame, so harmful to the morale of the Bar. Especially when, as my observation has shown, the public will take an attorney to the Bar - just to avoid paying fees that are rightfully earned. I have so many colleagues who are disenchanted with the Bar and the practice of law who have left, who are leaving or who are contemplating leaving the practice of law entirely.
- none
- It is fine the way it is.
- I believe the Bar should have been on top of the UTSC's review of the practice of law and informed us as bar members of what the UTSC was doing. The appearance to me is that the Utah Bar has done little to nothing to inform us as bar members what the UTSC was up to and what we might be able to do influence the process. It seems that the train has left the station and we as bar members are left with few options. For the UT Bar not to be out in front of the UTSC opening up the practice of law to non lawyers is what I would define as falling asleep at the wheel.
- needs more parking
- There are a lot of lawyers that do not live and work in Salt Lake. It would be nice to be acknowledged that other attorneys work and would like services that are not tied to the Salt Lake area.
- N/A
- No real needed changes
- I think it is overall doing a good job
- Not sure
- When large events like the new lawyer training program are scheduled, do not schedule other events at the building because parking is limited and impossible for other events when larger functions are going on.
- more parking
- Consider reducing bar due for sole practitioners and government attorneys who are not reimbursed for their dues.
- None
- not sure
- General recognition of corporate practices--look at this survey: questions about going to court, but nothing about what a transactional lawyer does.
- Nothing further, thanks.
- N/A
- great work
- None, it's a well laid out and run facility.
- Quit billing me for the costs of running your little palace.
- CLE events need to cost less
- Parking available increased
- Address parking problems that arise when multiple events held at LJC.
- No comment
- Better parking
- More parking
- What is it?
- None, you do a great job
- Don't Know
- Both the Bar License Fee and the CLE requirements should be substantially reduced for retired lawyers who primarily do pro bono work.
- Perhaps more communication about benefits the Bar provides to its members such as health insurance options, investment options, etc. I expect this is mostly my fault for not going out and searching our website. But, may be short regular seminars on what benefit programs we are involved in and how to make best use of the same. Overall, we are doing a very good job for our members. I worry about the future changes in the rules. i am concerned we are not seeing the abuse that is very difficult to regulate/correct through disciplinary procedures. The rules have acted as a damn to keep practitioners within certain I have nothing to say
- None
- None.
- FREE CLE
- Wish there was more parking.
- Again, I'm unaware of what the Utah Law and Justice Center does. (I'll google it when I'm done)
- Reduce staff and overhead to reduce legal fees. I'm a member of 4 bars and Utah is two or three times more expensive.
- Reduce licensing and CLE fees in general for lawyers who are not well compensated. I work in an office (over 30 lawyers) where we are all required to hold a bar license, but most of us make less than \$50,000 per year.
- None
- Better technology so all CLEs can be live streamed. I cannot make it to SLC often and feel I miss out.
- Reduce CLE requirements for retired lawyers
- I have never been and don't know anything about it; but I plan to look it up after the survey.
- Not sure
- well done
- Make CL E less expensive I feel that it is generally a waste of time and we do it because the CLE providers lobbied get CLE required. It is usually irrelevant to my practice but I must do it to meet the requirement. It is really a great waste of time. It should be reduced and we could then focus on learning something more relevant to my practice. I find myself looking for the cheapest CLE because it is almost all irrelevant. Although sometimes interesting, but that is not enough to justify the time and expense.
- NA

- I don't need it
- provide free CLEs
- Offer better online courses. They are in need of DRASTIC improvement.
- NA
- More low-cost cle
- End the Bar Journal and CLE. Both are just money makers for the bar association and have no benefit for practitioners.
- ok
- None.
- The trend away from attorney-based litigation has actually made law practice less effective and much more expensive. Why do judges indulge unrepresented litigants who clog up the system with vexatious and nonsensical filings? If an attorney breathes the wrong way, we get clipped. The Bar should encourage judges to get real, not tell litigants things like "if you get a lawyer he should be able to do your complaint in about twenty minutes" and other anti-lawyer "advice" like that. I feel like the Bar and the Courts are doing everything they can to drive lawyers out of the practice.
- Na
- None
- Very pleased with center. Parking is difficult at best.
- NA
- I appreciate all you do!
- Unsure without devoting substantial thought. Keep up the good work.
- Have conference rooms available for attorneys to schedule and meet in.
- Better Office of Professional Conduct.
- Meets my needs
- Reduce dues and reduce costs of CLE
- None just inconvenient to go up there
- no comment
- Please consider significantly reducing CLE requirements. I do not believe they improve the practice of law. Most attorneys I speak with (actually, virtually all attorneys I speak with) don't like them and find them a waste of time

and money. I am an AV rated attorney in Martindale Hubble. The rating came from judges, plaintiff and defense attorneys who were not necessarily my close friends. I only say that to bolster my plea to just get rid of mandatory CLEs, other than maybe for new attorneys in their first five years of practice to ensure they can obtain a certain level of competence in their area of practice. But Thank you for reading my long diatribe. I realize nothing will change. Unfortunately, we all want to be like everyone else.

- How about some satellite locations so that Wasatch Front attorneys are not the only people that can benefit. Logan, Richfield, St. George, just to name a few.
- None
It provides almost no resources applicable to prosecutors.
- na
- I think it's fine
- The Admissions Office needs to shift its focus and attitude away from being adversarial to people trying to practice law in Utah. When I joined the bar ten years ago, it felt as if the leadership of the Admissions Office was working against me trying to practice law rather than supporting me in my transition from law student to lawyer. The attitude of the office was militant and I'm sorry to say that it left negative first impression of the bar that took years to overcome. Since becoming a member of the Utah Bar, I have seen the Admissions Office consistently oppose or hinder efforts to expand the ways in which people I'm not sure what services are available to me?
- develop means to provide reasonable access to CLE sponsored events for those who cannot, or have difficulty attending a CLE event. I.e, live in Logan, and the event is in Moab or St. George.
- Should have videotaping, podcasts, etc. available
- at a reasonable cost to the Bar!
- It works for me.

- When I lived in Salt Lake it was really convenient. Now that I have a new job, I live much farther away and will not attend CLE's there. It would be nice if the CLE's had an option where we could remote in. I'm not planning on renewing my membership in the sub group I'm in after this year because I won't be able to attend any of the CLEs.
- I am so sick and tired of how the Bar and the Utah Supreme Court have come to embrace and pursue "political correctness" with a vengeance, specifically, all this Diversity and Inclusion garbage. We need to honor Dr. Martin Luther King and judge and promote people on the basis of their character and work ethic, not the damn color of their skin. Talk about judging a book by its cover! The proposed rule a few years ago prohibiting lawyers from being able to say anything disparaging about the judiciary was truly Orwellian and Marxist. Then, more recently, the rule about letting judges get involved in politics and Great facility. Just don't use it.
- Don't know.
- Honestly, I'm not sure--I'm still a fairly new attorney and I feel like I get a lot of the support I need from within my office and colleagues, so I haven't spent much time exploring ULJC's resources. I think that the sort of things I've heard ULJC provides sound really cool, I just haven't felt the need to use them myself yet.
- na
- I don't really have a need for center. I recognize it's value, but I almost never physically go there.
- Provide short-term office space rentals at very good prices for members
- More events there!
- reach out to rural locations
- I support any change that results in lower bar fees for gvmt attorneys
- Pay more attention to expenses.
- What is the Utah Law and Justice Center?

- IF it scheduled more CLE's on Fridays. I do not practiced in the Wasatch front and nearly all of the CLE's at the bar are in the middle of the week. With a mid week CLE it makes it more difficult to attend these CLEs. Also make attending a live presentation over the internet a live credit. It is not like attendee in a live event are actually paying more attention to the speaker then some one who is sitting in there office. When you walk behind the attendees you can see they are doing work or reading a book.
- The Mentor Training Program needs to be done away with, to be honest. If not, then it should only be for people in law firms or private practice. Otherwise, those in clerkships should be able to count their clerkship and those in firms that are assigned mentors should be able to opt-out. Carrie Boren is a major jerk. I was not impressed with the way she handled herself in communications with me and at mentoring events. She is rude and defensive.
- Fortunately, my mentor was great and I loved getting to know her, but it was a lot of extra time for things that I had already learned at the Court and in my previous job.
- Again, the CLE's could be more practical. I work in a law firm that does mostly civil. It would be helpful if there were CLE's specific to preparing settlement agreements, governmental immunity (when suing municipalities), property disputes, easements, etc. It would be nice to see things more practical instead of academic.
- Overall, I appreciate the Bar and the opportunities it gives to meet with people and get to know people. I just wish some minor changes would happen.
- The Utah Bar provides no value to me as an attorney or to protecting the public. Let's stop putting on a show, show some real national leadership, and get rid of the Bar.

- I don't know what services are available at the center. I suppose that would be helpful to know.
- Better parking. I know when I go to a CLE there, I'll likely have to park on the street. There's never enough parking.
- Can't think of anything. Since may be addressed in another part of the survey, but it would be nice if you actually gave counsel when we call in for ethics advice. As it currently is, the person just calls us back and directs us to a section in the rules of professionalism, and that's it.
- I would use it sometimes for depositions.
- I think it is a good location for CLE.
- None
- I have no idea what the Bar Commission is doing. Bar Admissions does not work well to help new admittees. People dislike the Bar from day one and that's a big mistake. The Admissions process needs to be improved.
- State-specific desk books or other legal treatises
- Sell it and get a smaller building to reduce our bar dues. CLE's were only instituted to raise funds for the Law and Justice Center in the 1980's. The lawyers of Utah were promised that CLE's would no longer be required after the construction costs were paid. This did not happen and now we have unnecessary extra space and unnecessary CLE trainings. Every lawyer I know studies the law for a significant portion of their time in practice. Why then take a generally irrelevant and overpriced CLE as well? Thus, we don't need as much space and could save bar dues by reducing the size of the building.
- Make health, professional liability insurance available. Better more practical benefits to lawyers.
- It is getting dated and may need renovations soon.
- Keep the profession honorable. Don't lower standards and accommodate everyone at the

detriment of good high quality capable legal representation.

- Never let go of John and Richard.
- Better CLE's
- I only use it for CLE. I don't see much additional value to having that center.
- N/A
- It is convenient for those close to Salt Lake, otherwise, it is not beneficial to frequent the Center
- Stop using my bar dues to promote paralegals who will then compete directly with my firm for legal services.
- N/A
- Invest in a parking garage
- More parking spaces
- None.
- Make it about \$400 cheaper to maintain a bar membership. I am barred in this and another state and the price difference is extraordinary. Utah's bar is extremely expensive and there's no discernible difference in what that cost provides beyond a cushy building downtown for the Bar's employees and fancy galas masquerading as conventions that are targeted to a small, aging-out population of lawyers.
- Lower the bar dues. But I know that will never happen, and in fact I am certain you have been in discussion for years on when the most palatable time will be to increase them.
- Could promote multi party mediations space
- Not much relevant information and events for in-house counsel.
- I believe the Utah State Bar does little of practical benefit for practicing lawyers. it is the worst union in the United States of America It does more to make practice difficult for real lawyers and is concerned primarily with public relations.
- It is detached from my world in Logan

- n/a
- No comments
- None
- Better recognition that transactional and in-house counsel have vastly different needs and desires than most litigators. I need to be learning about market conditions, current import and export challenges, and lots of other very industry- and market-specific issues to best serve my client. Forcing me to put the Bar and the Law and Justice Center in a prominent position does not serve the best interests of my clients.
- CLE in Utah County. Find a way to reduce bar fees. They are very high for the services we receive.
- Na
- No Complaints. It would be nice to have CLEs for Plaintiff related work that would offer 15 -20 credits in one seminar over a two or three day period.
- Online access of some sort would be much more helpful. Perhaps, an online hotline chat would be helpful (maybe there already is one? I don't know).
- Not sure
- I live and practice outside Utah, so no changes would make any difference.
- it is difficult to get a phone call answered, when asking for guidance on a subject
- I went in there 20-something years ago to take the bar exam and have never been back. I don't even know what goes on inside.
- (1) Provide a good relevant electronic forms library in MS Word format (2) more aggressively promote the interests of lawyers, comparable to how the medical profession promotes doctors
- Close it and reduce my ridiculous annual fees.
- Maintain the excellent "customer service" operators to answer questions. Happy, pleasant communications encourage continued contacts.
- I would opt for electronic version of the bar journal but don't trust it would really reduce bar dues.
- Don't send so many CLE updates near the end of a cycle when it's not the end of my cycle. Please stop sending so many court updates and rule updates - we are not all litigators - it makes me disregard most bar communications because it feels like you don't know your audience.
- Do a good job overall.
- Maybe send an email telling lawyers how many hours of CLE they are deficient in which categories by which date.
- Move the Bar conference back to Sun Valley
- More opportunities to mentor on a one-time basis.
- I think it is doing a good job for lawyers n general
- None
- Are there meeting rooms where I could meet clients? I never knew this.
- I am impressed with the Utah Law and Justice Center.
- The administrative staff are fantastic. Each person that I have interacted with tried to genuinely (and courteously) assist me.
- NA
- Decrease Bar Dues.
- Make classes available to lawyers in St. George.
- Out of state services
- Offer to assist lawyers by having a law student pool of students who would like to work with lawyers on cases.
- Focus on in house practice and services. It just isn't relevant to what I do and the CLE offered by the Bar is expensive for the content.
- New carpet!
- More accessible, hard to reach anyone in person or by phone.
- Not sure how.
- I have felt for many years that the Bar is an old boys and girls network. I don't see the governing body as very inclusive. The representatives seem elitist and their experiences are not very relevant to the life of an average practitioner.
- I also deeply resent the inclusion of paralegals as Bar members. They are not licensed, certified, subject to professional discipline nor maintain malpractice insurance. I spent 7 years in higher education, sat for a three day Bar examination, am required to complete continuing education and pay dues. A para-professional should not be afforded the privilege of Bar membership. There is no reason the paralegals cannot have their own, distinct association.
- Make more CLEs available remotely.
- Great Place. Food needs improvement.
- How about reviewing the CLE rules in light of today's technology concerning live hours
- Don't let paralegals practice law!! Almost 1/3 of my salary (\$50k before taxes and student loans) goes to paying loans for law school. And Utah is saturated with lawyers, several doing Doc Review for \$23 per hour. It is insulting and unfair paralegals can practice without paying for law school.
- More on line and less expensive CLE. More ethics credits in CLE offerings.
- Allow all CLEs online and report CLEs online
- Better parking when being used for multiple events, a coffee shop/stand for a decent cup of coffee or a light snack, better soundproofing between rooms separated by portable dividers, better a/v sound system.
- I appreciate the help I receive. Otherwise I have no recommendations.
- No idea
- Have better employees.
- This survey took way longer than 15 minutes

- I don't really know what services are offered there for me
- Help find solutions to collect money owed from clients who don't pay. It's frustrating to fight and win cases for clients who don't pay, and then my family suffers. I'm new to practicing law, but there seems to be a trend where clients think it's ok not to pay their attorney. I love practicing law and helping people, and would greatly appreciate help from the bar on finding solutions to the problem of not getting paid.
- Reduce the fees we pay the Bar.
- N/a
- Currently outside of Utah.
- na
- Real people answering questions in real time when you call.
- More case information
- None
- None
- Parking is limited.
- None
- None
- None
- None
- I'm not sure, but I really have little idea what it provides besides CLE meetings and committee meetings. I love the staff. They are all helpful and friendly. You have some good attorneys in the discipline group, some really great ones, but you used to have some dyed-in-the-wool, government-style bureaucrats some years back. Watch out for those.
- I have gone to other States (mainly Nevada and New Mexico) and witnessed first hand some of the services provided by their respective bar and I have to say Utah State Bar is extremely good at providing services to its member. Compared to others, Utah State Bar really focus on civility between lawyers which I don't see in New

Mexico. Furthermore, it seems members always attend the CLE classes compared to Nevada State Bar. I do think Utah State bar is doing an awesome job, but if possible, can they lower the bar dues? For people who provided sliding scales services, the bar dues are pretty high and Bring back free CLE.

- I can't think of any meaningful way my life is better because of the Bar and/or its fees. I can't think of any meaningful way my life would be worse if the Bar and/or its fees did not exist.
- They do a good job
- I would likely attend CLE there more often if there were more room or CLE courses were not so crowded.
- Not sure
- N/A
- Update furniture and generally, otherwise great
- Nothing
- Ma
- Don't care
- Alternate having meetings in other counties! Utah County has a huge portion of the state's attorneys, but nearly all CLEs and other meetings are in SLC.
- Don't know what services it offers.
- Very little offered for government attorneys. Especially criminal prosecutors.
- None
- Better parking! I do remember that being an issue. I'd always come early just to find a parking spot.
- hold event related to my practice area.
- Have in-person CLE opportunities in more desirable locations - specifically Hawaii. Not the Caribbean and not Mexico. I'd say Tahiti would be great, but that's probably pushing it!!! Haha.
- I love the support for pro bono programs! Keep it up

- It was a waste of money to build it and that is part of the reason our bar fees are so high. It's a self-serving bureaucracy that should be shut down.
- I think it does an excellent job.
- Please go back to offering out of state CLE.
- I don't even know what the Utah Law & Justice Center is or what services it provides.
- It's great as it is; I might use it in the future to host an event, if possible
- Update facilities, parking
- None
- Smaller, less services, lower bar dues.
- None
- Provide additional services, more interesting activities, let me know what is taking place there, I don't ever really hear about what is going on there.
- I can't think of anything
- It does nothing for me
- Become more actively engaged in supporting female lawyers in entering the legal workplace and providing tools for their success such as mentoring programs and encouraging more law firms to provide flexible hours and telecommuting.

Question 71

- It makes it harder for me to get a job. I have been denied jobs as a white male because the workplace has to be more 'diverse'.
- Encouraging discrimination by emphasizing that the person is not a white male. For example when the "only female SLCPD cadet graduated was headline news on the TV" she is not the first female, but the reports made it seem that it was unheard of for women to be in law enforcement. Same in the legal when we are identifying accomplishments along with their protected class instead of just being a person.
- general sensitivity and mindfulness training; implicit bias training
- Diverse methods for engagement and participation in "firm culture"
- When I hear those terms, the meaning depends on who is using them.
- More equal justice; more creative, vibrant workplaces.
- An effort toward the value of a balanced workplace
- People needing legal service, paralegals and attorneys are "diverse". The emphasis should be on serving the full spectrum of the diverse populations, rather than an arbitrary measurement of "diversity". The value is in serving every individual, who has rights to fair and equal opportunity, not on creating a picture of "diversity" percentages or allocations. People have rights, there is no entity called "diversity" that has rights under the law and Constitution. Equal treatment and broad opportunity to individuals is our legal mandate, while "diversity" is a result. Manipulating the opportunities of individuals in order to create way overblown
- I think it often used as a cudgel. We appoint judges based on diversity but not qualification to

actually preside in court.

- True equality and acceptance
- I'm concerned that when a group of people defines itself based upon what makes them different, it has a polarizing, paradoxical effect, driving separation and exclusion
- Changing our "equal" treatment preferences to favor a new preferred group.
- Diversity means less white
- personality diversity, e.g., extrovert - introvert
- I would LOVE to see more racial and gender hires everywhere even if we have to FORCE them or REQUIRE them as a condition of bar membership, etc.
- A willingness to listen to a wide range of ideas/experiences from all relevant/affected parties/stakeholders when brainstorming or making decisions or developing policies
- This is a perpetually moving target with little fixed or consistent meaning.
- These are contested terms; obviously a fairness is expected.
- When I think of it, I also consider it in a broader scope and perceive it as desirable. I fear that many of my colleagues perceive it as politically correct and required without valuing it.
- an emphasis on factors other than performance
- I think it should be 1-4, and 6. Too often it is 5, 7, & 8.
- Reverse discrimination
- Note to the people writing this survey, there is no such thing as reverse discrimination, just discrimination. Reverse discrimination implies that there is only one type of discrimination and anything else is reverse. It make no sense and is a very insensitive term.
- Because it is a weapon for some, fat, old, white guys like me become overly cautious to the

determent of younger lawyers. I am less willing to share, or spend time with people who could use it as a weapon against me.

- economic diversity
- Depends on the source
- There are enough attorneys engaged in traditional practice. The world is changing. A few more attorneys need to be working on seriously meeting the challenges of current inadequacies and the oncoming flood of changes.
- It means that I will lose out to someone else, most of the time who has less experience, who is younger etc. because they check off a box.
- Social Programs that diminish everyone involved
- No clubs, ideally proportionately representational of some kind of region - East Coast / West Coast - or Pac-Nor / Pacific So / Rockies / Northern US / Great Lakes / New England/ Plains and Panhandle / Gulf / Appalachia
- People who are first-generation in the legal profession
- All of the above
- It should mean looking to hire people from different backgrounds, without an emphasis on race
- Regional
- Public relations pandering. How many women and minorities are on the bench? Case closed.
- Accept all your legal colleagues.
- Financial success
- Responsiveness to client requests, improvement to service
- I hear "not you"
- Evil attempt to divide people
- Really just treating others as I would like to be treated. Showing respect for differences of opinion, lifestyle, culture, etc.

- It means a different type of discrimination
- A landmine
- I think of people who never read or listened to Martin Luther King.
- nationality, language, physical appearance
- I am tired of hearing about it. I really am trying to focus on substance of what I am doing. I am the typified problem, white male, so the discussion seems to focus on why people like me are the problem. My folks were working class. I am the first to do to grad school and the second ever to graduate from college. So because I am a white male the world is slanted in my favor?!
- It means whatever I understand the speaker to mean in context, to the extent that is discernable.
- seems that the above list is conclusive
- Overlooking mediocrity for the sake of "diversity and inclusion," contrived professional "equality" based on factors other than merit, prejudice and bigotry against straight white religious people - especially men, virtue signaling, creating more division by categorizing people based on their race, gender and religion, focusing on distinctions rather than commonalities, complete intolerance of independent thought, a money-making enterprise for people fostering divisiveness by labeling it as "diversity and inclusion." I try to treat all people with dignity and kindness. But I'm sick and tired of having my face rubbed in "diversity Liberal wording for hiring under qualified individuals because of a random age, religion, or genetic characteristic.
- i disagree with the way this question and the answers are worded
- Inclusion is good; diversity can be bad, especially "forced" diversity
- terms that have been so overused for the last 3 decades that it has become weaponized term to perpetuate a victim mentality rather than

encourage self-reliance and self-esteem. If it wasn't so misused, it would have retained its original meaning to encourage people to look beyond their circle of current friends to expand who would be invited beyond just immediate friends/colleagues that you are familiar with already. Because it was so over used for matters that were not relevant, it became like "the boy who cried wolf" for our current times and has made the phrase lack meaning.

- All of the above
- Inclusion
- Not much diversity here due to the religious culture. Likely won't change unfortunately.
- Preventing/ending discrimination
- All of the above
- For the most part it is a talking point for individuals but in reality the hiring practices result in the hiring of individuals who are connected.
- What I think it means is different than how it is implemented. It should not be forced. Hire the best candidates for the job regardless of "diversity"
- anti white racism and anti male bigotry.
- More political correctness and quota crap!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!! It should be everything else.
- When I see what is called "diversity" in the practice of law, I see it as: an excuse for including people who otherwise don't justify inclusion by meaningful standards, a substitute for being fully qualified, a way to dumb down standards of competence without admitting it, discrimination and denial of freedom of choice (in sheep's clothing).
- Useless, because we are in Utah, majority of the attorneys are white and Mormon and this is due to the population. If you look at Nevada, they have a much more diverse population and their

attorneys represented that diversity. To me, to talk about diversity is useless, or empty talk and it is a waste of effort and resources. Unless the diversity of Utah population is increase, you will not see diversity in the attorney rank and file.

- All of the above
- Meetings, articles, things written on websites, but no actual change
- diverse educational and practice backgrounds
- Set up and steal from others
- Could be all of the above depending how it is put
- It means identity groups with political clout can enforce preferential treatment of group members using the force of government.
- Essential
- at this point, just annoying.
- Kumbaya
- Ideological diversity/inclusion
- Looking for non-white, non-straight, non-religious, non-male bodies to fulfill arbitrary measure

Question 75: In the past two years have you attended a CLE or other event about diversity/inclusion?

- Employer training and regular office functions.
- not specifically, but the topic has arisen in various CLE's
- I have never seen such a CLE
- New attorney
- Retired
- I don't recall and I wouldn't unless I had to. CLEs are very irritating to me. I have not seen anything useful come of them unless I chose them for a specific purpose.
- Yes, but not a CLE. I also teach at a university and it was required training.
- I only did because I was forced to. The Bar unfortunately makes this brainwashing part of its CLE curriculums.
- Would NEVER attend such a CLE. Why would I pay money to have politically correct nonsense rubbed in my face?
- Not sure why this is even asked. Most attorneys work in small offices with 1 to 5 people and
- "diversity/inclusion" quotas are impossible to achieve. Perhaps it would be relevant for larger law firms to be compliant with today's politically correct regulatory system.
- Military diversity training, not CLE
- Have I wanted to attend a CLE on "diversity/inclusion" (whatever those terms happen to mean this week)? No.
- How on earth can you avoid it

Question 76: How important to you is diversity/inclusion in the legal profession?

- I believe it is important to let everyone in to the profession, and there should not be barriers to entry. However, I believe the diversity/inclusion has gone much too far and that it is hurting things overall as it is disrupting hiring decisions and workplace environments. If a law firm wants to be all women, or all men, or all Latino, or all of one religion, I don't believe we should do anything to stop that. There is power in like-minded people associating together, and that power is lost when we lose the ability to create organizations that focus on one thing.
- It's very important if it means access to law by all, but it can be misused to stifle expression
- We always try to hire the best person of the job-- male, female, black, white, it doesn't matter.
- I don't want to play into "political correctness" and answer "very important" because I believe diversity/inclusion is being hijacked by special interest, but I do believe it is important to have discussions relative to latent and innate bias that we don't think we have
- We should always be inclusive, but diversity for the sake of diversity, if it means overlooking qualified applicants, is wrong.
- Persons have rights to equal treatment and equal opportunities, equal pay and equal education. "Diversity" is not a person, but a concept, and it has NO legal rights. Sadly, modern jurisprudence has created the legal fiction of "diversity" as a legally enforceable entity that has rights that override the rights of actual persons to equal treatment. It is an underhanded way for persons in power to manipulate the lives of real persons to their liking. One of the perverse results has been that elite institutions like Harvard actively discriminate AGAINST Asian American applicants, Everyone deserves and equal and fair shot, and should be placed on merit not on diversity and inclusion. We owe that to the public.
- Not relevant.
- adds to polarization and hatefulness
- Diversity should not be forced on the profession. The issue should be discussed, but the profession should be allowed to determine how to recognize diversity concerns and address those issues without de-professionalizing the profession.
- Respect for differences, tolerance, and diversity of thought are important. Those differences can include an individual's background differences and their individual story. However, enforcement of a percentage of skin tones, sex, or efforts to "police thought" seems counterproductive to true acceptance of diversity.

- I am somewhat in favor until it becomes forced resulting in resentment and backlash.
- It should not be important. The important should not be the color of your skin, gender, or sexual orientation. Lawyer should be celebrated for their abilities, not for attributes that are non-changeable. Doing so diminishes whatever race, gender, sexual orientation that you do not consider a "diversity" lawyer.
- I find the idea that someone has to tell me how to act somewhat irritating.
- All groups should have equal opportunity for inclusion, but inclusion should be based on merit, not quotas.
- Diversity/Inclusion is important but by the very act of licensing, attorneys are EXCLUSIVE - read humble and responsible to clients/society/law/constitution. Kindness, tolerance, diversity of thought are very important to the legal profession. Opening the legal profession to everyone will serve no one. Licensing should matter.
- I have not had personal experiences to form a strong opinion. I do feel that everyone should have equally administered justice (ie due process), but I understand that there are inequalities through culture, education differences, etc. To that end I would like to see the barriers to access eliminated.
- Most of my clients are minority so very important to me
- Overall, it is important in the profession. The relative importance in specific situations may vary.
- While I hope that all lawyers see the value, I hope that we get past the differences so that we are just good lawyers, not lawyers of different kinds.
- with my Latino background I experience the opposite of diversity & Inclusion especially in

Utah County

- I believe in fair treatment for everyone whatever you call it.
- to the extent it's important to my clients ...
- I agree with Martin Luther King, judge people by their character and content of their heart, not the color of skin, or anything else. Yet here we are all these years later with special awards, and "diversity" based on anything but a person's character or content of their heart. Isn't it interesting that there is no award for just an all around great lawyer regardless of anything else.
- Important if it is merit based
- Very important as related to thought diversity and respect for differences.
- Very important that I have diverse colleagues AND that I personally be accepted among my colleagues. It's frustrating when lawyers (almost always men) express the opinion that sexism (or any other ism) is no longer an issue among UT lawyers. It is.
- Just treat each other like human beings, for cripe's sake.
- People should have access to lawyers that meet their needs
- I need the term diversity/inclusion in the legal profession defined before I can answer the question appropriately.
- Socioeconomic diversity is important
- I believe in rewarding hard work and productivity. A merit-based system is the only ethical system.
- Important, but loses efficacy when politicized
- The best person for a task should do the task. As a minority, it shouldn't matter which category I fall in; if I'm not the best available person for a job, I should not get it.
- It's very important but I do not see it happening, in real time.
- I believe an outreach effort should be made to

include people from all backgrounds. I don't think there should be any quotas, written or informal. You should hire the best person for the job.

- its not important. Merit and thought diversity are the only ones that matter
- The most important thing is the competency and capability of individuals not their diversity.
- Very, so long as it isn't based on stereotypes such as these types of people need special treatment. One race or orientation is as capable as another and all should be treated fairly
- reverse discrimination witnessed all the time.
- Welcome everyone.
- Force feeding identity politics is divisive, not unifying.
- It's important that we promote being tolerant of different thoughts and ideologies. Reverse discrimination and affirmative action are not as important. I see people, not race or gender.
- Just be equal but not forced.
- I disagree with dividing people in the name of diversity--it is evil
- Being completely impartial about race, gender, etc., - Extremely important. Making hiring decisions based on race, gender, etc. - Not proper.
- It is important but not at the expense of competency. Members of our profession are our peers, last time I checked there were no race, gender, or religious restrictions on who can join our ranks.
- It's not important to me personally but I think people shouldn't be excluded
- look for meritocracy. We have some talented attorneys in our profession and I hope they all succeed.
- Depends on what diversity means

- "Diversity/inclusion" as I have defined it should have no place in the legal profession.
- Fine and helpful, but vastly overemphasized by media & other liberal groups
- Depends on what it means.
- Important if it is merit based
- depends on which definition of "diversity" you mean
- Inclusion is important, diversity for its own sake is not
- It is "not important" because everything should be based on merit, not artificial standards
- somewhere between neutral and important - perhaps helpful is the better term.
- It depends on what the words diversity/inclusion mean.
- Qualifications and personality are more important
- Diversity isn't important, but inclusion is. (I.E. different genders, ages, races, etc. are not important to me, but making everyone feel included - but not as a pity or obligation - is important). I don't believe diversity, in and of itself, is important. Quality of employee/lawyer is more important to me than merely seeking out diversity.
- I support it but it is not one of my priorities.

- Diversity of thought is very important. Other diversity tends to me more superficial, and not important.
- By your definition, or by mine? As understood by most people, it is not at all important to me and is a codeword for political views that I disagree with
- Helpful but misused.
- It is horrible and creates an excuse for the incompetent to keep their jobs
- Important only as far as standards are not dropped to try and obtain diversity.
- True respect of each person for the content of their character, very important. Political correctness, none.
- Someone once commented to me that "diversity" is really code for social activism and creating cultural conflict. I really don't care about any of those diversity topics. I can accept, like, and work with just about anybody ... and I have. You name the group, and I have friends and colleagues in it. But those activist SJWs that can't shut up about "diversity" as they envision it need to get a life and a meaningful career..
- How would I know? Does anyone know what "diversity/inclusion" means?
- If it were about respecting people and NOT

about discriminating based on race and gender, then I would be all for it. As implemented, these are usually just discriminatory programs in disguise.

- I think work/life balance and addressing changing legal needs is more important/pressing need.
- Enough of the poor me people. Seriously. I am a woman in Utah who was told I was taking a mans spot in law school and to go home to be with my husband and kids. Get over it. It is. I think g personal. Learn how to fight for yourself and make a way for others. So tired of this diversity crap....
- It is important to the extent it furthers access to justice.
- Depends on how you define diversity/inclusion.
- Important depending on the breadth of the diversity/inclusion definition or concept
- This is a typical loaded question. It should be worded fairly.
- Diversity/inclusion as pushed by the bar is extremely distructive to the bar. Note in your survey there is not answer that connotes a negative.

Question 85: How does your office advertise its legal services? Please select all that apply.

- website, CLE's, through the Bar, etc.
- NA
- referrals from referral groups such as BNI or allied professionals like CPAs and Financial Advisors
- Web site
- direct client contacts by attorneys
- Clients' word of mouth
- Government. N/A
- Letters To criminal defendants
- Bar website, Unbundled Attorney.com
- Networking and word of mouth.
- we advertise according to the insurance department rules and guidelines
- Website
- I'm not sure of other methods, but I am sure there are other methods.
- Does not apply - I work for the government
- Church bulletin
- Most of our advertising is earned media
- Word of mouth
- Word of Mouth
- Word of mouth
- N/A
- Word of mouth
- Presentations, e.g. CLE. Firm to client presentations.
- no legal services
- Government
- Non-profit: Presentation to other service providers
- In-house counsel website describing available legal services
- I am in house
- Word of mouth
- We do quality work and let money take care of itself. And it does. Have never advertised.
- Mailings
- while I work to reestablish myself in the community after moving to Logan for a year, I am using word of mouth/reputation. I plan to restart advertising and using social media etc. as soon as possible.
- Word of mouth
- firm website
- In-house attorney
- Not for profit
- Government law office
- mailers
- Client referrals.
- we don't advertise legal services
- 90% of my clients are referrals
- don't really advertise
- N/A
- No activity
- N/a
- NA-government work.
- website
- Only advertise company mining services, not legal services
- word of mouth referrals.
- PR not advertising
- n/a
- Website
- old-fashion phone book or just plain ol' word of mouth.
- Direct mail
- Other marketing companies
- recommendations from others
- GOVERNMENT
- n/a
- Networking
- Legal Services provides free representation, so often others refer to us. We advertise only minimally, to try to educate others on what areas of service we can help with.
- Attending public events
- In-house, so N/A, really
- Not applicable
- website
- Mail to general public
- no advertisement
- NA
- Don't provide outside legal services
- Q Pages, aimed at LGBTQ community
- I'm in-house. There should be "not applicable" option.
- N/A
- Not applicable
- None
- word of mouth
- email direct marketing
- word of mouth is how most things actually come in
- Informational pamphlet given to victim advocates.
- Government employee
- Government
- Not applicable
- website
- printed cards and stationary/word of mouth
- In house
- not applicable
- Seminars
- Does not apply
- Direct Mail Advertising
- NA
- Word of mouth
- I am on court mediation roster
- none. Corporate Counsel

- Govt attorney
- don't
- Not applicable
- web site
- Retired
- House counsel
- Networking/Referrals
- N/A
- My only "advertising" is on the Bar's website. FYI it works.
- Not applicable to government office.
- Word of mouth
- work for State of Utah
- website
- we are a nonprofit
- We do most of ours online but I'm not sure in what form
- Not applicable (in-house).
- website
- NA - I am an ALJ
- N/A - in-house counsel
- Word of mouth
- public speaking
- Referrals from clients and other lawyers account for the majority of our new clients.
- na
- I have a website and some directories listing me as a lawyer, but mostly clients come by referral.
- Word of mouth
- This does not apply to in-house counsel
- N/A
- Mailed out flyers

- N/A
- it has become the bane of the legal system. The lies told by lawyers who advertise would have had them disciplined in the days when the practice of law was a profession and not a business as it is today
- N/A
- Not applicable. I am a judge.
- NA in house
- Government
- Podcasts
- Not applicable.
- Word of mouth; relationships
- Word of mouth; seminars
- Personal networking, personal referrals, both of which I consider types of advertising.
- Lavender Magazine - an LGBT publication
- Referrals
- The corporation I work for advertises but not for legal services. Many of these questions need to include an answer for "not applicable."
- direct mail letters
- taking other lawyers to lunch
- No advertising is done we are a public defender office
- Other professional organization Journals
- No active marketing plan. Preferred provider for pre-paid legal insurance, maintain a website, tried SEO companies in the past but once the monthly subscription fee agreement is in place, no real follow up and no difference to the bottom line is experienced. Historically, we have relied

on repeat and client and network referrals. This works for general civil practice, but not for my partner's 'one and done' family, bankruptcy and criminal defense practice. Paid services of all varieties are too expensive to maintain for any length of time. Marketing is our greatest challenge! b

- Business magazines
- Retired
- None
- I'm a judge
- Website
- Word of mouth from former clients
- Referrals
- podcast
- I work at the AG's Office. The office promotes its work and programs, but I wouldn't say the office "advertises."
- Personal visits.
- Na
- 100% networking
- Relationship marketing/networking
- in house - n/a
- Not applicable-in house
- We don't advertise

Question 89: That completes the survey. Do you have any additional comments you would like to add?

- Thank you to the Utah State Bar for conducting this survey. Surveys like this should be completed at least every five years.
- The single greatest suggestion I would like to make of the Utah Bar is to publish a series of Bar Books as other jurisdictions have. They are incredibly helpful and I'm very envious of practitioners in other states that have access to these materials.
- The Utah State Bar should reject the recommendations in the "Narrowing the Access to Justice by Reimagining Regulation" document, as it will greatly harm attorneys, especially solo law firm practicing attorneys, like me, as well as small law firms, and the public to allow ownership of law firms by people and companies that are not lawyers. Far more problems will come than will be solved, despite the claims in the report to the contrary. Further, once people and companies who are not lawyers or law firms are able to own law firms, it will one, be the companies that can spend the most on advertising that will get the vast majority of clients, despite My evaluation of the honesty professionalism and ethics of attorneys in Utah is specifically based upon my interactions with the Utah County Attorney's office and the prosecutors they're in. Their office is corrupt and should be investigated.
- The Utah Supreme Court's current "Disruption of the Practice of Law" project spearheaded by Justice Himonas and several yes men/women poses a serious threat to the practice of law in Utah. Not only are they threatening to renege on a long-standing promise that we all relied on when we paid the significant price to overcome the traditional barrier to entry to the practice of

law, which will force many, especially young and solo practice, attorneys from the practice of law and leave them with no clear way to retire their significant student loans, but it will also cause many unsophisticated consumers of legal services to receive a lower level of Lawyers need to be nicer to each other and to remember that but for the grace of God they would be on the other side of the case

- fostering diversity (gender, ethnicity, color, religion, political affiliation, etc.) requires a concerted and conscientious commitment. It's not going to happen by itself. And the Utah Bar should consider this one of its primary functions moving forward. The Bar, the Bench, the Utah law schools, should all reflect the growing diversity of this state. And nobody can credibly claim that it currently does. Let's get to work.
- The Utah State Bar, through the funding by bar dues, should exit "Access to Justice" types of activities and allow IRC 503(c) entities take over those activities.
- Please maintain the 2-year CLE cycle. If at all possible, please provide more no/low-cost ways for non-working but actively licensed lawyers to complete CLE. Please allow more CLE credits to be completed online.
- Thanks for soliciting the feedback.
- Regulate the "One call that's all" ad. It's demeaning to the Bar.
- It may be that the overwhelming majority of Utah lawyers are litigators, and if so it is perhaps appropriate that there is such an emphasis on courts and litigation. (Even this survey has a tint of that: for example, question: is your practice mostly civil litigation, criminal litigation, or neither.) But for those of us who never see a

courtroom, there isn't too much of a home.

- I am very concerned that the practice of law might be negatively impacted, especially by a loss of independence and an increase in conflicts of interest if non-lawyers become owners of law practices.
- Much of this survey focuses on law firm and solo practitioners, not on in-house lawyers or government.
- Stop with all the emails. I don't know how you guys get around the CANSPAM Act, but it is utter nonsense. Some weeks I'll get 10+ emails from you, none of which are worthwhile to me. If you want to send out legislative or court updates, put it into a monthly digest email. I simply delete anything from the bar, as it is almost always garbage.
- Also, quit selling my email to CLE vultures. You've created an unneeded industry and I really don't appreciate getting barraged with their sales BS.
- Re: Civility - I practice primarily in the Second and First Districts. More and more, I deal with attorneys from the Third District. While many are fantastic to work with, the majority of the problems I have with other attorneys are from the Third District. I truly believe that it has to do with the mentality that it will be unlikely they will deal with us again and therefore can "get away" with things that you can't get away with if you regularly practice in such a relatively small bar as the First or Second District has - your reputation would be destroyed in a heartbeat if you acted that way. While this is a relative few, a few rotten apples... I do appreciate the efforts

- As a general matter, the Bar has too much regulatory power. Please do not increase your regulatory anymore than you already have.
- Attorneys should be allowed to solicit clients, with the requirement that a standard, large print warning be given to the client and signed by the client and the attorney, advising the client of his/her rights to direct the attorney, to have the attorney respond to communications timely, to handle client funds with integrity, and to fire the attorney if they are dissatisfied. I believe that would correct an abuse of the public that occurs when an adverse party approaches someone who has a tort or contract claim before they are represented by their own legal counsel. Every proffered settlement should include a standard advisory of the potential claimant's Ethical considerations owed to a client prevent me from telling the State Bar how I feel after 41 years of practice.
- In regard to the plans to open up ownership of firms to non-attorneys, etc. (all in the interests of "access to justice"), what you are doing is following a similar path that occurred with the creation of Uber, Lyft and various other online groups which proliferated the "gig economy." What you are unwittingly contributing to is a race to the bottom where yes, things *might* be opened to more access to legal services, but you are reducing the quality of said services, impoverishing the poorest of attorneys (such as myself), but enriching the wealthiest of attorneys who have partnered with tech oligarchs. Thank you for helping ruin my life.
- My biggest concern with the bar is expenses. Yearly bar dues are expensive especially for a solo part time practitioner. Conventions and other Bar sponsored CLEs are expensive as well. I'm not typical demographic: full time non legal job and take a case once or twice a year. Bar dues and CLE expenses far exceed income.

Perhaps have a category for part timers with reduced dues.

- I am shocked by the lack of professional and ethical conduct by attorneys and Commissioners. It is very disappointing.
- waste of time
- This survey was way too long. I wanted to stop taking it several times. More frequent surveys and more discrete topics is better.
- Rules prohibiting certain types of advertising typically help the established attorneys and not the young or unestablished.
- I think you should make it harder to become a lawyer and make sure that lawyers are competent in the specific fields they represent.
- Your question about hours worked in a month is unhelpful where you have 160 hours as the lowest amount specified. Really? And there is a selection for more than 320 hours in a month? Seriously? I work about 75 hours a month. You have questions relating to part-time work so your ranges of hours should match.
- It is a recipe for disaster to open/deregulate law-firm ownership, allowing non-lawyers to own law firms. **Strong opposition.** I am wary that access to justice is being used as a pretext for other agendas/special interests. This comment box isn't long enough to express all that I might have to say on this topic. We are and should remain a profession.
- Not all programs should go to the lowest common denominator. Not all decisions should be based on that either. Highest quality, highest performance, highest standards and fair competition should be what drives Bar decisions - if we really want to provide the public with the best service and the highest quality profession. Problem areas should not be a tail wagging the dog. For example, if some feel Sun Valley or San Diego or Del Coronado are too expensive, then they can attend Spring and Fall and all the

other CLEs. Don't cancel the only really nice one just because some cannot attend. Affirmative Action does not work to the benefit of the Thank you for your excellent leadership.

- Most of these questions assume I work at a firm. More questions need a "not applicable" option for people in less traditional legal roles. I couldn't skip questions that didn't apply, so my answers will probably throw off your results.
- A climate of partisanship ,e.g. Sen Schumer terrorizing the US Sup Ct on the steps of the Courthouse, prevails. The roots of this divide must be traced to their source. Remedies applied.
- Thanks for doing a great job running the State Bar.
- When writing surveys like this, please get input from attorneys working in-house and who do not litigate. SO many of these questions needed more options for people who aren't private practice attorneys that litigate.
- The two separate fees for CLE filing was confusing and caused me to incur a large penalty. Why not just have one fee instead of two?
- Gender discrimination is a serious issue within the Judiciary as they relate to the attorneys appearing in their courts. Perhaps the Bar should address this issue.
- Have not practiced in Utah for nearly 15 years (military service).
- I'm a member of the Bar. I truly have no idea what purpose you all serve. I mean, I know you license and such. But you don't seem to do much for lawyers otherwise. It always seems like a racket to me. Maybe it's not, but you've done nothing to convince me. I figure you should know that.

- I think the bar needs to take more time studying the corporate practice of law before opening pandoras box
- Thank you for this quality effort. Everybody who spends the time to complete it should get an Oreos shake...I'll buy the first 25 !!
- The bar seems to be becoming more politicized, more special interest oriented, and less representative of the bulk of its members.
- Portions of this survey could have been completely bypassed with some gatekeeping questions, such as "are you a government attorney?"
- I think the regulatory reform will create at least as many problems as it solves. Anyone who knows anything about sandboxes knows they frequently contain unpleasant material. It appears someone wants to replicate what has happened with the delivery of medical services, which is a major disaster.
- The Bar is not useful for most of attorneys. I think it should not be mandatory. I also think it often works against its members. This legislative session it opposed bills that many lawyers supported. It should not take such a stand with my dues.
- Once I indicated that I was retired, it would have been nice to have been detoured around the questions directed to those actively practicing law. There are probably other categories of attorneys such as in-house or government that would have benefited from a detour.
- I have been honored to be a lawyer. I have been very fortunate to work with and against very fine lawyers. I was involved in promoting civility from the beginning of my practice. I wish we had done better with it, but feel that we could have done better. I have been very involved in Bar work and have been richly rewarded by doing it. I have had great relations with the Bar and its staff. I hope this is the place to say so, but one

way or another, Thank you.

- Big Store law at the expense of small law firms will hurt the very people the change in regulation is trying to protect. The Utah Bar is not honoring its fiduciary duty to its own members. Professional independence will be declared dead by non-attorney shareholders.
- With regard to professionalism and civility and the decline of such in recent years, there are no teeth to the Standards of Professionalism and Civility. We hold regular CLEs and are required to attend certain hours every reporting period, but it is meaningless. Fortunately, most members of the bar are professional and civil, but there are a few who violate the standards almost as a matter of course. They should be disbarred but the rules/standards are without sanctions and are meaningless. We need reform on this issue.
- Myself and my family lawyers are super unhappy about the Paralegal practice rule and fail to see how or why our dues have been used to support this program without our approval.
- My practice area (patent prosecution) limits how much I interact with the Utah bar. Other than the IP section there isn't much that interests me. I live and work in Davis County but I'm not aware of any Davis County bar organizations or events to meet together or provide pro bono service up here.
- The Utah bar should consider an International Human Rights section for its practitioners. Please contact me if you wish to discuss...
- As a Bar, we need to work MUCH HARDER on recruiting members who are black, Native American, Hispanic, and refugees.
- Thanks for asking my opinion. I thought this was a very good survey.
- The questions regarding getting hearings is poignant. Just the other day, we tried to get an expedited hearing that the Court had already

indicated they would issue, but still had to wait more than 30 days for the hearing. This happens all the time. I realize the Court is busy, but I would love to see the Bar get involved in improving this. Commissioner Luhn's and Judge Chon's offices are the worst to work with. Unprofessional staff and huge backlogs.

- Unacceptable.
- Nope.
- I think some bar initiatives have a detrimental impact on the everyday practice of many lawyers. Specifically, the claimed access to justice initiative might be bearable for large firms that like self-congratulate. But, for members of smaller firms or solos, this hurts their business. Allowing paralegals to perform attorney functions is going to hurt the public and attorneys.
- This survey was a waste of my time. My bar fees are a necessary cost of doing business; they do not add much value to my practice. Surveys such as this seems to be largely "solutions" in search of problems.
- This survey is very law firm oriented. You should probably just send it to law firm attorneys.
- Hold more bar events/conferences in St. George or Las Vegas (or other places away from SLC). Let's get out of northern Utah! For example, the Nevada State Bar holds its annual conference in a different non-Nevada city each year (the last 3 years it's been held in Austin, Chicago, and Vail - and next year it will be in Hawaii). Makes it more than just a CLE event and draws a very large crowd.
- The Utah State Bar does not make it easy for solo practitioners and small firm attorneys with advertising and solicitation rules.

- There are a couple of really awful judges. They are universally regarded as incompetent, lazy, prone to prejudging cases, chauvinistic, look for the easiest way out of case/least amount of work, etc. There needs to be a better way to get them off the bench, a bench which is otherwise exemplary. For judges that are incompetent, it is not enough that the errors of these judges can be corrected on appeal. Most clients cannot afford to litigate in the district court and should not have to wait for a year or more for an appellate court to reverse a decision. Therefore, it is unreasonable to respond that errors can be fixed on appeal. This also does not. Most judges are great. Some have a bad attitude or biases and at least one, strays often from sound legal reasoning.
- In my eight years of practice, I have seen a general decline in attorney's willingness to discuss matters over the phone and instead rely solely on email communications. I believe the Bar should address this issue and recommend updating the rules to bar an attorney from refusing to engage in phone discussions without any basis.
- Thanks for your work on behalf of attorneys in Utah.
- I miss being a full time practitioner, but find that my legal experience is helpful in my church experience.
- I went fast but It took for than 15 minutes
- I would like to see a change that judge's clerks do more by email, like setting hearings and communicating with the attorneys so we don't have file Motions and such to change hearings.
- I have attended the Summer Convention, the Spring Convention, and the Fall Forum on occasion, but I don't regularly attend them because I get my CLE elsewhere. I only attend when there is a speaker I really want to hear or I have some other particular reason to attend.

- I hope we go back to Sun Valley for the Bar Convention, with Supreme Court justices visiting.
- Thanks for your hard work.
- I work primarily in administrative law (immigration) so that may affect the way my answers should be understood. Also, when I commented about interactions between lawyers, I was not responding within my practice. I was responding based more on what I hear from other attorneys who do civil litigation.
- I am against non-lawyer ownership of law firms. Horrible idea, especially in PI. If we look at other states, we can see what will happen. Super dirty and super grey. Not a good idea.
- I think staggering CLE as 'beginning' or 'intermediate' or 'advanced' is dumb. I think the growing requirements to teach a CLE are making it increasingly difficult to find anyone to be willing to teach - which hurts us all.
- 1)
- I think that the rules of professional conduct are very well written. However, they are nearly useless, because they are not enforced. Those who are professional enough to adhere to them would do so regardless of the rules. Those who are unprofessional, continue to be unprofessional despite the rule, and there's really nothing to be done about it.
- Although I understand that enforcement of professional conduct rules is not an "easy" thing to implement, and issues would arise if the Bar tried to strictly enforce the rules, I wonder if there is more we could do. I found myself very frustrated when working with one attorney, this last year, who was unusually unprofessional and unethical. It seemed like every attorney practicing in his area, and even the Judge handling our case, knew that he was an unprofessional bully. Yet his conduct did not rise to the level where the Judge could hold him in

contempt, and I was told that a bar complaint would be unwise and "not worth it" because the Bar wouldn't

- 2)
- I would like to share an experience I had this last year, although I'm not sure what could really be done to solve the issue. Opposing counsel on one of my cases (still ongoing) has repeatedly acted in ways that made me uncomfortable. The first time I met him, he put his hand on my thigh while talking to me. I have since been careful to avoid physical proximity to him. Then, throughout the case, he would call me, but would not talk to me about case-related issues. Often, calls with this attorney would take 30+ minutes, during which he would talk to me about his personal life (his hobbies, his past career, his vacations, his wine collection, etc.), Although attorneys may go to great lengths to follow the rules for IOLTA accounts, unexpected minor technical problems may arise that require correction even if no client funds are compromised. It would be nice if the BAR took a more helpful approach to resolving minor issues that occur in connection with good faith efforts, rather than sending threatening demand letters or instigating heavy-handed investigations. Just a reminder that in addition to regulation and discipline when justified, the Bar should be providing a helpful service to busy attorneys who are doing their best and who provide the funds to run the office in the first place.

- Being a lawyer is extremely taxing, both emotionally and physically. The stress of it gets to you and has been reason for two of my close associates to suffer either a stroke or stroke-like symptoms within the past two years. I truly believe we need less involvement from the State and more liberty to manage our own well being. This includes reducing costs of licensing where possible and having an Office of Professional Conduct that is understanding of the practice and not looking to cause problems for attorneys where it is not truly in the public interest. This only causes undue stress and in many cases is not serving the public interest. Given Please add transactional practice CLE classes (lending, leasing, real property sales)
- This survey seems pretty useless.
- Bar fees are too high, and the bar tries to do too much. My bar fees in NY are much lower.
- I am also very disappointed with the support of the bar on behalf of the tax reform that was overturned this year. If the bar was truly concerned about clients, we wouldn't be supportive of a bill that gives exemptions to attorneys, but then adds taxes and compliance issues for those very clients trying to run a business or just trying to buy gas and groceries.
- I'm grateful for Mr. Baldwin and his many years of service to the organization.
- The professional practice of law in Utah is currently under serious threat from the "Disruption of the Practice of Law in Utah" currently spearheaded by Justice Himonas. Our current system of training and licensing has been built up over generations and involves significant barriers to entry in order to ensure that licensed attorneys have at least a baseline of competence. As a result, every lawyer in Utah has paid a significant price, including but not limited to incurring significant student loan debt, in order to practice law. We already have a lot of

competition among Utah lawyers, which leads to significantly lower hourly rates being charged. We Criminal defense attorneys don't have any code of conduct that they are ever held to by judges or the bar. They can lie, cheat, and steal... but as long as its in their client's interest you give them your blessing.

- The Court should have a full-time fairly compensated lawyer that monitors filings for ethical obligations and fine lawyers that are caught lying rather than advocating
- Lower our dues
- With regard to diversity, There is such a push for diversity that I have literally seen opportunities for me, a middle aged, white man, disappear to make room for women and POCs. I know it sounds like sour grapes, but it's true.
- Utah should have a diversity/bias CLE requirement like other states do. There is still a lot of work to be done in this area.
- I greatly oppose the recommendations in the Narrowing Access to Justice Regulatory Report, paraprofessionals are now permitted to practice in some under-served areas of law, I think we should let this program flourish before substantively changing the practice of law in the state of Utah. Many attorneys in Utah, I believe, are small business owners and employees and the proposed rule changes will greatly hurt them.
- Bar dues are too high and should be segregated into core licensing functions and the more club-like functions and other initiatives it often undertakes. It shouldn't cost multiples of a physician's license to license lawyers. Unbundle bar rates.
- Need more state judges, especially with civil experience.
- The practice has a lot of work to do regarding race, gender, and sexual orientation. The efforts to improve in these areas seems to have

created a backlash.

- As a military attorney many of the questions did not apply to me, but overall I think the BAR and the Judiciary in Utah are doing great.
- The results will be skewed based on the questions and lack of ability to explain the answers. For example, I'm in-house and so my answers about law firm questions are not relevant, but I had to answer to go on to the next question, skewing the result.
- We can't continue with 20th Century litigation concepts to provide services to a 21st Century community. We need to become skilled at designing solutions to problems, not just fighting to "win." We need processes different than discovery, negotiation, mediation, trials and appeals. There are far better ways of resolving issues, if only we would make them available.
- Utah's in-person CLE requirements are outdated and ineffective. As a result of in-person as opposed to webinars and other online forums (e.g. through PLI), I end up having to attend CLEs that are not at all relevant to my practice area and that often only provide UT bar credit and do not include credit for the CLE requirements for my out of state bar.
- I take a dim view of the Bar allowing lawyer partnering with non-lawyers, i.e., rich people in essence "owning" law practice(s).
- Do you really think this survey only takes 15 minutes? Try taking it your self and see. Thank you.
- 1. ageism at law firms and in-house counsel positions and 2. the bar conferences feel too exclusive

- For solos who work from home doing criminal or family law work, the requirement to place attorney address on website can be dangerous for the attorney and their families. Can the rule be changed to not require the address of the attorney responsible for the advertising material or website? If someone really needs to contact the attorney at a physical address, they could go through the Bar. Continue to require attorneys to have updated addresses on file with the Bar. I feel strongly on this point.
- I feel that the Utah State Bar has become a very negative organization to attorneys. I have had a past client looking for my contact information on the bar website and it turned into an investigation- though completely meritless. The bar could have directed my past client to the directory which was up to date. There wasn't any vetting done to see if the person out of contact with me was someone I owed any ongoing duty. Every contact or complaint is treated this way according to colleagues and friends in the practice. I have a very negative view of the bar and that is too bad, because it hasn't always been that way.
- This survey was far too long.
- I am concerned that the Utah State Bar is allowing non lawyers such as LLPs to provide legal services yet apparently providing the same regulation. In my view, this is not right
- The efforts to cheapen legal services by allowing licensed paralegal practitioners and expecting us to charge low-bono fees to the general population has a disproportionately negative effect on small legal practices.
- My advice to young people considering practicing law in Utah is - DON'T. Unless you're in a skyscraper these new programs and policies only serve to devalue and undercut lawyer compensation and lessen the clientele available.
- That's great that Judge Himonas can command \$500 per hour (per a recent Salt Lake Tribune article) but he and those in offices with marble floors making the policies don't seem to realize that the rest of us actually have to make a living by representing normal people. Or maybe we should all just represent the super wealthy?
- I don't think the authors of this survey are good at billable hours. It took longer than expected.
- I hope my comments help.
- Many of the questions do not apply to in-house attorneys. I work in a Utah office for a Georgia based company and my interactions are primarily with non-attorneys or attorneys across the country. My answers may be non-standard due to this.
- Don't be afraid to stretch and try new things. Seems the bar leadership is a bit stale - shake it up, come on. Even, I am female, we have heard enough from the Gail Miller's of the world - get some big names and worthy speakers at the conventions and CLE's. Also, get more creative on topics, venues and ways to earn those expensive hours of mandatory CLE. I do applaud you for this survey, it is a refreshingly good start. Keep your finger on the pulse of the members, especially the younger Bar members.
- Attorneys are manipulating the court system by not appearing in person particularly if they take cases away from their home base. Attempting to handle their matters by phone imposes upon all the participants including their own clients. Phone appearances should be HIGHLY RESTRICTED. Self-Help and paralegal services have ruined the major areas of practice.
- The Bar needs to better support ALL its lawyers not just the ones at the largest firms or who have family history ties to this state.
- I think the Utah Bar should advertise the positive work that members of the USB do in the community. We should "toot our horn" to create a better image of lawyers in general.
- The ethics section of the Bar Journal written by Mr. Call each issue is largely irrelevant and under-researched. I would like to see a more serious discussion of ethical issues, particularly how lawyers and judges can deal with the issues they face regularly that don't invite an easy answer.
- Advertising has played a primary role in the decline of attorney respect by the public. It has also reduced the status of attorneys from that of a profession to that of a business. The result of advertising has been to allow those who are less experienced and less competent to build practices on false claims as to ability and results, rather than actual competence.
- I work in LA for the federal government so many of the questions do not apply.
- survey was too long
- Please return the summer convention to Sun Valley, Idaho. It is the very best location to hold this function. It is the perfect distance from my office and has a wide range of activities for my family to do while there. I will always attend when it is there. I will seldom attend when it is elsewhere. I will never attend when it is in my back yard in Park City.
- I am concerned about access to justice, but I worry that some of the proposals in the new reforms are not going to provide that. They are interesting and noteworthy in terms of "disrupting" the legal profession, but I still fail to see how this is directly going to impact access to justice. I see more dangers with some of the impacts to fee sharing and advertising that may negatively affect the public and practitioners. I do see some benefits to allowing non-lawyer shareholders, but again, I have a hard time imagining how that is going to help the public increase their access to justice.

- I mentioned it previously in the survey. I have attended the Summer Convention once. It was a great experience, but distance/cost/time constraints often make it difficult to attend. If I could get a pass for a single day of the convention that had the presentations that interested me most, I would be more likely to participate. Also, it might be good to have separate pricing for government/private practice. When I went it seemed like there were relatively few government attorneys there and it might be because of cost of attendance.
- Thank you for allowing DACA recipients to practice in the state of UT. I am not one, but have several classmates who will benefit from this policy. :)
- Very happy with new licensed paralegal program.
- For decades you have done absolutely nothing to help small or solo firms. All you do is demand money every year for the so called privilege to work in my profession. You have a huge office dedicated to sanctioning and disbaring attorneys, but no office to defend them. You should be ashamed of yourselves for taking our money and doing nothing but running an elitist club of white shoe firms and serving no one but yourselves. Go jump off a cliff.
- I'm in house so many of these questions didn't apply but there was n/a so I stopped answering
- We should change the CLE rules to permit all CLE credits online and encourage provision of free and low cost CLE.
- The survey is so practice oriented. As a business executive, very few of the questions apply to my circumstances.
- Polygamist lawyers are the very worst for honesty and professionalism.
- The section dues are a ripoff for nothing. It was so expensive to pay out of my pocket for the Utah bar application and NLTP. My employer

paid my dues, but I paid section memberships for two sections out of my own pocket. I received nothing for this, not an email, not a meeting announcement, nothing. I contacted a section leader to make sure I had been added to the email list. At the same time, I contacted the bar about the problem and they told me the section just had no activity--I would not have given you \$75 that could have paid for groceries had I known. As to both sections, it was not until about 7 months after I paid to join that I finally Way longer than 15 minutes.

- A lot of these questions didn't really apply to me at all so I answered neutrally to many of them or didn't answer them. I work in house for a corporation and most of the questions were geared towards lawyers that work in law firms.
- The family bar in Utah is one of the most unprofessional and cutthroat practice area in all of the states that I have experience with (practiced in WA and CO). One of the biggest reason for this is the commissioner system. Temporary orders proceedings have become too high stakes, which makes the outset of a case unnecessarily combative. Without any real standards on evidence, clients feel unrestrained to gaslight and take extreme positions. Because too many attorneys in the family law bar enter the practice of law by opening up their own family law practice, those attorneys have no incentive to be congenial or to work towards resolution. I entered the legal profession with higher expectations of those in the field. I felt like we should be cutting age in advancement of equality. Yet I found some of the most archaic backward old school thinking among the practitioners. I was told it was a waste for me to get a law degree if I wanted to raise children. I found I could not win here- I was wrong to be a woman in the field who "should really be at home with kids" and I was wrong to be a woman

taking a place from a man in law school and workplace if I "only" wanted the education to later work part time so I could primarily raise my child. I was told by another lawyer he was "sick of people

- I had expected that most people in our profession to be interested in justice - not just in winning or doing what their client tells/pays them to do. Especially in family law it seems Too many lawyers cannot stop thinking in terms of "win-lose" and cannot stop arguing for as much as they can get instead of looking at what might be fair and reasonable. I always told clients I would not represent them in seeking things that were not fair or just or moral- even if what they asked was legal. Especially if children were involved. And yes "just and fair" can be a little different for different people - but there are some clear parameters. More Lawyers - especially If I could do it all again I am not sure I'd choose the legal profession.
- Make the conditions for retired lawyers who primarily do pro bono work less onerous. We would still like to be useful.
- This survey cannot be completed in 15 minutes. Had you been truthful, I may not have taken it.
- The legal profession has cannibalized itself with too many non-lawyers providing legal services (e.g., real estate agents providing contract work) and too many attorney competing for the same small pool of potential clients. For this reason I moved out of state and even in other states the traditional "lawyer" is becoming a thing of the past unless you join a large firm and work your way up the chain for 15-20 years. I would never have become a lawyer had I known that to make a living you have spend more money on ad words than the revenue you bring in. I'm actively looking to get out of the legal profession. (FYI - I prosecuted for 5 years in

- I have been disappointed that the July bar conference was moved out of Sun Valley. I looked forward to taking my family there each year. San Diego was a fun location too.
- Yes, the Lund/Himonas report on access to justice requires careful review by the bar. If the recommendations are implemented as proposed it will do serious damage to the bar and the progression as a whole.
- Of the lawyers I know, most "belong" to the bar because they must, not because they see value in what the bar provides.
- I have significant concerns about the proposals to expand the reach of paralegals and the negative impact on clients. We seem to be overlooking the downsides of the proposal, namely the skill level, lack of supervision, risk of malpractice, and cost to clients (it's not the bargain advertised).
- Those pushing the initiative aren't considering opinions contrary to their view, helpful suggestions, or red flags.
- As a retired District court Judge doing mediation my greatest concern is lack of access to the courts by a large number of people with family law or smaller legal issues. The cost in both money and time prohibits many people from fairly accessing the courts. Also in family law the lack of timely rulings creates significant problems for families especially children caught between fighting parents. Either commissioners need more authority to resolve disputes or Judges need to be more available. I do many mediations where both parties and their attorneys are very frustrated that they can't even get before the court in a timely manner to resolve a This survey was clunky on my phone. For some questions there was not an option that applied to me or a n/a option. Took longer than 15 minutes.
- Not applicable to me on many questions as I'm now retired. Sorry
- The Equal Access to justice proposal is a joke. It

is letting businesses tell attorneys how to run their practice without being aware of legal or ethical obligations to clients as well as hurt the ability of attorneys to earn a living. The Bar should be looking for ways to support its' members instead of looking for ways to undermine their abilities to earn a living. Never been more disgusted with the bar.

- I previously practiced in California and feel that the professional treatment of female lawyers in Utah is markedly worse.
- It took longer to complete than advertised
- I'm glad my legal career is over. I would hate to be starting out today. I think practice in the past 50 years was better. Don't put me in the drawing. I really dislike the Amazon monster!
- I wish the Bar would be more of a resource for practice management and help support the profitability of firms and attorneys rather than always seeking to undermine them instead.
- The bar needs to come into the 21st century. Stop living in the early 90's. Learn how to properly do online content, get a real website, and get professional consultants to help.
- We need ethics with in the OPC that reviews ethics complaints against attorneys and judges.
- Please offer more cle on implicit bias
- Pay more attention to the lawyers. It seems that the Bar supports everyone else more. What are we paying our dues for?
- Stop putting massive amounts of pressure on brand new or young lawyers to do pro bono work. For the most part, new attorneys cannot financially afford to do legal work for free - especially if you consider most of them have a large amount of student loans when they begin their career. If you're going to put pressure on any group of attorneys to do pro bono work, go after the attorneys with 15+ years in practice. These attorneys will, more likely than not, be able to financially afford taking on cases for free - plus they've got the years of experience to provide a high quality work product for

individuals who can't afford legal services.

- Stop Justice Himonas's efforts to dis-integrate the Bar.
- Today's social media in some ways has its own regulations that people can submit online review. If a client has an issue, they let the public know.
- The Utah State Bar is next to useless in the context of my practice.
- Immigration is a hot topic but is constantly ignored by the bar. We immigration attorneys are dealing with a lot but really with no support from the bar.
- It is very hard to pay the very expensive Bar dues each year as a self-employed part-time attorney. I wish the Bar could figure out a way to reduce the dues.
- On the diversity questions, I'd like to note that of our six attorneys two are female and one is Asian female, even rarer among Registered Patent Attorneys.
- The answer to tackling the majority of unrepresented people in civil cases (collection and eviction) is to allow non licensed people with specific training to perform limited representation. This could be done at much lower and affordable rates. Answer preparation would be done with some direction instead of what we have now and in court appearances could be affordable to low income individuals.
- I sure hope this survey is anonymous.
- I like some of the things the bar does and am not opposed to it generally, but I am forced to be a member of it even though I don't want to. Please keep costs as low as possible, especially for solo practitioners like me who are struggling to get by from month to month. I really can't afford to be paying \$500 +/yr just to be a member of the bar that does very little, if anything, to help me make a living. That said, I do appreciate your efforts to do what you think is best.

- As a government agency that does not have clients, bill or engage in some other activities referenced in your survey, it would be helpful that if an answer was "no" to questions regarding billing, for example, that the survey would skip all subsequent irrelevant questions.
- Why can Seigfried and Jensen say their services are free and they don't get paid unless the client gets paid. They charge an arm and a leg using contingency contracts. The ad is misleading.
- I worked hard to become an attorney, I have decades of experience, I don't want to lose business to non lawyers. Please
- The Bar should consider putting together a committee to study whether CLEs really have a positive effect in the practice of law. I can see requiring CLEs for new practitioners, but after five years of practice, CLEs should be optional and the offerings should be practice area specific with real nuts and bolts application, not the fluff and stuff that is shoved down our throat. Sorry, but I am sick of wasting time and money just to fill CLE requirements that mean nothing to me.
- Since the Bar does not enforce unauthorized practice of law rules, the bar should divide into barristers and solicitors, like in England. Currently, the bar is run by and for litigators. transactional attorneys are an afterthought; only appreciated for the dues we pay in exchange for nothing. If you are going to allow CPAs, insurance brokers, financial advisers and others to advise on legal topics, you should not require me to take CLE or abide by conflict of interest rules since they do exactly the same thing without incurring those expenses.
- I find it repulsive that the Utah State Bar spends the money I pay in dues to establish programs that are implemented to take work away from me. I find it even more repulsive that my money is spent to advertise these programs on buses or elsewhere. There is no other professional organization where members pay dues for the purpose of destroying their own income. It is

unimaginable that Realtors, for example, would establish programs for people to bypass using a professional realtor, and even pay for advertising that encourages people to look elsewhere for help in selling or buying real property or even encourage people to sell their property I think the ethics hot line is a joke. I have tried to call and get legal help and they refuse to give an answer. I think that in regards to disciple solo practitioners are held to a higher standard. I do not view that the disciplinary committee is made up a fair representation, government attorneys do not understand billable hours and angry clients. I am not sure what the Bar is doing to help the attorneys. There needs to be more reaching out. Attorneys are drowning and if they ask for help they are worried about getting sanctioned or turned in by other attorneys. The attorneys that do need to be sanctioned for being horrible never get written up in the I'd love to not be part of a mandatory bar membership. Other than the disciplinary reports and the bar directory, I haven't benefited from anything and it's quite costly to be part of something that pretends that I, as a rural attorney, don't exist or matter.

- Social media allows incompetent and/or unprofessional lawyers to present themselves as experienced and successful simply because they say so. There should be standards
- 1. In my CA Bar Journal they have articles and self-study CPE. I would occasionally do that. It could be tied into Bar conferences (or stand-alone) so that it could earn credits.
- 2. Other than field-of-practice, is there a way to aggregate attorneys by school, or hobby or other way to meet. I would be interested in an English study course for credit. My friend from law school started a legal mystery book club discussion group.
- 3. Is there a way to partner with an accreditation organization so that CPE counts toward something ...like units in Masters program or

certification for specialty.

- 4. I liked the pro bono clinics which taught skills that I don't have and would like to do that -- however, I do not want to take away someone else's livelihood -- in areas such as litigation, truth checking, maybe even politics.. It would invigorating to have a cause.
- Stop sending me so damn many emails
- The Utah Bar should involve itself with Driver's License Administrative Hearing Officers. Many of these officers are abusive and uncivil with attorneys. As quasi-court officials in the administration of justice, their conduct has a significant impact on the community.
- Civility and professionalism: the attorneys who need it don't care and the attorneys who don't need it are over-educated/ over-kind. You can lead a horse to water. There are some real jerks out there, and it is hard to appropriately/ civilly bring that to the attention of the court or to the bar.
- My opinion on lawyers is based on the lawyers I dealt with in Salt Lake. In my new location, they're far more professional, honest, ethical, etc. The attorneys I worked with in Salt Lake were awful and made me hate my life and the profession.
- The Bar and the Utah Supreme Court need to do less to regulate and govern the legal profession. Lawyers are over-regulated. The Utah Supreme Court seems to amend rules every day. It is ridiculous. I had an old lawyer ask me the other day if that is all they do, namely, just amend rules.
- Hint: Adding complexity to the Civil Rules does not decrease the cost of legal services.
- i'll say it again. A la carte at the bar convention would be great, at least when it is in Park City. I would pay for just one or two of the events. But I don't want to pay \$500 if I can only go to one or two of the events, and in that case would go to zero.

- The Bar is not standing up for the integrity of the processes for selecting federal judges (Kavanaugh) and will not take no stands re the protection of our institutions -will take no tough stands. The bar takes a pass on the very issues we should be most concerned with. Pleased with the work on delivery of legal services to those that cannot afford it. Difficult to connect up with people at the Bar office. Admissions process has been punitive and designed to punish persons for their youth. The emphasis on civility and professionalism seems a bit overdone and self congratulatory on the part of the bar, and the credits typically contain little meaningful I am totally opposed to billboards, tv and ads. I think it is damaging how people in need of those types of services are treated in the end. Personal injury settlements are not worth as much as they were 20 years ago and I believe it has to do with public perception and people are tired of it so they don't listen to attorneys in court are saying as much. I am a PI attorney. It won't change as for the most part the ads themselves are not offensive or carry a bad message they are just more prevalent than churches or car sales ads.
- That "accidental" email from the UT bar a few years ago with a topless woman photo was really really insulting and I found that my opinion of the bar plummeted after that (especially since it seemed like it was swept under the rug and not really acknowledged by the bar to actually have been insulting to members, nor did it seem like there was much follow up or explanation or anyone taking responsibility (did any heads roll??).
- Thank you for your continued support for your active duty attorneys. Not all states are as supportive. My only note is the Utah Bar licensing fee is quite high. My employer (USAF) will reimburse me up to \$350. Utah attorneys seem to pay more than my JAG colleagues licensed in other states.
- I am concerned that the bar and the Utah

Supreme Court are continuing to not involve or listen to smaller firms as they make changes regarding regulations, access to justice, changing rules (i.e. the new sandbox approach and LPP's). Those proposing and making the changes in the bar and the Supreme Court appear to be mostly from large firms who do not have boots on the ground experience working with consumers as smaller firm and solo practitioners do. There seems to be a feeling among smaller firms and solo practitioners that they are out of touch with what is happening at that level, are smarter than the attorneys working at that level. Much of the survey assumes the person answering the survey works for a law firm. Several questions weren't applicable, and some of those had no "not applicable" answer.

- I have worked as a lawyer in two states, the practice in Utah is more political and constrained.
- Please note that I am an administrative law judge for the federal government, previously in private practice. That background impacts my answers.
- I grow tired of the incessant emphasis on pro bono legal services. In my experience there are a few who are deserving and grateful but many who act entitled and unappreciative. Paying for legal services helps people understand the true value they are getting. Often when legal services are offered for free or low cost the recipient takes them for granted and develops unrealistic expectations.
- I'm concerned with the Supreme Court's move to allow non lawyers to own law firms. It seems like a good way to worsen the field by allowing people who care much less about ethics rules than lawyers to put pressure on young lawyers to break rules. Businesses will get into the lucrative areas of law practice while doing very little to help the underserved. It seems like a naive bureaucrat's very bad solution that ignores the realities of law practice. The problem probably

needs to be approached in a very different way. I have not seen an article by title addressing the bar's position on this, and that's disappointing.

- The Spring and Summer Bar conventions mostly have no CLE in my area of practice, which is civil trial work with an emphasis on personal and property injury work.
- As an in-house attorney many of the questions did not apply yet there was no option on many of those questions to mark 'not applicable'
- I'd like to see more engagement by Bar Commissioners with the membership.
- Important to increase access to knowledgeable state court staff. If you can manage to get in touch with a human, they often don't know the answer and aren't willing to find out. Not a problem in federal court, but state court is a problem
- This survey seemed to be geared to those that work in law firms. I feel like many things focus on law firms and litigation, and would like to see more inclusion of in-house/gov't and transactional practices.
- Not a fan of the paralegal practitioners. If law school and the bar exam is not necessary to practice law, then the entire premise of the requirements needed to be a lawyer is collapsed.
- In my opinion, the Bar services the Salt Lake area and ignores outlying areas. The Bar conventions are heavy into litigation issues and doesn't provide CLE very often to other disciplines. Attorneys need to receive and report CLE, but my overall, my experience is that CLE is overpriced and the time spent not used effectively. If I can find CLE through other providers I will. Other than managing licensing, I feel that professionally I receive very little benefit from being a member of the Bar. I think the Bar is getting pulled into topics of political correctness rather than trying to be a respected and honorable profession.

- I think the requirement to have in-person CLE should be done away. This requires me to attend CLE that is not relevant at all to my clients and does not serve them. Also, I do not see any added benefit to attend in-person events over online options. CLE should also be more affordable.
- Just as the courts began many years ago to require all court filings to include the email address of the attorney, the Bar should likewise make an email address available on its website for every attorney to facilitate communication between attorneys. Keeping an email private should no longer be an option.
- The regulations regarding lawyer advertising are too broad. There is a small subset of advertising that should have some minimal regulation, but the current regulations have encompassed far too much advertising that would otherwise be acceptable and would have little risk of undue influence on consumers. Loosen the reins.
- The Utah State Bar is not concerned with Justice which is its primary responsibility. The accepted Business Model of Law Practice taught in law schools and pushed by the Utah and other Bar Organizations has reduced a once proud profession to a group of "one call that's all" salesman. It makes me sad to see this having occurred during my almost 50 years in our system of Justice. The Office of Professional Responsibility under its director is a
- a bad joke, singling out small practitioners for punishment while allow large law firms free reign to plunder the public. We have programs that are simply used as eyewash for the public relations spin of the present day bar. Most CLE, the recording of Pro Bono Hours etc. are generally a waste of time. All true professionals keep up on the law in their area of practice and every practicing lawyer does Pro Bono Service daily. The Bar Meetings are just deductible gatherings of the old boys and girls club. This Bar should be

taking the lead in pushing the legislature and the Judiciary in solving problems of declining service to the indigent in criminal After practicing law in the area of estate planning for over 30 years in Utah and watching the impact of referrals and ownership on decision making, I believe it is a HUGE mistake to allow referral fees for referrals or to allow nonlawyers to own law firms because this will cause lawyers to work for their own benefit in referral fees or for the benefit of their owner instead of the benefit of those they represent. It creates an enormous conflict of interest!

- Why was I asked so many questions about my practice after I checked a box saying I'm retired?
- It would be great to work towards more standardization between courts. Filing criminal cases across the state, each court can have its own way of doing things (preferred format for pleadings, classification or type of hearings, availability of media carts for hearings, etc.).
- I work for LexisNexis and do pro bono work. Much of this survey is pretty inapplicable to me.
- I would love to see the Bar recognize that clients of in-house attorneys are better served by increased flexibility of CLE (especially the in-person requirement) and other education standards. I would also very much like to see the option on EVERY email from any Bar section to opt-out of communications. I have not lived in Utah County for many years, and am still fighting with CUBA to get my name off of their list. Same with the Litigation section.
- The selection of judges needs to change. The Bar and the Judicial Selection Committees (of which I have been a part of) is too restrictive of the Governors ability to select good attorneys that are not always liberal leaning.
- Having a live CLE requirement is pretty ridiculous and inconvenient. I don't perceive that there is any additional value that comes from sitting in a room with lawyers while learning

rather than in an office, other than having to block out hours to attend disrupts my practice and increases stress because the emails and phone calls don't stop just so that I can attend a live CLE. Additionally, because I have a multi-jurisdiction practice I utilize a subscription resource that covers my jurisdictions and decreases the cost of CLE overall, but because of Utah's rules I have to incur an additional expense so that I can get "live" hours.

- Generally, I have always been very satisfied with Utah Bar services and capabilities. You run a very good organization, in my view, and I think you for that.
- The Utah bar is ridiculous and should be done away with in its current form.
- Thanks for the USB ongoing effort to provide CLE, to improve ethical professionalism and to increase public awareness and appreciation for the role attorneys play in the quality of life in Utah and the service they provide to the citizens of Utah.
- This survey is heavily weighted toward law firm practice. As in-house counsel for a corporation with 100,000 employees, the questions on advertising, billing practices, etc. are not particularly relevant and my answers should probably be excluded unless there is sufficient granularity in the result presentation to allow them to be removed for the desired demographics.
- I would like to see better organization in the administration of programs at the Utah State Bar.
- The Bar does little to include the criminal prosecution perspective in its publications, trainings, conventions, and other activities. It seems to include the criminal defense perspective fairly regularly. Those results in a feeling of ostracism for prosecutors.

- I find the judges and legal profession to be extremely hostile towards individuals with disabilities. It is palpable, and extremely challenging (as an individual with a disability)
- I plan to get out of the profession. I have been practicing for 30 years. I spent 15 years as a prosecutor in Orange County and have been practicing in Utah for 15 years. I am not a fan of Utah lawyers. I have never seen the amount of dishonesty and pompous jerks in my life. In Orange County, it is about the largest jurisdiction in the country and I could negotiate a life sentence with a hand shake. The lawyers here would drag it out to bill a weeks time to agree if the sun was shining. I find many Utah lawyers pompous and Dishonest. Ie. Which school did you go to. Striving no matter what to get to a higher level. Ie. Partner or judge.
- Many judges I know and appear in front of would never pass muster in California. Yes, I sound like an outsider. But the legal profession in Utah is not good. Best of luck. I plan to cook chickens at Costco rather than continue. I have plenty of money, a pension from Orange County and I'm done.
- The survey is poorly structured for a retired lawyer
- please improve the legal research engine
- make it more friendly user
- The current Utah State Bar President along with the most previous one have both personally reached out to me and have supported my ideas. Colleagues in the bar have been attentive, supportive and caring. The Utahbar.org organization have reached out to me and given me support and shown me incredible kindness. I am beyond proud to be a member of the Utah bar.
- I'm very proud to be a member of the Utah Bar.
- Decrease Bar Dues.
- I am concerned that the current plan to open up ownership of law firms is centered more on

profits than on access to justice. It also ignores the Court's recognition that not all cases need lawyers, like small claims.

- This survey was longer than advertised
- Please don't allow lawyers to be like Brian Wilson the Texas Law Hawk. Watch YouTube for his videos. They're unbelievably ridiculous ads for legal services.
- I believe the Utah Bar should be more concerned about the financial hardships of their own members, rather than nonmembers. I work with many attorneys who do document review at \$23 per hour (no paid holidays, vacation or benefits) and have about 1/3 of their income going to law school loans. The Bar has done nothing to help their members with financial struggles. It appears to only be concerned with helping the finances of the public, expecting us to do pro bono work, and now flooding the already over saturated legal market with paralegals.
- Regarding the question of how my income compared to my expectations, that has changed over my career. For the first ten years, it was far below what I expected. For the last ten years, it has been what I expected or more than I expected.
- The Bar staff and Commission works hard to improve the Profession. I am always impressed with their dedication.
- Have a nice day.
- I'm mostly retired so answers reflect change in the last couple years. Overall, I think the Utah Bar has been great.
- I find CLE to be expensive and often unhelpful. I would like to see less expensive online alternatives
- You asked about the Access to Justice/Gap report, but didn't ask what we thought of it or of efforts to meet the needs. While I applaud and support efforts to improve access to justice, I have a great deal of concern about the proposed (what I perceive to be sweeping) rule changes

that are coming with it. The sandbox is one thing, the wide-sweeping rule changes outside the sandbox another (unless I'm reading the proposed rule changes wrong, in which case it's not crystal clear). As I read them, the proposed rule changes throw wide the doors to sharing fees with non-lawyer employees and encouraging case-runners, which is bad for the profession Anytime race becomes the basis for a hiring or any other decision, that is racism and offensive. Nothing is more maddening than to find out that the only reason you got something was because of the color of your skin.

- Do not raise the price of bar fees please.
- allow continuing legal education to be completed 100 percent online and report continuing legal education online (other states where I am admitted allow this)
- Female attorneys tend to be worse than male attorneys when it comes to professionalism, civility, and courteousness.
- Took way longer than 15 minutes.
- I don't have a problem with the bar or its services, but I feel like it is very defense oriented and somehow adverse to plaintiffs' attorneys. That may not be accurate but it's my general perception. It also feels extremely remote from practitioners outside of the Wasatch Front, sort of like the bar services end in Santaquin.
- No questions about CLE and MCLE. Others' opinions on this topic, the bane of my existence outside the State, would be interesting.
- Don't allow non lawyers to own law firms. Terrible idea and the bar should be leading the opposition instead of cowering to the supremes
- The practice is evolving. Traditional litigation has become too expensive so ADR is being used to settle disputes more frequently.

- Bar dues make membership too expensive for a government lawyer. Further, CLE requirements, particularly live class requirements, are a waste of both time and money when my agency provides targeted CLE to us every year. I am going to join another Bar that better meets my needs.
- The civil bar in Utah is not so civil. The federal criminal bar is amazing, professional, collegial, and supportive of one another. Our federal judges are amazed at how well we get along when compared to other districts. Ask them. Take the Judge Furse debacle. She was my friend. And she was a terrible judge. But nasty civil attorneys and others who had never appeared in front of her said it was about her gender. Bull crap. I sat in her court for 8 years. She never learned. Was awkward and unable to make a decision. I told her that. She knows. Stop pandering to the "me too" "poor me" movement. Pick yourself up by your bootstraps and wear Based on my review of the report, I am not convinced the proposed "sandbox" will increase access to justice. I am also concerned with the lack of transparency with this project, the lack of communication with the bar, and the lack of involvement by other interested stakeholders - including those who may be directly affected by the increased competition from non-lawyers. And because this is one of Justice Himonas' pet projects, many attorneys feel uncomfortable expressing their concerns about it.
- As a specialist in intellectual property, we are a mere 1 percent of attorneys. Few advertising media are useful, and all are expensive in dollars, time, or both. We could, as all small firms perhaps, seriously benefit from some marketing/advertising improvements.
- The Utah Bar is not a necessary part of my practice and is in no way a superior aid to my practice than are other, more affordable or higher quality sources (sources that would be even

more affordable if I could spend the money I spend on bar dues on them). The more I come in contact with the Bar the less I like it. It is out of touch with the needs and wants of honest, decent people.

- Get rid of bigoted Mormon judges if you really want to improve "justice" in Utah courts.
- Please change the CLE rules requiring "live" attendance that has to be in the room. It is prejudicial against useful and topical LIVE CLE events that happen to be telecast, or through webinars, or offered in other locations but can still offer valuable information. The in-person restriction is outdated and sounds like a cottage racket designed to keep the CLE curriculum providers profitable, rather than helping the Utah bar maintain and grow their skill and ethics competency.
- The biggest advance you could make is getting Judges to allow appearances by telephone.
- Criminal lawyers are nice. Civil focused lawyers are all dicks.
- Just don't care
- I am very dissatisfied with the push from our Supreme Court to alter the rules of professional conduct and allow non-lawyers to have ownership interest in legal services. I feel this is being sold under the auspice of providing legal services to those who cannot otherwise afford or obtain them. However, the truth of the matter is, this will only hurt smaller firms and take away a large portion of their work in estate planning, uncontested divorces, business formation, etc. I am very doubtful there will be a commercial enterprise in the so called "regulatory sandbox" that will be interested in providing legal services to indigent tenants in landlord/tenant I would love to see the bar organization shrink and meet simple needs. It seems to continue to grow and I don't need it. More often than not, I get frustrated seeing the regulation of my practice while non-lawyers take more and more of my work and

have no regulation at all.

- It was frustrating to hear the bar aggressively argue that added taxes would limit access to justice when the reality is that very high attorney fees are a much more significant barrier. We looked hypocritical in my view.
- And way too many emails to us about it as well. Felt like a constant, annoying barrage.
- Thank you for the good work you do!
- I am frustrated by the bar's almost exclusive focus on attorneys who work in firms. The questions in this survey are just one more example. There has to be a large number of government attorneys like myself who do not feel that we fit in. One suggestion: work to change the way new attorneys are sworn in. Having one mass ceremony several weeks after bar results are determined may not affect those working in law firms. But for many government attorneys, it means we cannot begin work until several weeks after passing the bar examination. This means several more weeks of trying to figure out how to live without an income.
- I am in private practice. The lawyers all work in public interest law. With the student load debt and the wages, several of the lawyers cannot effort to buy a home, two live with parents with their spouse and children. It is true that many people cannot afford access to justice, well we cannot afford to buy the services that we provide.
- Utah Bar is significantly more expensive than the California Bar and also requires more CLE. Neither provide a return on investment.
- Allowing public companies to own law firms will do nothing to increase access to justice. This concept allows the fox to guard the henhouse without addressing the true problem, which is lack of wage parity and the shrinking middle class.

- Please don't assume that attorneys are all litigators
- How will you determine the scientific validity of this study?
- The last question re: advertising was not well worded, making it difficult to answer
- Keep up the great work, Utah Bar!
- Many of these questions are biased. The questions assume the recipient is a Utah attorney who practices in litigation. Believe it or not, many attorneys do not litigate, do not work for a law firm (or run their own solo practice), never go to court, and do not live in Utah. Whoever designed this survey is clearly a litigator. I expect better inclusiveness from a State Bar organization.
- many of the questions were not relevant to in-house counsel, but no "n/a" type of response was offered
- Do not open the practice of law to non-lawyers without ensuring that they understand the duties of fiduciary relationships. Do not open the practice of law to non-lawyers in a way that will hurt civility and professionalism. Do not make the justice system worse just to broaden access. Granting access without quality control doesn't fix the problem - it just makes the system worse for everybody.
- Increase job opportunities for diverse students.
- According to a recent article by Jason Damm and James E. McNulty, Utah ranks at the bottom with respect to attorney discipline. I ask the Utah State Bar to respond institutionally, either in the Utah Bar Journal or in some other prominent capacity (such as in an email to members), to this article.
- "We consider a relative lack of attorney discipline (AD) to be a measure of corruption, since states with less AD are hampered by a less trustworthy and less predictable legal systems and should experience lower economic growth as a result." Damm, Jason and McNulty, James E., Which States Most Effectively Discipline Attorneys? New Measures of State Corruption Within the United States (May 2, 2019). Available at SSRN: <https://ssrn.com/abstract=3381763> or <http://dx.doi.org/10.2139/ssrn.3381763>.
- My biggest problems in practice are outside UT Bar jurisdiction at the federal level
- Anonymous except you require our name to complete it? Typical bar.
- Bar fees are too high.

Utah State Bar.

TAB 2



Utah's Low Risk Phase

What does it mean and what can you do?



Moving to yellow

Utah's efforts to slow the spread of COVID-19 have been working. Finding a new normal won't be instant, like flipping a switch, it'll be more like gradually moving a dial.

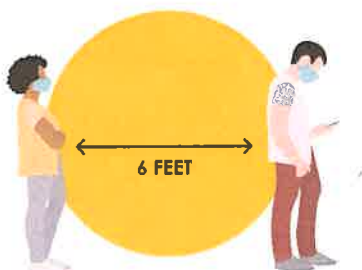
Continue to follow the public health protocols for Low Risk (yellow) to keep the dial moving forward and to prevent it from turning back.

High-risk individuals operate under stricter instructions because they are more likely to suffer severe illness from COVID-19.

General guidelines:



Social gatherings in groups of 50.



Maintain social distancing in public settings.



Face coverings worn when social distancing is difficult to maintain.



Symptom check prior to team sport competitions or practices.



K-12 schools reopening anticipated for 2020/2021 school year.



Pools open with social distancing.



6-foot distance between household groups at events & entertainment venues.



Spacing between household groups, multiple meeting schedules for smaller gatherings and stream services if preferred.



CORONAVIRUS
UTAH.GOV

General guidelines for businesses:



All businesses open and take reasonable precautions.



Dine-in service open with appropriate social distancing and hygiene measures.



Encourage flexible work arrangements, follow hygiene guidelines, and continue social distancing in the workplace.

High-Risk Individuals:

- ✓ Face coverings worn in settings where other social distancing measures are difficult to maintain
- ✓ For any travel, use appropriate precautions; avoid high-risk areas
- ✓ Telework if possible, if not, maintain 6-foot distance
- ✓ When visiting friends or family, wear face coverings when within a 6-foot distance
- ✓ Limit physical interactions with other high-risk individuals, except for members of your household or residence
- ✓ Social interactions in groups of 20 or fewer people outside your household or residence
- ✓ Limit visits to hospitals, nursing homes, or other residential care facilities

Children:

- ✓ Maintain social distancing in public settings
- ✓ All symptomatic children should stay home from childcare, and will be sent home if exhibiting any symptoms
- ✓ Limit child interaction with other children in public spaces (e.g. playground equipment)

Find detailed guidelines for individuals and businesses at Coronavirus.Utah.gov



CORONAVIRUS
UTAH.GOV

COVID-19 EVENT PLANNING TEMPLATE

In accordance with Governor Herbert's Executive Order, event size can exceed 50 individuals if organizational oversight can be provided that ensures guidelines are followed. Formal organizations are required to complete the following event management template to assist their efforts to plan a safe event. This document must be kept and available for inspection by the local health officer or their designee.

Event Details:			
Event Name:			
Event Location:			
	Address	City	Zip
Party Responsible for Organizational Oversight:			
	Address	City	Zip
	Email Address		Phone
Event Dates:			
	Start Date	End Date	
Anticipated Number of Attendees:			
	Per Day Total	Grand Total	
Event Type	<input type="checkbox"/> <u>Static</u> : events where the attendees primarily enter, watch and depart <input type="checkbox"/> <u>Interactive</u> : events where attendees create a traffic flow and interact with each other <input type="checkbox"/> <u>Participant</u> : events where attendees primarily participate in an activity or production <input type="checkbox"/> <u>Community</u> : events with many activities and populations centers and likely a random traffic pattern		
Employees, Volunteers, Players, Performers, Actors, Etc.			
Checklist:	<div> <input type="checkbox"/> Symptom checking symptoms checked (checklist or verbal), including temperature checks when feasible <input type="checkbox"/> Face coverings are worn in settings where other social distancing measures are difficult to maintain <input type="checkbox"/> Ensure that face coverings are available </div> <div> <input type="checkbox"/> Provide accommodations to high-risk employees & volunteers; minimize face-to-face contact, assign tasks that allow these individuals to maintain a 6-foot distance from other employees or customer <input type="checkbox"/> Comply with distancing and hygiene guidelines </div>		

Tracking Attendance:

Must have the ability to track attendance, please describe your plan to track attendance to support contact tracing.

Social Distancing

A 6-foot distance must be maintained between household groups at all times including while seated, limiting the number of people in a confined area to enable adequate distancing at all times, and congregating at any point is not allowed. Please describe your plan to maintain appropriate social distancing throughout the event.

High-Risk Attendees

Set an established window time for high-risk groups to come in without pressure from crowds and/or separate entrances and queues, please describe your plan to accommodate high-risk attendees.

Signage

Maintain signage to remind and help individuals stand or sit at least 6 feet apart, please describe your plan to maintain signage including the number of anticipated signs as well as locations.

Payment Options

Encourage contactless payment; disinfect between transactions at facility stores/gift shops and comply with other retail recommendations, please describe your plan for payment.

Hygiene & Sanitization

Dedicated staff for sanitizing high-touch areas, please describe your plan to provide hygiene and regular sanitization throughout the event.

Concessions

Checklist:

- | | |
|---|---|
| <input type="checkbox"/> Serving and seating protocols consistent with restaurant guidance | <input type="checkbox"/> Encourage contactless payment |
| <input type="checkbox"/> Any concessions/restaurant seating is compliant with restaurant dine-in guidance | <input type="checkbox"/> To the extent reasonable, serve grab-and-go food items |
| | <input type="checkbox"/> Maintain 6-foot distancing for all lines |

Additional Safeguards

Please share any additional planned safeguards or measures being enacted at the event.

Signature

Please provide the signature of the organizational representative that will be responsible for ensuring event oversight.

Printed Name

Title

Signature

Date

TAB 3



UTAH STATE BAR DRAFT BUDGET FY 2020/21

May 27, 2020

Table of Contents

FY21 Budget Narrative	1-5
Revenue by Department	6
Expenses by Department	7
Net Profit (Cost) by Department	8
Top 25 Gross Expense Categories	9
Public Services	10
Member Services	11
Bar Operations	12
Commission/Special Projects Detail	13
Capital Expenditures	14
Projected Cash Reserves	15
Supplemental Schedules (Detailed Department Budgets):	16
Summary by Department	17
Summary by Account	18-20
Licensing	21
Admissions	22-23
New Lawyer Training Program (NLTP)	24
Bar Management	25-26
Facilities	27
OPC	28-29
General Counsel	30
Computer/MIS/Internet	31
CLE	32-33
Summer Convention	34
Fall Forum	35
Spring Convention	36
Bar Journal	37
Committees	38
Member Benefits	39
Section Support	40
Consumer Assistance	41
Access to Justice	42
Tuesday Night Bar	43
Legislative	44
Commission/Special Projects	45
Public Education	46
Young Lawyers Division	47
Licensed Paralegal Practitioners	48

Utah State Bar FY21 Budget Narrative

Overview

The Utah State Bar's operations consist of 24 unique departments. Many of the Bar's departments are regulatory in nature and contain little discretionary income and expenses (e.g., Licensing, Admissions, NLTP, and OPC). Some departments are intended to support themselves (e.g., Admissions, CLE, Summer Convention, Fall Forum, Spring Convention, and Section Support), while others are fully supported by member license fees. Some departments generate income but not enough to support themselves and therefore must also rely on member license fees for support (e.g., Facilities and Bar Journal). MCLE, the Fund for Client Protection, and the 40 Sections are accounted for separately, support themselves, have stand-alone financial statements, and are not factored into the Utah State Bar budget. Below is a summary of each Bar department, its function, how it is funded, and its financial statement category:

Financial Statement Category	Department	Function	Funded By
Licensing	Licensing	Regulatory	License fees
Licensing	Licensed Paralegal Practitioner	Regulatory	License fees
Admissions	Admissions	Regulatory	Self-supporting
New Lawyer Training Program ("NLTP")	NLTP	Regulatory	Self + License fees
Office of Professional Conduct ("OPC")	OPC	Regulatory	License fees
Bar Operations	Bar Management	Management	License fees
Bar Operations	General Counsel	Management	License fees
Bar Operations	Information Technology ("IT")	Management	License fees
Bar Operations	Commission/Special Projects	Management	License fees
Member Services	Bar Journal	Member Service	Self + License fees
Member Services	Member Benefits	Member Service	License fees
Member Services	Section Support	Member Service	Self-supporting
Member Services	Legislative	Member Service	License fees
Member Services	Public Education	Member Service	License fees
Member Services	Young Lawyers Division ("YLD")	Member Service	License fees
Public Services	Committees	Public Service	License fees
Public Services	Consumer Assistance Program	Public Service	License fees
Public Services	Access to Justice	Public Service	Self + License fees
Public Services	Tuesday Night Bar	Public Service	License fees
CLE	Continuing Legal Education ("CLE")	Education	Self-supporting
Summer Convention	Summer Convention	Education	Self-supporting
Fall Forum	Fall Forum	Education	Self-supporting
Spring Convention	Spring Convention	Education	Self-supporting
Facilities	Facilities	Building Usage	Self + License fees

Every income and expense transaction at the Bar is assigned to one of the 24 departments and one of 150 (or so) functional accounts (known as General Ledger accounts or “GL accounts”). The transaction’s department indicates who earned or spent the funds while the functional account reveals what type of income or expense it was. For example, commissioner travel expenses to Spring Convention would be assigned to department “21 – Commission/Special Projects” and GL account “5707 – Travel Commission Mtgs”. Another example is when Bar staff spend time working on the Spring Convention, those expenses are charged to department “12 – Spring Convention”, and GL account “5510 – Salaries/Wages”. By assigning both a department and a functional account to each transaction, we are able to classify all income and expenses to produce income statements by department and by functional account (which is required for external and IRS reporting).

One drawback to our current accounting that may cause confusion is that it is difficult to track programs that span multiple departments and accounts. For example, spending on the Licensed Lawyer program spans the IT, General Counsel, Access to Justice, Public Education, and Commission/Special Projects departments. Some of the costs related to software development have been capitalized while others are expensed as they are incurred (PR, advertising, and trademark expenses). As a result, it is not always apparent what is spent on which projects at a detailed level. The following budget schedules attempt to give more visibility into program spending while also being consistent with financial statement presentation.

For FY21 budgeting purposes, in an effort to be intentional and strategic about the investments the Bar is making in its various programs, the focus is on those departments that contain the majority of the Bar’s discretionary spending. As such, the main areas of focus will be Public Services, Member Services and Bar Operations. The three conventions, CLE, and Section Support have all been budgeted to break even (plus or minus \$20,000). Admissions is intended to support itself and break even, however, given the declining number of applicants to the Bar, its revenue is no longer sufficient to cover its expenses, and a roughly \$104,000 loss is budgeted.

As a general note, the Bar has been able to add new programs while maintaining existing programs over the last several years mainly due to a steady small increases in licensing revenue each year. Out of the last nine fiscal years, eight years have generated a net profit adding to the Bar’s reserves. However, it is anticipated based on historical trends that expense growth will outpace revenue growth at which time it will be necessary to dip into operating reserves and consider pursuing a license fee increase. As such, it is important that the Bar be strategic and intentional with regard to its spending, especially as it relates to discretionary programs.

Key Changes

Built into the FY21 draft budget are the following key changes compared to FY20:

	Anticipated Change vs. FY2020
Licensing revenue (except late fees)	+0.0%
Admissions revenue	+0.0%
Salaries	+0.0%
Health insurance	+5.0%
Dental insurance	+5.0%
Building expenses (utilities, etc.)	+3.0%
Insurance expenses (liability, D&O, etc.)	+3.0%
Computer maintenance expenses	+3.0%

Revenue Projections:

As a result of the current global pandemic and the anticipated economic downturn, the Bar has cancelled the annual Summer Convention that occurs in July each year and has also waived late fees for the annual licensing period until November 1, 2020. As such, as pulled from the Budget, this revenue comparison shows the decrease in registration revenues and sponsor/vendor revenue related to the Summer Convention and the assumption that no late fees will be collected. In addition to the items discussed above, under the current grant agreement with the Utah Bar Foundation, the Bar will receive \$37,000 in grant proceeds, which is approximately \$21,000 less than last year.

The following table shows the largest decreases in revenue for FY21 compared to projected revenue of FY20:

Utah State Bar Income Differences from Projections Comparing FY2021 to projected 2020

	Actual FY 2018	Actual FY 2019	Budget FY 2020	Projected FY 2020	Draft Budget FY 2021	Variance 21 Budget vs. 2019 Actual
Revenue						
4096 · Late Fees	\$ 96,850	\$ 62,330	\$ 63,033	\$ 90,000	\$ -	\$ (90,000)
4051 · Meeting - Registration	404,028	399,950	386,000	255,163	170,178	(84,985)
4120 · Grant Income	-	55,219	-	58,219	36,812	(21,407)
4052 · Meeting - Sponsor Rev	54,150	62,140	57,290	41,550	37,050	(4,500)
4055 · Meeting - Sp Ev Reg	16,856	17,377	17,500	7,075	3,775	(3,300)
4053 · Meeting - Vendor Rev	32,850	27,150	24,600	16,750	13,950	(2,800)
	\$782,234	\$793,666	\$716,673	\$650,557	\$443,565	\$(194,692)

Cost Savings:

The Bar's typical budget in years past, has allowed for merit and/or cost of living (COLA) increases to employees' salaries and wages and the Bar's contribution to the 401(k) of 10%. However, for FY21, the budget does not reflect those increases. The current year budget assumed flat salaries and wages for the upcoming fiscal year noting that budgeted salary expenses that are slightly higher than last year are the result of staff growth and not increases related to merit or COLA raises. The table below, which are amounts pulled directly from the current year Budget, shows in the far-right column highlighted in light yellow, the amount that would be added to the FY21 Budget had a 3% COLA adjustment been included.

Utah State Bar Salary and Wages Cost of an added COLA Adjustment into FY21 budget

	Actual FY 2018	Actual FY 2019	Budget FY 2020	Projected FY 2020	Draft Budget FY 2021	3% COLA adj. had raises been included FY 21
Expenses						
Program Services						
5510 · Salaries/Wages	\$2,621,442	\$2,765,253	\$2,919,323	\$2,913,794	\$2,985,935	\$ 89,578
5605 · Payroll Taxes	196,232	206,499	215,725	218,640	225,453	6,764
5650 · Retire. Contrib.	235,389	231,773	242,704	251,964	269,045	8,071
	\$3,053,063	\$3,203,525	\$3,377,752	\$3,384,399	\$3,480,434	\$ 104,413

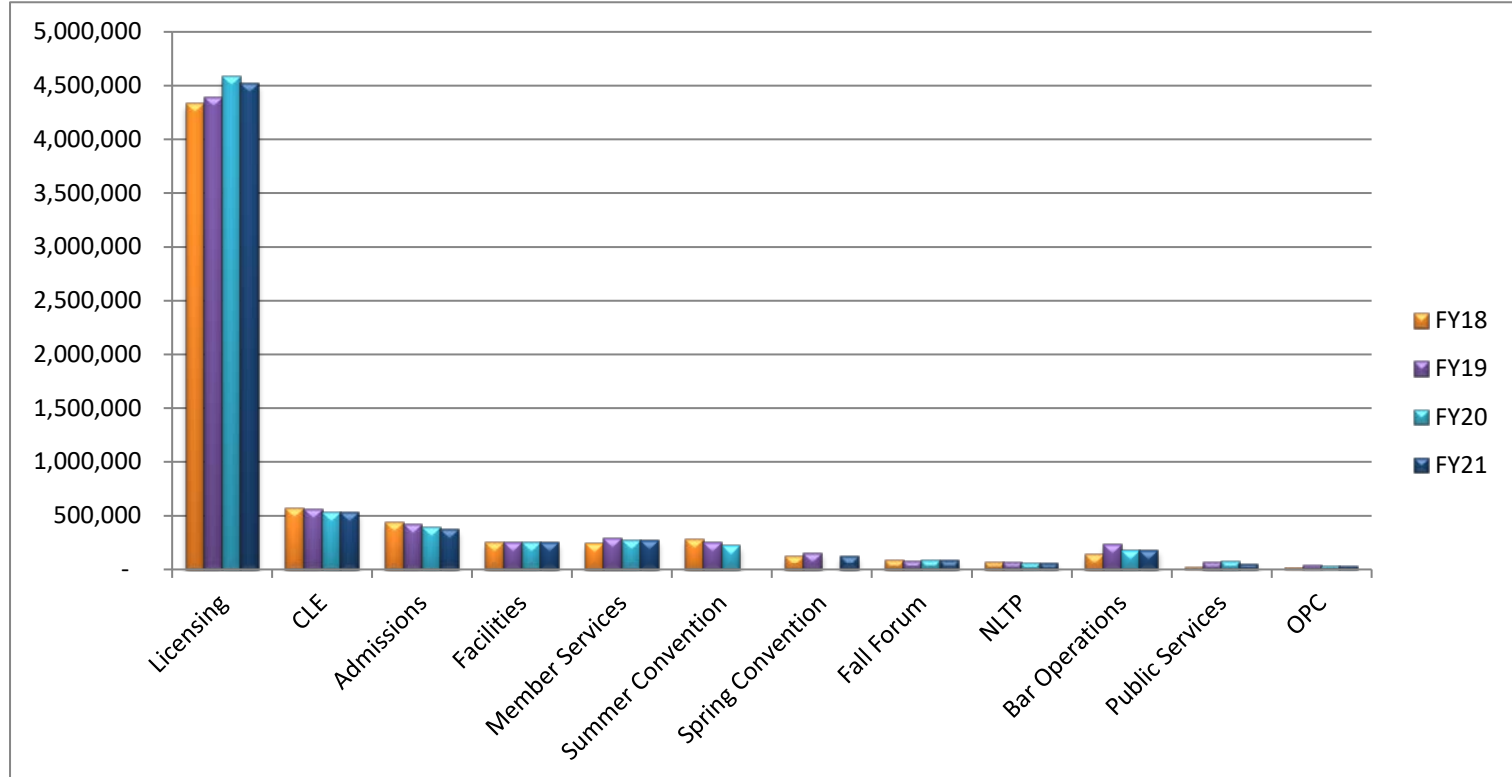
As a result of the current global pandemic and the anticipated economic downturn, the Bar has identified certain expenses that can be eliminated to help offset decreases in revenue. The following table shows, by account type, anticipated FY21 savings compared to projected FY20 expenses.

Utah State Bar Expenses Differences from Projections Comparing FY2021 to projected 2020

	Actual FY 2018	Actual FY 2019	Budget FY 2020	Projected FY 2020	Draft Budget FY 2021	Variance 21 Budget vs. 2019 Actual
Expenses						
5075 · Food & Bev-external	\$508,871	\$469,643	\$452,082	\$476,465	\$357,568	\$(118,897)
7105 · Advertising	48,203	54,435	106,318	73,780	11,850	(61,930)
5867 · Membership Survey	-	-	50,000	50,000	-	(50,000)
5868 · UCLI Support	-	-	50,000	50,000	-	(50,000)
7115 · Public Relations	50,280	-	50,000	50,000	-	(50,000)
5063 · Special Event Expense	84,047	82,330	89,750	61,680	24,843	(36,838)
5702 · Travel - Lodging	56,913	60,715	55,147	69,254	33,764	(35,490)
7177 · UPL	1,139	8,302	3,960	41,141	10,000	(31,141)
5070 · Equipment Rental	47,536	41,896	44,756	44,756	39,167	(29,148)
5703 · Travel – Trans/Park	16,400	20,818	19,672	19,672	5,399	(23,844)
5810 · ABA Mid Year Mtg.	23,465	12,735	19,930	23,791	-	(23,791)
5865 · Retreat	37,428	31,293	30,000	25,118	5,000	(20,118)
5815 · Commission/Edu	24,783	26,473	25,423	22,030	2,350	(19,680)
5830 · W. States Bar Conf.	13,659	29,064	17,146	15,556	-	(15,556)
5805 · ABA Annual Meeting	21,806	19,714	23,727	15,308	-	(15,308)
5707 · Travel - Comm. Mtgs	39,386	54,493	39,202	16,477	2,500	(13,977)
5850 · Leadership Academy	12,400	12,471	20,000	20,000	10,000	(10,000)
5820 · ABA Annual Delegate	16,284	10,281	11,938	9,282	-	(9,282)
7176 · Bar Litigation	22,356	6,374	25,000	17,582	10,000	(7,582)
5660 · Training/Development	19,226	21,559	27,785	21,734	14,556	(7,178)
5704 · Travel - Mile Reimb.	12,585	17,682	13,433	8,849	3,625	(5,224)
5061 · LRE - Bar Support	65,000	65,000	65,000	65,000	60,000	(5,000)
5845 · Reg Reform Task Force	-	6,012	10,000	4,671	-	(4,671)
5705 · Travel - Per Diems	6,131	4,949	4,523	5,420	790	(4,631)
5706 · Travel - Meals	1,479	1,542	958	1,024	-	(1,024)
5855 · Bar Review	2,416	1,729	1,500	931	-	(931)
	\$1,131,793	\$1,059,508	\$1,257,250	\$1,242,652	\$591,410	\$(651,241)

**Utah State Bar
FY21 Final Budget
Revenue by Department**

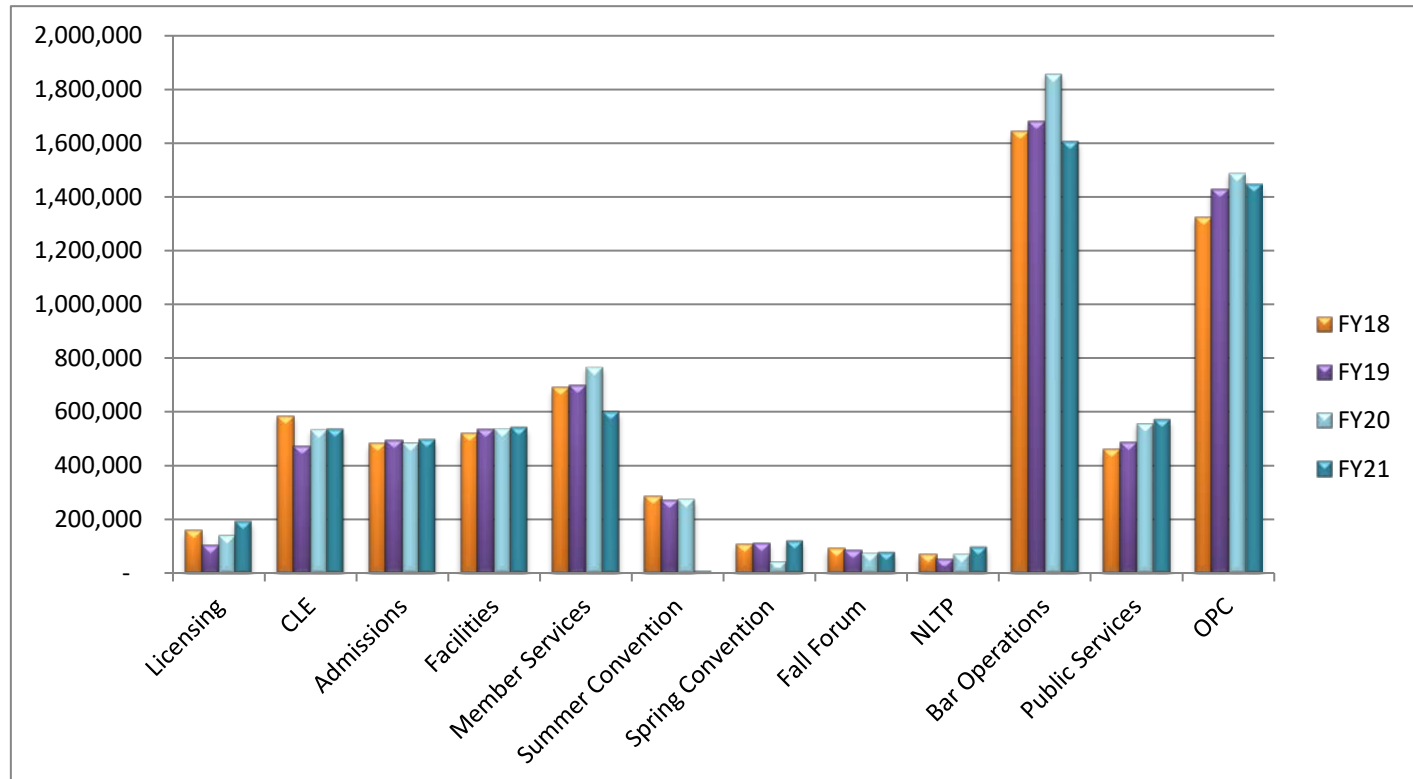
Revenue	Actual FY18	Actual FY19	Projected FY20	Budget FY21	% of Total	Trend
Licensing	4,334,919	4,391,838	4,581,512	4,515,112	64.6%	
CLE	565,080	561,306	528,039	528,039	8.3%	
Admissions	434,620	416,220	396,010	372,410	6.1%	
Facilities	248,542	250,639	251,228	251,228	3.7%	
Member Services	243,437	289,921	273,695	271,209	4.3%	
Summer Convention	283,280	250,465	218,585	-	3.7%	
Spring Convention	123,526	154,252	-	123,000	2.3%	
Fall Forum	83,328	78,760	79,903	79,903	1.2%	
NLTP	62,017	66,349	59,149	59,149	1.0%	
Bar Operations	136,052	237,287	181,053	179,141	3.5%	
Public Services	14,323	68,654	72,962	51,556	1.0%	
OPC	21,288	33,333	26,406	29,187	0.5%	
Total	6,550,412	6,799,024	6,668,543	6,459,934	100.0%	



This table and chart shows the Bar's trended revenue by financial statement category. More than 64% of the Bar's income comes from member license fees. The next largest category of income is from CLE events, then Admissions. These three functions account for 80% of the Bar's income. We are not projecting any changes to licensing fees in FY21 compared to FY20, due to slowing we are seeing in the economy. CLE revenue is expected to remain consistent with levels from recent prior years. Because we have seen a slowdown in Admissions revenue due to a declining number of applicants, we are not projecting any change in Admissions revenue in FY21.

**Utah State Bar
FY21 Final Budget
Expenses by Department**

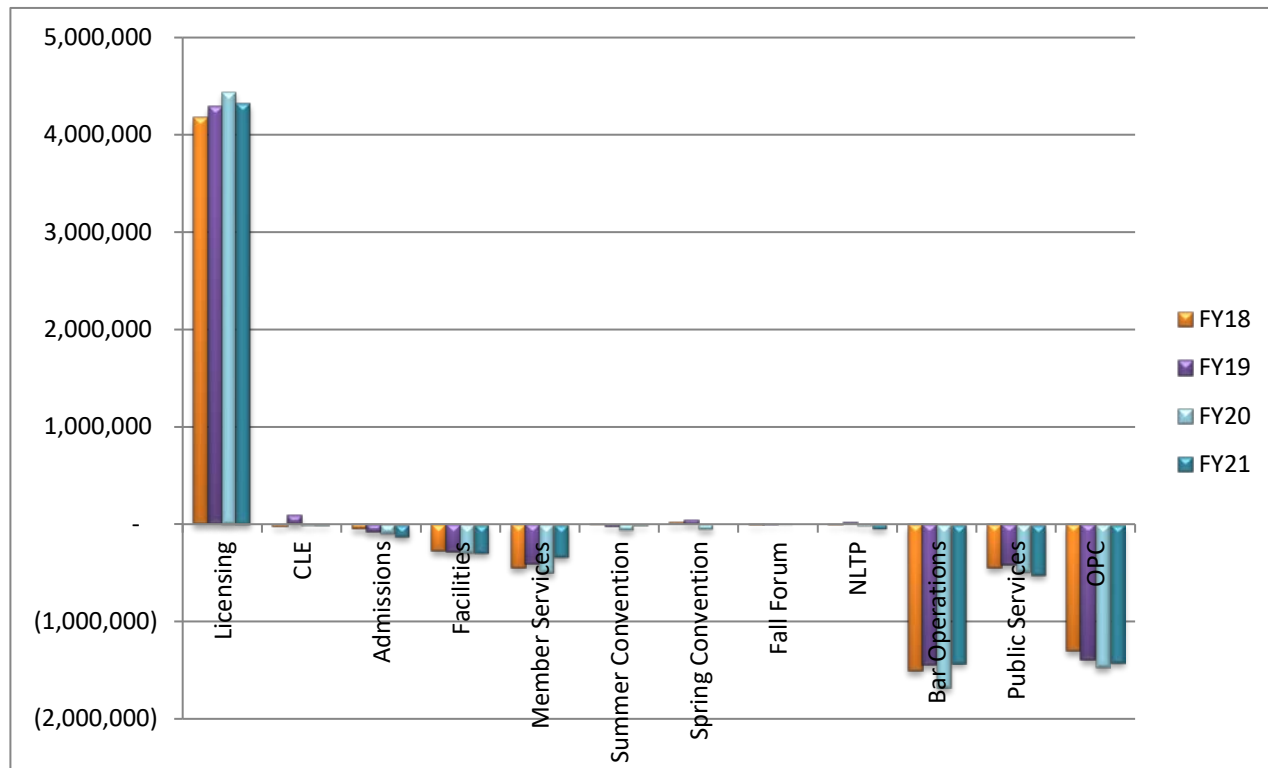
Expenses	Actual FY18	Actual FY19	Projected FY20	Budget FY21	% of Total	Trend
Licensing	157,183	101,711	142,846	195,362	3.1%	
CLE	585,023	472,253	537,465	538,144	8.5%	
Admissions	481,022	494,776	488,517	499,728	7.9%	
Facilities	519,194	533,973	540,435	544,840	8.6%	
Member Services	691,170	699,119	770,185	603,854	9.5%	
Summer Convention	284,030	270,280	276,967	9,723	0.2%	
Spring Convention	107,920	112,155	44,615	123,000	1.9%	
Fall Forum	90,989	84,217	76,257	79,903	1.3%	
NLTP	67,839	51,595	72,458	100,252	1.6%	
Bar Operations	1,643,439	1,681,015	1,857,464	1,607,269	25.4%	
Public Services	459,425	485,546	559,461	573,863	9.1%	
OPC	1,323,817	1,425,811	1,489,289	1,449,269	22.9%	
Total	6,411,052	6,412,452	6,855,960	6,325,207	100.0%	



This table and chart shows the Bar's trended expenses by financial statement category. OPC and Bar Operations account for nearly half of the Bar's total expenses, and a large majority of those expenses are staff-related. Most departments' expenses are on the rise due to the projected increase in staff expenses, building expenses and insurance.



























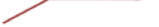
Utah State Bar
FY21 Final Budget
Net Profit (Cost) by Department

Net profit (cost)	Actual FY18	Actual FY19	Projected FY20	Budget FY21	Trend
Licensing	4,177,736	4,290,127	4,438,666	4,319,750	
CLE	(19,942)	89,053	(9,426)	(10,105)	
Admissions	(46,402)	(78,556)	(92,507)	(127,318)	
Facilities	(270,652)	(283,334)	(289,207)	(293,612)	
Member Services	(447,733)	(409,198)	(496,491)	(332,646)	
Summer Convention	(750)	(19,815)	(58,382)	(9,723)	
Spring Convention	15,606	42,097	(44,615)	(0)	
Fall Forum	(7,662)	(5,457)	3,646	0	
NLTP	(5,822)	14,754	(13,309)	(41,103)	
Bar Operations	(1,507,387)	(1,443,728)	(1,676,411)	(1,428,128)	
Public Services	(445,103)	(416,892)	(486,498)	(522,308)	
OPC	(1,302,529)	(1,392,478)	(1,462,883)	(1,420,082)	
Total	139,359	386,573	(187,417)	134,727	



This table and chart shows the Bar's trended net profit (cost) by financial statement category. Colored bars rising above the x-axis depict net profit, while colored bars falling below show net cost. Those functions that have barely visible colored bars are those functions that are intended to support themselves and break even.

**Utah State Bar
FY21 Final Budget
Top 25 Gross Expense Categories (Based on Projected FY20)**

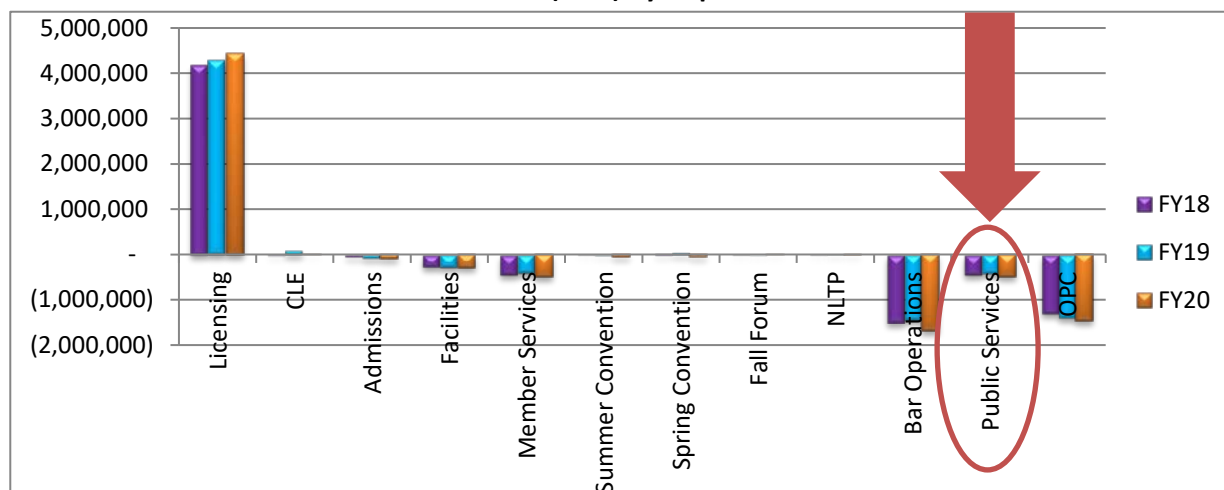
Top 25 Expense Categories	Actual FY19	Actual FY18	Projected FY20	Budget FY21		Trend
Salaries & Benefits	3,540,057	3,368,217	3,857,927	3,857,927	61.59%	
Food & Beverage Expenses	547,784	587,127	444,780	444,780	7.10%	
Depreciation	241,734	243,588	214,984	214,984	3.43%	
Building Overhead	211,111	205,553	212,856	212,856	3.40%	
Copy/Printing Expense	126,718	139,012	128,432	128,432	2.05%	
Meeting Room Expenses	142,973	157,312	54,259	127,941	0.87%	
Outside Consultants	74,541	107,887	118,699	118,699	1.89%	
Bar Exam Expenses	67,368	104,047	98,150	98,150	1.57%	
Other Misc Expense	46,743	9,068	80,170	80,170	1.28%	
Blomquist Hale	73,832	73,946	73,721	73,721	1.18%	
Insurance Expense	68,765	67,438	70,387	70,387	1.12%	
Telecommunications Expense	67,736	68,379	68,652	68,652	1.10%	
Legislative Expenses	47,615	44,126	60,000	60,000	0.96%	
LRE Support	65,000	65,000	60,000	60,000	0.96%	
Computer Maintenance	48,627	28,232	59,647	59,647	0.95%	
Postage/Mailing Expense	53,924	60,459	52,676	52,676	0.84%	
Casemaker	72,584	71,313	52,250	52,250	0.83%	
Database Expense	28,437	51,734	47,133	47,133	0.75%	
Office/Meeting Supplies	49,069	43,388	45,930	45,930	0.73%	
3rd Party Revenue Sharing	42,191	64,158	44,158	44,158	0.70%	
Credit Card Fees	50,956	52,253	43,909	43,909	0.70%	
Travel	160,198	132,894	43,577	43,577	0.70%	
Speaker Expenses	25,242	49,667	35,348	35,348	0.56%	
BJ Commission Expense	33,339	28,655	35,172	35,172	0.56%	
MCLE Fees	38,718	44,311	34,507	34,507	0.55%	
Other	487,189	543,289	226,905	226,905	3.62%	
Grand Total	6,412,452	6,411,052	6,264,229	6,337,911	100.0%	

Instead of breaking down expenses based on department, this table categorizes them based on functional expense account across all departments. It reveals the top twenty-five accounts that make up more than 96% of the Bar's spending. Notably, the single largest expense type that accounts for over half of the Bar's spending is staff-related (salaries and benefits). The next largest expense category is food & beverage expenses which account for almost 7% of the Bar's spending. Approximately 85% of food & beverage expenses are related to conventions and CLE events and are recouped through attendee registration fees. The expenses in the "Other" category are individually less than \$35,000 annually, or 0.6% of total expenses.

Utah State Bar FY21 Final Budget Public Services

	Actual FY18	Actual FY19	Projected FY20
Program Net Cost			
Consumer Assistance Program (1 FTE)	130,618	129,886	136,498
Access to Justice (3 FTEs)	161,515	117,057	160,186
Tuesday Night Bar	36,695	34,373	38,328
LRE Contribution	65,000	65,000	65,000
UDR Contribution	-	-	-
Law Day	8,629	4,452	1,300
Staff time & other expenses associated with Committees	42,645	66,123	85,185
Public Service Programs Net Cost	445,103	416,892	486,498
Other Public Service Expenses Classified Elsewhere:			
In Kind Contributions to UDR, LRE, UCLI and other NFPs	20,517	20,004	21,571
Serving Our Seniors - YLD (estimated)	1,145	1,000	1,000
Wills for Heroes - YLD (estimated)	1,100	1,000	1,000
Other YLD Public Service Projects	6,078	5,767	10,750
Licensed Lawyer (some capitalized)	27,645	60,600	60,600
Expungement Day Clinic grant	3,000	-	-
Total Other Public Service Expenses	59,485	88,371	94,921
Public Services Net Cost	504,588	505,263	581,419

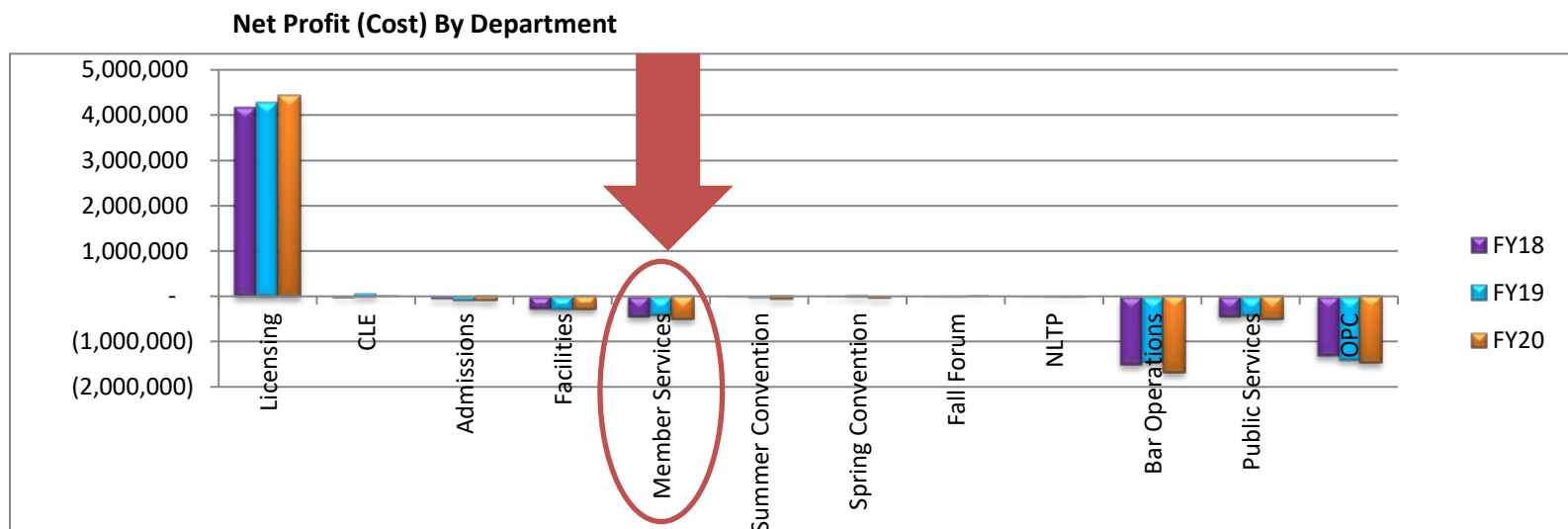
Net Profit (Cost) By Department



The above table shows the breakdown of Public Service expenses by program. The bar chart below the table depicts the net profit (cost) of each of the Bar's major functions and is presented to show how Public Services fits into the Bar's overall operations from a cost perspective. While it represents roughly 8% of the Bar's total expenses, it includes many of the Bar's discretionary programs and expenses. It should be noted that the majority of expenses in the Consumer Assistance Program, Access to Justice and Tuesday Night Bar departments are staff-related, so there are fewer discretionary spending decisions short of making staffing changes.

**Utah State Bar
FY21 Final Budget
Member Services**

	Actual	Actual	Projected	Draft
	FY18	FY19	FY20	Budget
Program Net Cost				
Bar Journal (0.5 FTE)	23,308	(8,890)	14,542	14,732
Blomquist Hale	73,946	73,832	73,721	73,721
Casemaker	71,313	72,584	57,418	52,250
Section Support (1 FTE)	1,328	2,530	(8,795)	(7,805)
Legislative	53,283	67,182	72,634	73,648
Public Education (1 FTE)	166,246	156,577	228,070	104,966
Young Lawyers Division	54,238	50,659	59,889	22,122
Staff time & other expenses associated with Member Benefits	4,071	(5,276)	(987)	(987)
Member Service Programs Net Cost	447,733	409,198	496,491	332,646
Other Member Services Expenses Classified Elsewhere:		6,012		
Leadership Academy	12,400	12,471	20,000	10,000
Bar Review	2,219	1,729	931	-
Bar Anniversary	-	31,293	-	-
Practice Portal (some capitalized)	24,765	120	-	-
Total Other Member Service Expenses	39,384	-	20,931	10,000
Member Services Net Cost	487,118	409,198	517,421	342,646

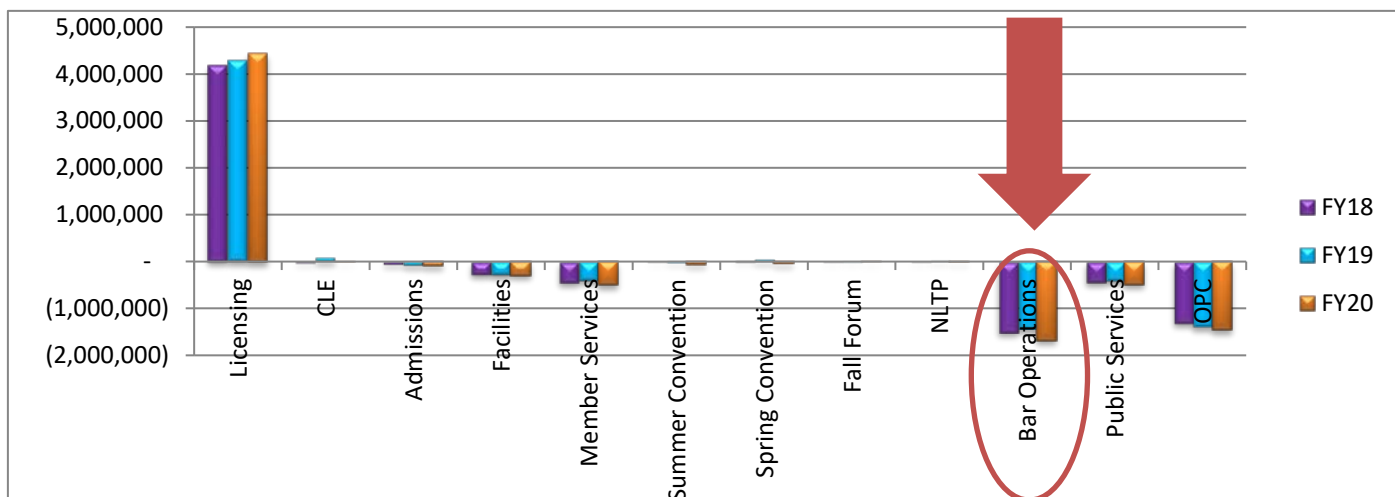


The above table shows the breakdown of Member Service expenses by program. The bar chart below the table depicts the net profit (cost) of each of the Bar's major functions and is presented to show how Member Services fits into the Bar's overall operations from a cost perspective. While it represents roughly 8% of the Bar's total expenses, it includes many of the Bar's

**Utah State Bar
FY21 Final Budget
Bar Operations**

	Actual	Actual	Projected	Draft
Program Net Cost	FY18	FY19	FY20	Budget
Bar Management (5 FTEs)	682,600	605,388	689,912	698,277
General Counsel (2.3 FTEs)	302,876	291,705	351,820	335,393
IT (2 FTEs)	304,039	308,115	323,731	314,907
Commission/Special Projects	238,977	238,520	310,947	79,551
Bar Operations, net cost	1,528,492	1,443,728	1,676,411	1,428,128

Net Profit (Cost) By Department



Bar Operations is comprised of Bar Management, General Counsel, IT and Commission/Special Projects. The majority of spending in Bar Management, General Counsel and IT is staff-related. Other non-discretionary expense items in those departments include the annual audit expense (~\$34,000), outside legal counsel for UPL and Bar litigation (~\$20,000), and outside technology support. A detail of spending in Commission/Special Projects follows on a subsequent schedule.

**Utah State Bar
Commission/Special Projects Spending Detail
Through 3/31/20**

Sum of Amount Row Labels	First 9 Months					Projected FY20	Budget FY21
	FY16	FY17	FY18	FY19	FY20		
85th Anniversary	15,782						
AAA Program (database modifications)	975						
ABA review	5,984						
Annual Report	465		475				
Awards	566	1,448	1,223	2,201	2,537	2,685	2,685
Bar Review	1,465	830	2,219	1,229	431	931	
Books from Barristers	-51	-14					
Breakfast of Champions	780	-387					
Commission Convention/CLE Registration Fees	7,851	21,611	21,765	17,250	15,100	20,530	2,350
Commission Gifts	8,223	1,886	4,303	797	1,517	1,686	1,686
Commission Meeting Expenses	1,436	1,263	2,166	2,618	485	2,000	2,000
Commission Meeting Food & Beverage	15,559	23,107	29,158	12,377	15,012	24,921	10,000
Commission Meeting Room Rental	6,294	7,423	5,297	3,232	3,345	4,710	4,710
Commission Photo	571	761	614	625	596	700	700
Commission Stationery	4,377	2,343	2,922	1,743	2,941	3,000	3,000
Copies	399	2,029	541	191	723	800	800
E&O Insurance	3,000	4,797	5,112	3,969	3,969	5,292	5,292
eBulletin	756	78	125				
Election Expense	3,250	3,250	3,256	1,905	2,700	2,699	2,699
Futures Commission	2,148						
Leadership Academy	6,598	11,871	12,505	11,327	11,645	20,000	10,000
Licensed Lawyer	2,948	868					
Licensed Paralegal Practitioner	62						
Magna Carta Event	20						
Member Portal		917					
Member Survey					4,000	50,000	
Misc Technology Expense		527					
Office Supplies			377	161			
Past Presidents Book	5,803						
Past Presidents Lunch	391	1,874					
Postage/Mailing/Communications	233	801	60	196	1,713	2,000	2,000
Pres/Pres-Elect Monthly "Stipend"	17,250	18,000	18,000	14,000	20,852	20,000	20,000
President's expense	3,120	1,118	3,936	2,231	2,899	9,099	2,154
Reg Reform Task Force				5,912	4,571	4,671	
Retreat	29,840	21,080	35,009	31,293	20,089	20,118	5,000
Sponsorship	8,000	3,225	1,600	2,170	1,000	1,000	1,000
Staff	8,042	8,140	1,743	679	782	975	975
Travel - ABA Delegates	8,541	10,743	15,784	7,214	6,387	7,516	
Travel - ABA Meetings	10,363	15,865	13,624	7,948	11,651	10,443	
Travel - Commission Mtgs	3,293	2,894	2,801	2,077	1,636	15,833	2,500
Travel - Jackrabbit Bar	1,184	1,336					
Travel - Northwestern Bar Conf	979		2,538				
Travel - Other			1,006	74	2,533	5,454	
Travel - Spring Convention	13,599	11,788	10,033	8,748	854	854	
Travel - Summer Convention	23,388	36,355	33,667	42,986	18,290	10,030	
Travel - Western States Bar Conf	2,785	14,058	6,076	7,422	5,130	13,000	
UCLI - Utah Center for Legal Inclusion			253	216	50,000	50,000	
Website		6,000					
Wipfli review		24,643					
Grand Total	226,765	263,756	238,977	192,721	213,390	310,947	79,551

Utah State Bar
Final FY2020 Budget
Capital Expenditures

Category	FY14	FY15	FY16	FY17	FY18	FY19	Projected FY20	Budget FY21	Total
Office furniture & fixtures	26,002	3,433	-	1,483	9,355	-	2,395	2,000	71,601
Meeting room furniture & fixtures	-	-	-	-	-	-			40,740
Office equipment (copiers, phones, fax, projectors, mail machine, etc)	10,472	-	-	63,752	669	3,050	8,200	4,000	142,217
Building improvements	361,966	6,365	-	2,721	21,006	33,100	-	-	751,126
Computer equipment/servers/software	61,770	21,721	14,913	22,600	84,903	110,000	31,650	4,000	362,066
OPC database software (New Dawn/Journal Technologies)	32,227	100,224							132,451
Membership database (Euclid - ClearVantage)	274,181	50,966	7,020						332,167
Admissions database (Box Lake Networks - Synergy)	45,000								45,000
Pro Bono database (Euclid)		32,020	31,600						63,620
Licensed Lawyer (Euclid)			49,545	4,427					53,972
New Website (EKR)				18,950					18,950
Practice Portal (Euclid)				23,100				-	23,100
Certificate of Good Standing (COGS)							-		-
Total	811,618	214,729	103,078	137,033	115,933	146,150	42,245	10,000	2,037,010

Annual Maintenance Contracts (expensed over maintenance period):	FY14	FY15	FY16	FY17	FY18	FY19	Projected FY20	Budget FY21	Total
ClearVantage Annual Maintenance (Euclid)			25,160	26,360	26,360	26,360	27,678	28,000	131,918
Licensed Lawyer Annual Hosting Fee (Euclid)				6,600	6,600	6,600	6,600	6,600	26,400
Journal Technologies Annual Maintenance		6,211	6,521	6,848	7,190	8,267			35,037
Synergy (Box Lake Networks) Admissions Database Annual Maintenance		3,900	3,900	3,900	3,900				15,600
BrainTrace						32,400	34,817	36,000	67,217
NLTP Database, Annual Hosting Xinspine						-	9,750	10,750	
FastCase (Replaced Casemaker)						-	43,542	52,250	
Block Hours - prepaid (Euclid)						16,500	40,000	40,000	
Total		10,111	35,581	43,708	44,050	41,227	34,278	34,600	208,955

This table shows capital expenditures by general category over the last six years. Capital expenditures include spending on assets that cost \$500 or more and have a useful life of at least three years. Once purchased these assets are depreciated ratably over their useful lives. A significant portion of the Bar's capital expenditures over the last few years have been on software and building improvements (the new HVAC system). That trend will likely continue into FY20. Most purchased software also requires annual maintenance contacts (shown in the second table) which are expensed over the period of the contract. These maintenance contracts are generally ongoing for as long as the software is in use.

**Utah State Bar
Final FY2020 Budget
Projected Cash Reserves**

Projected Cash Reserves, 6/30/20	\$ 3,220,013
Add: FY20 budgeted change in cash	339,711
Projected Cash Reserves, 6/30/20	<u>3,559,724</u>
Board Designated Reserves:	
Operations Reserve (3 months' operations)	1,581,302
Capital Replacement Reserve - Equipment	200,000
Capital Replacement Reserve - Building	650,000
Total Board Designated Reserves	<u>2,431,302</u>
Excess Cash Reserves over Board Designated & Contingency Reserves	<u>\$ 1,128,422</u>

SUPPLEMENTAL SCHEDULES

Utah State Bar
Final FY2021 Budget - Summary by Department
Based on Actual Results through 3/31/20

	Actual FY 2018	Actual FY 2019	Projected FY 2020	Draft Budget FY 2021	\$ Change 2020 Projected vs 2021 Budget	% Change 2020 Projected vs 2021 Budget
Revenue						
Licensing	4,334,919	4,391,838	4,581,512	4,515,112	(66,400)	-1%
Admissions	434,620	416,220	396,010	372,410	(23,600)	-6%
NLTP	62,017	66,349	59,149	59,149	-	0%
OPC	21,288	33,333	26,406	29,187	2,781	11%
CLE	565,080	561,306	528,039	528,039	-	0%
Summer Convention	283,280	250,465	218,585	-	(218,585)	-100%
Fall Forum	83,328	78,760	79,903	79,903	-	0%
Spring Convention	123,526	154,252	-	123,000	123,000	#DIV/0!
Member Services	243,437	289,921	273,695	271,209	(2,486)	-1%
Public Services	14,323	68,654	72,962	51,556	(21,407)	-29%
Bar Operations	136,052	237,287	181,053	179,141	(1,912)	-1%
Facilities	248,542	250,639	251,228	251,228	-	0%
Total Revenue	6,550,412	6,799,024	6,668,543	6,459,934	(208,609)	-3%
Expenses						
Licensing	157,183	101,711	142,846	195,362	52,515	37%
Admissions	481,022	494,776	488,517	499,728	11,210	2%
NLTP	67,839	51,595	72,458	100,252	27,794	38%
OPC	1,323,817	1,425,811	1,489,289	1,449,269	(40,020)	-3%
CLE	585,023	472,253	537,465	538,144	679	0%
Summer Convention	284,030	270,280	276,967	9,723	(267,244)	-96%
Fall Forum	90,989	84,217	76,257	79,903	3,646	5%
Spring Convention	107,920	112,155	44,615	123,000	78,385	176%
Member Services	691,170	699,119	770,185	603,854	(166,331)	-22%
Public Services	459,425	485,546	559,461	573,863	14,403	3%
Bar Operations	1,643,439	1,681,015	1,857,464	1,607,269	(250,196)	-13%
Facilities	519,194	533,973	540,435	544,840	4,405	1%
Total Expenses	6,411,052	6,412,452	6,855,960	6,325,207	(530,753)	-8%
Other						
Gain (Loss) on Disposal of Assets			-	-	-	-
Net Profit (Loss)	\$ 139,359	\$ 386,573	\$ (187,417)	\$ 134,727	\$ 322,144	-172%
Depreciation	243,588	241,734	214,984	214,984	-	0%
Cash increase (decrease) from operations	382,948	628,307	27,567	349,711	322,144	1169%
Changes in operating assets/liabilities	452,669	512,135	15,000	20,000	5,000	33%
Capital expenditures	(115,933)	(146,150)	(42,245)	(10,000)	32,245	-76%
Net change in cash	\$ 719,684	\$ 994,292	\$ 322	\$ 359,711	\$ 359,389	111591%

(1) Member Services is comprised of Bar Journal, Member Benefits, Section Support, Legislative, Public Education and Young Lawyers Division

(2) Public Services is comprised of Committees, Consumer Assistance, Access to Justice, and Tuesday Night Bar

(3) Bar Operations is comprised of Bar Management, General Counsel, IT, and Commission/Sp Projects

Utah State Bar
Final FY2020 Budget - Summary by Account
Based on Actual Results through 3/31/20

	Actual FY 2018	Actual FY 2019	Projected FY 2020	Draft Budget FY 2021	\$ Change 2020 Projected vs 2021 Budget	% Change 2020 Projected vs 2021 Budget
Revenue						
4001 · Admissions - Student Exam Fees	\$ 130,025	\$ 124,025	\$ 135,575	\$ 135,575	\$ -	0%
4002 · Admissions - Attorney Exam Fees	47,475	45,475	46,225	46,225	-	0%
4003 · Admissions - Retake Fees	41,225	41,250	22,850	22,850	-	0%
4004 · Admissions - Laptop Fees	55,400	51,900	47,700	47,700	-	0%
4005 · Admissions - Application Forms	-	4,000	5,000	5,000	-	0%
4006 · Transfer App Fees	32,950	45,000	54,250	54,250	-	0%
4008 · Attorney - Motion	76,000	46,750	42,500	42,500	-	0%
4009 · House Counsel	23,800	20,400	15,450	15,450	-	0%
4010 · Section/Local Bar Support fees	98,883	99,617	100,346	100,346	-	0%
4011 · Admissions LPP	-	950	3,250	3,250	-	
4020 · NLTP Fees	62,850	65,250	58,050	58,050	-	0%
4021 · Lic Fees > 3 Years	3,572,085	3,636,825	3,710,510	3,710,510	-	0%
4022 · Lic Fees < 3 Years	223,540	221,365	210,010	210,010	-	0%
4023 · Lic Fees - House Counsel	35,040	40,405	48,978	48,978	-	0%
4025 · Pro Hac Vice Fees	65,800	79,600	151,150	151,150	-	0%
4024 · Lic Fees LPP	-	-	800	800	-	0%
4026 · Lic Fees - Inactive/FS	112,380	116,725	119,530	119,530	-	0%
4027 · Lic Fees - Inactive/NS	206,325	211,425	215,408	215,408	-	0%
4029 · Prior Year Lic Fees	5,685	6,800	8,288	8,288	-	0%
4030 · Certs of Good Standing	25,280	27,230	28,965	28,965	-	0%
4031 · Enhanced Web Revenue	-	-	-	-	-	#DIV/0!
4039 · Room Rental-All parties	109,925	102,773	102,705	102,705	-	0%
4042 · Food & Beverage Rev-All Parties	115,796	125,308	125,574	125,574	-	0%
4043 · Setup & A/V charges-All parties	1,044	1,402	1,351	1,351	-	0%
4051 · Meeting - Registration	404,028	399,950	255,163	170,178	(84,985)	-33%
4052 · Meeting - Sponsor Revenue	54,150	62,140	41,550	37,050	(4,500)	-11%
4053 · Meeting - Vendor Revenue	32,850	27,150	16,750	13,950	(2,800)	-17%
4054 · Meeting - Material Sales	2,185	-	-	-	-	0%
4055 · Meeting - Sp Ev Registration	16,856	17,377	7,075	3,775	(3,300)	-47%
4060 · E-Filing Revenue	21,809	48,363	33,639	33,639	-	0%
4061 · Advertising Revenue	148,172	185,840	174,001	174,001	-	0%
4062 · Subscriptions	60	90	60	60	-	0%
4063 · Modest Means revenue	11,225	10,725	11,600	11,600	-	0%
4071 · Mem Benefits - Lexis	696	1,473	1,327	1,327	-	0%
4072 · Royalty Inc - Bar J, MBNA, LM,M	6,225	6,801	6,577	6,577	-	0%
4081 · CLE - Registrations	468,040	451,978	422,340	422,340	-	0%
4082 · CLE - Video Library Sales	98,348	85,500	93,409	93,409	-	0%
4084 · Business Law Book Sales	6,856	3,315	-	-	-	#DIV/0!
4090 · Tenant Rent	21,672	21,086	21,672	21,672	-	0%
4093 · Law Day Revenue	3,570	2,700	2,100	2,100	-	0%
4095 · Miscellaneous Income	8,718	20,549	9,938	11,889	1,951	20%
4096 · Late Fees	96,850	62,330	90,000	-	(90,000)	-100%
4103 · In - Kind Revenue - UDR	1,806	2,318	2,434	(95)	(2,529)	-104%
4120 · Grant Income	-	55,219	58,219	36,812		
4151 · ILM Realized Gains / Losses	124,366	176,875	150,683	150,683	-	0%
4152 · ILM Interest Income	(5,445)	(903)	6,496	6,496	-	0%
4153 · ILM Unrealized Gains / Losses	(6,938)	8,528	(14,486)	(14,486)	-	0%
4155 · General Interest Income	302	1,250	1,650	1,650	-	0%
4200 · Seminar Profit/Loss	(7,496)	33,895	21,880	20,842	(1,039)	-5%
Total Revenue	6,550,412	6,799,024	6,668,543	6,459,934	(187,202)	-3%
Expenses						
Program Services						
5001 · Meeting Facility-external only	42,646	41,449	15,085	28,085	13,000	86%
5002 · Meeting facility-internal only	67,130	59,628	59,973	60,690	717	1%
5013 · ExamSoft	20,311	20,232	19,110	19,110	-	0%
5014 · Questions	79,436	40,701	72,498	72,498	-	0%
5015 · Investigations	300	425	600	755	155	26%
5016 · Credit Checks	2,273	2,058	2,177	2,177	-	0%
5017 · Medical Exam	240	160	320	320	-	0%
5025 · Temp Labor/Proctors	4,300	6,435	6,613	6,543	(70)	-1%
5030 · Speaker Fees & Expenses	29,139	15,635	16,052	15,548	(505)	-3%
5031 · Speaker Reimb. - Receipt Req'd	20,528	9,607	18,009	19,800	1,791	10%
5035 · Awards	5,068	7,388	9,786	9,786	-	0%
5037 · Grants/ contributions - general	11,700	8,840	12,670	12,670	-	0%
5040 · Witness & Hearing Expense	639	1,606	1,459	4,430	2,971	204%
5041 · Process Serving	732	1,211	716	1,000	284	40%
5042 · Operations Audit	-	-	-	-	-	0%
5045 · Bar Anniversary	-	-	-	-	-	0%
5046 · Court Reporting	1,897	75	-	-	-	#DIV/0!
5047 · Casemaker	71,313	72,584	57,418	52,250	(5,168)	-9%
5055 · Legislative Expense	44,126	47,615	57,072	60,000	2,928	5%
5060 · Program Special Activities	-	-	2,595	2,595	-	0%
5061 · LRE - Bar Support	65,000	65,000	65,000	60,000	(5,000)	-8%
5062 · Law Day	12,339	11,652	3,400	4,400	1,000	29%

Utah State Bar
Final FY2020 Budget - Summary by Account
Based on Actual Results through 3/31/20

	Actual FY 2018	Actual FY 2019	Projected FY 2020	Draft Budget FY 2021	\$ Change 2020 Projected vs 2021 Budget	% Change 2020 Projected vs 2021 Budget
5063 · Special Event Expense	84,047	82,330	61,680	24,843	(36,838)	-60%
5064 · MCLE Fees Paid	44,311	38,718	31,965	34,507	2,543	8%
5070 · Equipment Rental	47,536	41,896	68,315	39,167	(29,148)	-43%
5075 · Food & Bev-external costs only	508,871	469,643	476,465	357,568	(118,897)	-25%
5076 · Food & beverage - internal only	68,291	67,421	65,981	58,602	(7,380)	-11%
5079 · Soft Drinks	9,965	10,720	8,917	8,689	(228)	-3%
5085 · Misc. Program Expense	10,096	6,619	11,154	6,204	(4,950)	-44%
5090 · Commission Expense	28,655	33,339	35,172	35,172	-	0%
5095 · Wills for Heroes	1,676	969	1,226	1,226	-	0%
5099 · Blomquist Hale	73,946	73,832	73,721	73,721	-	0%
5702 · Travel - Lodging	56,913	60,715	69,254	33,764	(35,490)	-51%
5703 · Travel - Transportation/Parking	16,400	20,818	29,242	5,399	(23,844)	-82%
5704 · Travel - Mileage Reimbursement	12,585	17,682	8,849	3,625	(5,224)	-59%
5705 · Travel - Per Diems	6,131	4,949	5,420	790	(4,631)	-85%
5706 · Meals	-	-	-	-	-	#DIV/0!
5706 · Travel - Meals	1,479	1,542	1,024	-	(1,024)	-100%
5707 · Travel - Commission Mtgs	39,386	54,493	16,477	2,500	(13,977)	-85%
5805 · ABA Annual Meeting	21,806	19,714	15,308	-	(15,308)	-100%
5810 · ABA Mid Year Meeting	23,465	12,735	23,791	-	(23,791)	-100%
5815 · Commission/Education	24,783	26,473	22,030	2,350	(19,680)	-89%
5820 · ABA Annual Delegate	16,284	10,281	9,282	-	(9,282)	-100%
5830 · Western States Bar Conference	13,659	29,064	15,556	-	(15,556)	-100%
5840 · President's Expense	19,687	20,403	25,567	20,000	(5,567)	-22%
5841 · President's Reimbursement	5,554	1,785	3,532	3,532	-	0%
5845 · Reg Reform Task Force	-	6,012	4,671	-	(4,671)	-100%
5850 · Leadership Academy	12,400	12,471	20,000	10,000	(10,000)	-50%
5855 · Bar Review	2,416	1,729	931	-	(931)	-100%
5865 · Retreat	37,428	31,293	25,118	5,000	(20,118)	-80%
5866 · Wellbeing Committee	-	18,453	42,430	50,120	7,690	18%
5867 · Bar Membership Survey	-	-	50,000	-	(50,000)	0%
5868 · UCLI Support	-	-	50,000	-	(50,000)	0%
5960 · Overhead Allocation - Seminars	-	-	(15,000)	(20,000)	(5,000)	0%
5970 · Event Revenue Sharing - 3rd Pty	64,158	42,191	44,158	44,158	-	0%
Total Program Services Expenses	1,731,045	1,630,590	1,722,790	1,233,591	(489,199)	-28%
Salaries & Benefits						
5510 · Salaries/Wages	2,621,442	2,765,253	2,913,794	2,985,935	72,141	2%
5605 · Payroll Taxes	196,232	206,499	218,640	225,453	6,813	3%
5610 · Health Insurance	232,692	250,782	265,535	292,155	26,621	10%
5620 · Health Ins/Medical Reimb	4,960	6,040	6,515	6,507	(8)	0%
5630 · Dental Insurance	14,299	15,136	15,566	17,179	1,612	10%
5640 · Life & LTD Insurance	16,853	17,661	18,493	20,029	1,536	8%
5645 · Workman's Comp Insurance	2,544	2,487	2,430	2,430	-	0%
5650 · Retirement Plan Contributions	235,389	231,773	251,964	269,045	17,081	7%
5655 · Retirement Plan Fees & Costs	20,577	19,208	19,421	20,411	990	5%
5660 · Training/Development	19,226	21,559	21,734	14,556	(7,178)	-33%
Total Salaries/Benefit Expenses	3,364,215	3,536,399	3,734,093	3,853,701	119,608	3%
General & Administrative						
7025 · Office Supplies	21,389	25,395	26,205	23,799	(2,406)	-9%
7033 · Operating Meeting Supplies	21,998	23,675	22,131	22,131	-	0%
7035 · Postage/Mailing, net	60,459	53,924	55,414	52,676	(2,737)	-5%
7040 · Copy/Printing Expense	165,273	151,973	158,903	151,866	(7,037)	-4%
7041 · Copy/Print revenue	(26,262)	(25,255)	(23,434)	(23,434)	-	0%
7045 · Internet Service	20,758	13,868	11,754	11,766	12	0%
7050 · Computer Maintenance	28,232	48,627	58,496	59,647	1,151	2%
7055 · Computer Supplies & Small Equip	7,426	15,274	17,413	16,650	(763)	-4%
7089 · Membership Database Fees	51,734	28,437	27,910	41,000	13,090	47%
7095 · Fax Equip & Supplies	(67)	-	(25)	(25)	-	0%
7100 · Telephone	47,688	53,868	58,338	56,911	(1,428)	-2%
7105 · Advertising	48,203	54,435	73,780	11,850	(61,930)	-84%
7106 · Public Notification	608	1,149	-	1,225	1,225	#DIV/0!
7107 · Production Costs	-	-	500	11,000	10,500	2100%
7110 · Publications/Subscriptions	18,486	22,262	25,840	12,938	(12,902)	-50%
7115 · Public Relations	50,280	-	50,000	-	(50,000)	-100%
7120 · Membership/Dues	12,798	10,209	11,030	11,071	41	0%
7135 · Bank Service Charges	1,296	1,111	1,107	1,107	-	0%
7136 · ILM Service Charges	16,892	17,698	18,037	18,037	-	0%
7138 · Bad debt expense	-	-	0	0	-	0%
7140 · Credit Card Merchant Fees	109,131	107,682	112,447	104,755	(7,692)	-7%
7141 · Credit Card surcharge	(56,878)	(56,726)	(60,846)	(60,846)	-	0%
7145 · Commission Election Expense	3,256	1,912	2,699	2,699	-	0%
7150 · E&O/Off & Dir Insurance	50,947	51,519	51,843	51,843	-	0%
7160 · Audit Expense	31,363	33,546	34,265	34,265	-	0%
7170 · Lobbying Rebates	140	180	201	205	4	2%
7175 · O/S Consultants	107,887	74,541	111,176	118,699	7,524	7%

Utah State Bar
Final FY2020 Budget - Summary by Account
Based on Actual Results through 3/31/20

	Actual FY 2018	Actual FY 2019	Projected FY 2020	Draft Budget FY 2021	\$ Change 2020 Projected vs 2021 Budget	% Change 2020 Projected vs 2021 Budget
7176 · Bar Litigation	22,356	6,374	17,582	10,000	(7,582)	-43%
7177 · UPL	1,139	8,302	41,141	10,000	(31,141)	-76%
7178 · Offsite Storage/Backup	4,228	11,616	11,249	-	(11,249)	-100%
7179 · Payroll Adm Fees	2,826	2,885	3,161	3,161	-	0%
7180 · Administrative Fee Expense	1,176	773	1,065	1,065	-	0%
7190 · Lease Interest Expense	701	770	770	770	-	0%
7191 · Lease Sales Tax Expense	88	-	-	-	-	0%
7195 · Other Gen & Adm Expense	4,092	15,345	17,711	17,619	(92)	-1%
Total General & Administrative Expenses	829,644	755,367	937,863	774,451	(163,411)	-17%
In Kind Expenses						
7103 · InKind Contrib-UDR & all other	20,517	20,004	21,571	17,080	(4,491)	-21%
Building Overhead						
6015 · Janitorial Expense	30,155	29,784	30,081	30,984	902	3%
6020 · Heat	21,580	20,557	18,728	19,290	562	3%
6025 · Electricity	44,151	45,511	45,116	46,470	1,353	3%
6030 · Water/Sewer	5,426	7,483	7,796	8,030	234	3%
6035 · Outside Maintenance	12,438	13,190	16,502	16,997	495	3%
6040 · Building Repairs	10,006	23,160	20,683	21,304	620	3%
6045 · Bldg Mtnce Contracts	38,817	35,578	37,758	38,890	1,133	3%
6050 · Bldg Mtnce Supplies	5,282	5,235	806	830	24	3%
6055 · Real Property Taxes	37,207	30,172	28,764	29,627	863	3%
6060 · Personal Property Taxes	489	440	421	434	13	3%
6065 · Bldg Insurance/Fees	16,491	17,246	18,004	18,544	540	3%
6070 · Building & Improvements Depr	51,739	54,146	55,329	55,329	-	0%
6075 · Furniture & Fixtures Depr	15,612	13,584	10,109	10,109	-	0%
7065 · Computers, Equip & Sftwre Depr	176,237	174,003	149,547	149,547	-	0%
Total Building Overhead Expenses	465,632	470,092	439,644	446,384	6,740	2%
Total Expenses	6,411,052	6,412,452	6,855,960	6,325,207	(530,753)	-8%
Other Income/Expense						
4300 · Gain (Loss) - Sales of Assets	-	-	-	-	-	
Net Profit (Loss)	\$ 139,359	\$ 386,573	\$ (187,417)	\$ 134,727	\$ 343,551	-183%

Utah State Bar
Final FY2020 Budget
Based on Actual Results through 3/31/20
01 - Licensing

	Actual FY 2018	Actual FY 2019	Projected FY 2020	Draft Budget FY 2021	\$ Change 2020 Projected vs 2021 Budget	% Change 2020 Projected vs 2021 Budget
Revenue						
4010 · Section/Local Bar Support fees	17,039	17,808	17,102	17,102	-	0%
4021 · Lic Fees > 3 Years	3,572,085	3,636,825	3,710,510	3,710,510	-	0%
4022 · Lic Fees < 3 Years	223,540	221,365	210,010	210,010	-	0%
4023 · Lic Fees - House Counsel	35,040	40,405	48,978	48,978	-	0%
4025 · Pro Hac Vice Fees	65,750	79,600	151,150	151,150	-	0%
4024 · Lic Fees LPP	-	-	800	800		0%
4026 · Lic Fees - Inactive/FS	112,380	116,725	119,530	119,530	-	0%
4027 · Lic Fees - Inactive/NS	206,325	211,425	215,408	215,408	-	0%
4029 · Prior Year Lic Fees	5,685	6,800	8,288	8,288	-	0%
4030 · Certs of Good Standing	25,280	27,230	28,965	28,965	-	0%
4095 · Miscellaneous Income	695	675	1,123	1,123	-	0%
4096 · Late Fees	71,100	32,030	66,400	-	(66,400)	-100%
Total Revenue	4,334,919	4,390,888	4,578,262	4,511,862	(66,400)	-1%
Expenses						
Salaries & Benefits						
5510 · Salaries/Wages	43,829	28,372	32,716	32,716	-	0%
5605 · Payroll Taxes	2,961	1,824	2,395	2,395	-	0%
5610 · Health Insurance	5,019	5,384	5,548	5,825	277	5%
5630 · Dental Insurance	429	433	444	466	22	5%
5640 · Life & LTD Insurance	485	454	456	479	23	5%
5650 · Retirement Plan Contributions	3,765	2,105	2,858	2,858	-	0%
5655 · Retirement Plan Fees & Costs	710	663	637	650	13	2%
5660 · Training/Development	250	45	45	45	-	0%
Total Salaries/Benefit Expenses	57,497	39,304	45,100	45,435	335	1%
General & Administrative						
7025 · Office Supplies	790	541	1,089	1,089	-	0%
7035 · Postage/Mailing, net	10,584	6,028	6,282	6,282	-	0%
7040 · Copy/Printing Expense	3,923	2,399	2,420	2,420	-	0%
7050 · Computer Maintenance	1,862	3,767	7,852	8,245	393	5%
7089 · Membership Database Fees	7,664	-	-	-	-	#DIV/0!
7100 · Telephone	1,780	1,263	1,365	1,365	-	0%
7140 · Credit Card Merchant Fees	75,568	72,067	70,896	70,896	-	0%
7141 · Credit Card surcharge	(56,878)	(56,726)	(60,846)	(60,846)	-	0%
7175 · O/S Consultants	-	280	1,580	1,659	79	5%
Total General & Administrative Expenses	45,541	29,750	31,178	31,677	499	2%
Building Overhead						
6015 · Janitorial Expense	506	627	627	646	19	3%
6020 · Heat	376	432	390	401	12	3%
6025 · Electricity	742	957	943	971	28	3%
6030 · Water/Sewer	88	157	163	168	5	3%
6035 · Outside Maintenance	243	277	340	351	10	3%
6040 · Building Repairs	180	487	432	445	13	3%
6045 · Bldg Mtnce Contracts	653	748	788	812	24	3%
6050 · Bldg Mtnce Supplies	114	110	17	17	1	3%
6065 · Bldg Insurance/Fees	278	363	375	387	11	3%
6070 · Building & Improvements Depre	874	1,139	1,154	1,154	-	0%
6075 · Furniture & Fixtures Depre	264	286	211	211	-	0%
7065 · Computers, Equip & Sftwre Depr	2,994	3,660	3,121	3,121	-	0%
Total Building Overhead Expenses	7,312	9,244	8,563	8,685	122	1%
Total Expenses	110,350	78,298	84,841	85,797	956	1%
Net Profit (Loss)	\$ 4,224,569	\$ 4,312,590	\$ 4,493,421	\$ 4,426,065	\$ (67,356)	-1%

Utah State Bar
Final FY2020 Budget
Based on Actual Results through 3/31/20
02 - Admissions

	Actual FY 2018	Actual FY 2019	Projected FY 2020	Draft Budget FY 2021	\$ Change 2020 Projected vs 2021 Budget	% Change 2020 Projected vs 2021 Budget
Revenue						
4001 · Admissions - Student Exam Fees	\$ 130,025	\$ 124,025	135,575	135,575	\$ -	0%
4002 · Admissions - Attorney Exam Fees	47,475	45,475	46,225	46,225	-	0%
4003 · Admissions - Retake Fees	41,225	41,250	22,850	22,850	-	0%
4004 · Admissions - Laptop Fees	55,400	51,900	47,700	47,700	-	0%
4005 · Admissions - Application Forms	-	4,000	5,000	5,000	-	0%
4006 · Transfer App Fees	32,950	45,000	54,250	54,250	-	0%
4008 · Attorney - Motion	76,000	46,750	42,500	42,500	-	0%
4009 · House Counsel	23,800	20,400	15,450	15,450	-	0%
4095 · Miscellaneous Income	1,945	7,120	2,860	2,860	-	0%
4096 · Late Fees	25,750	30,300	23,600	-	(23,600)	-100%
Total Revenue	434,620	416,220	396,010	372,410	(23,600)	-6%
Expenses						
Program Services						
5001 · Meeting Facility-external only	12,874	14,523	7,586	7,586	-	0%
5002 · Meeting facility-internal only	6,761	6,394	5,204	5,204	-	0%
5013 · ExamSoft	20,311	20,232	19,110	19,110	-	0%
5014 · Questions	42,736	40,701	35,998	35,998	-	0%
5015 · Investigations	190	260	205	205	-	0%
5016 · Credit Checks	2,273	2,058	2,177	2,177	-	0%
5017 · Medical Exam	240	160	320	320	-	0%
5025 · Temp Labor/Proctors	4,300	5,410	6,100	6,100	-	0%
5070 · Equipment Rental	8,644	8,302	5,654	5,654	-	0%
5075 · Food & Bev-external costs only	3,409	9,303	3,941	3,941	-	0%
5076 · Food & beverage - internal only	8,376	8,262	5,895	5,895	-	0%
5702 · Travel - Lodging	1,290	-	2,030	-	(2,030)	-100%
5703 · Travel - Transportation/Parking	2,169	784	2,181	-	(2,181)	-100%
5704 · Travel - Mileage Reimbursement	86	88	342	-	(342)	-100%
5705 · Travel - Per Diems	1,013	331	647	-	(647)	-100%
Total Program Services Expenses	116,417	117,103	97,389	92,190	(5,200)	-5%
Salaries & Benefits						
5510 · Salaries/Wages	246,806	253,197	246,392	246,392	-	0%
5605 · Payroll Taxes	18,879	19,528	19,417	19,417	-	0%
5610 · Health Insurance	20,411	20,549	23,376	24,545	1,169	5%
5630 · Dental Insurance	1,286	1,335	1,362	1,430	68	5%
5640 · Life & LTD Insurance	1,571	1,609	1,560	1,560	-	0%
5650 · Retirement Plan Contributions	24,129	21,561	20,336	20,336	-	0%
5655 · Retirement Plan Fees & Costs	2,130	1,499	1,274	1,300	25	2%
5660 · Training/Development	995	1,445	870	870	-	0%
Total Salaries/Benefit Expenses	316,229	320,749	314,597	315,860	1,262	0%
General & Administrative						
7025 · Office Supplies	1,053	1,139	861	861	-	0%
7035 · Postage/Mailing, net	1,440	1,534	1,471	1,471	-	0%
7040 · Copy/Printing Expense	5,599	4,572	3,946	3,946	-	0%
7050 · Computer Maintenance	2,824	2,836	2,942	3,089	147	5%
7055 · Computer Supplies & Small Equip	139	463	953	953	-	0%
7089 · Membership Database Fees	3,900	3,900	21,550	36,000	14,450	67%
7100 · Telephone	3,347	3,789	4,097	4,097	-	0%
7105 · Advertising	-	75	75	75	-	0%
7110 · Publications/Subscriptions	147	216	218	218	-	0%
7120 · Membership/Dues	735	720	715	715	-	0%
7140 · Credit Card Merchant Fees	9,250	9,038	8,911	8,911	-	0%
7150 · E&O/Off & Dir Insurance	4,072	4,094	4,126	4,126	-	0%
7175 · O/S Consultants	-	841	4,741	4,978	237	
Total General & Administrative Expenses	32,506	33,217	54,601	69,435	14,835	27%
Building Overhead						
6015 · Janitorial Expense	1,085	1,607	1,607	1,655	48	3%
6020 · Heat	835	1,109	997	1,027	30	3%

Utah State Bar
Final FY2020 Budget
Based on Actual Results through 3/31/20
02 - Admissions

	Actual FY 2018	Actual FY 2019	Projected FY 2020	Draft Budget FY 2021	\$ Change 2020 Projected vs 2021 Budget	% Change 2020 Projected vs 2021 Budget
6025 · Electricity	1,590	2,455	2,416	2,488	72	3%
6030 · Water/Sewer	183	404	419	431	13	3%
6035 · Outside Maintenance	592	711	870	896	26	3%
6040 · Building Repairs	410	1,249	1,107	1,140	33	3%
6045 · Bldg Mtnce Contracts	1,402	1,919	2,019	2,080	61	3%
6050 · Bldg Mtnce Supplies	243	282	43	45	1	3%
6065 · Bldg Insurance/Fees	599	930	962	990	29	3%
6070 · Building & Improvements Depre	1,881	2,921	2,956	2,956	-	0%
6075 · Furniture & Fixtures Depre	569	733	541	541	-	0%
7065 · Computers, Equip & Sftwre Depr	6,483	9,386	7,994	7,994	-	0%
Total Building Overhead Expenses	15,870	23,707	21,930	22,243	313	1%
Total Expenses	481,022	494,776	488,517	499,728	11,210	2%
Net Profit (Loss)	\$ (46,402)	\$ (78,556)	\$ (92,507)	\$ (127,318)	\$ (34,810)	38%

Utah State Bar
Final FY2020 Budget
Based on Actual Results through 3/31/20
03 - NLTP

	Actual FY 2018	Actual FY 2019	Projected FY 2020	Draft Budget FY 2021	\$ Change 2020 Projected vs 2021 Budget	% Change 2020 Projected vs 2021 Budget
Revenue						
4020 · NLTP Fees	62,850	65,250	58,050	58,050	-	0%
4200 · Seminar Profit/Loss	(833)	1,099	1,099	1,099	-	0%
Total Revenue	62,017	66,349	59,149	59,149	-	0%
Expenses						
Program Services						
5002 · Meeting facility-internal only	1,680	1,455	1,490	1,490	-	0%
5075 · Food & Bev-external costs only	1,232	941	1,024	1,024	-	0%
5076 · Food & beverage - internal only	3,505	2,908	3,062	3,062	-	0%
Total Program Services Expenses	11,638	5,389	5,576	5,576	-	0%
Salaries & Benefits						
5510 · Salaries/Wages	38,915	30,411	40,579	64,000	23,421	58%
5605 · Payroll Taxes	3,280	2,475	3,402	5,365	1,962	58%
5640 · Life & LTD Insurance	395	406	409	409	-	0%
5650 · Retirement Plan Contributions	1,050	2,230	4,062	6,404	2,342	58%
5655 · Retirement Plan Fees & Costs	-	489	637	637	-	0%
5660 · Training/Development	475	45	470	470	-	0%
Total Salaries/Benefit Expenses	46,070	36,060	49,561	77,286	27,725	56%
General & Administrative						
7025 · Office Supplies	63	7	78	78	-	0%
7035 · Postage/Mailing, net	73	9	2	2	-	0%
7040 · Copy/Printing Expense	91	233	316	316	-	0%
7050 · Computer Maintenance	941	945	900	900	-	0%
7100 · Telephone	1,253	1,422	1,200	1,200	-	0%
7120 · Membership/Dues	500	545	515	515	-	0%
7140 · Credit Card Merchant Fees	1,427	1,485	1,427	1,427	-	0%
7175 · O/S Consultants	-	280	8,080	8,080	-	0%
Total General & Administrative Expenses	4,423	4,927	12,517	12,517	-	0%
Building Overhead						
6015 · Janitorial Expense	405	354	352	363	11	3%
6020 · Heat	284	244	218	224	7	3%
6025 · Electricity	593	541	530	546	16	3%
6030 · Water/Sewer	74	89	92	95	3	3%
6035 · Outside Maintenance	155	157	189	195	6	3%
6040 · Building Repairs	130	275	243	250	7	3%
6045 · Bldg Mtnce Contracts	521	423	443	456	13	3%
6050 · Bldg Mtnce Supplies	66	62	10	10	0	3%
6065 · Bldg Insurance/Fees	221	205	211	217	6	3%
6070 · Building & Improvements Depre	693	643	648	648	-	0%
6075 · Furniture & Fixtures Depre	209	161	119	119	-	0%
7065 · Computers, Equip & Sftwre Depr	2,355	2,067	1,752	1,752	-	0%
Total Building Overhead Expenses	5,708	5,220	4,805	4,873	69	1%
Total Expenses	67,839	51,595	72,458	100,252	27,794	38%
Net Profit (Loss)	\$ (5,822)	\$ 14,754	\$ (13,309)	\$ (41,103)	\$ (27,794)	209%

Utah State Bar
Final FY2020 Budget
Based on Actual Results through 3/31/20
04 - Bar Management

	Actual FY 2018	Actual FY 2019	Projected FY 2020	Draft Budget FY 2021	\$ Change 2020 Projected vs 2021 Budget	% Change 2020 Projected vs 2021 Budget
Revenue						
4060 · E-Filing Revenue	21,809	48,363	33,639	33,639	-	0%
4095 · Miscellaneous Income	829	1,405	1,159	1,159	-	0%
4103 · In - Kind Revenue - UDR	1,806	2,318	2,529	-	(2,529)	-100%
4120 · Grant Income	-	-	-	-	-	#DIV/0!
4151 · ILM Realized Gains / Losses	124,366	176,875	150,683	150,683	-	0%
4152 · ILM Interest Income	(5,445)	(903)	6,496	6,496	-	0%
4153 · ILM Unrealized Gains / Losses	(6,938)	8,528	(14,486)	(14,486)	-	0%
4155 · General Interest Income	302	1,250	1,650	1,650	-	0%
Total Revenue	136,729	237,837	181,670	179,141	(2,529)	-1%
Expenses						
Program Services						
5002 · Meeting facility-internal only	2,080	1,415	1,140	1,140	-	0%
5063 · Special Event Expense	1,913	-	-	-	-	0%
5075 · Food & Bev-external costs only	4,214	2,109	1,994	1,994	-	0%
5076 · Food & beverage - internal only	759	-	-	-	-	#DIV/0!
5079 · Soft Drinks	3,058	2,723	2,092	2,092	-	0%
5085 · Misc. Program Expense	-	491	-	-	-	#DIV/0!
5702 · Travel - Lodging	945	513	800	-	(800)	-100%
5703 · Travel - Transportation/Parking	218	1,432	457	-	(457)	-100%
5704 · Travel - Mileage Reimbursement	343	113	36	-	(36)	-100%
5705 · Travel - Per Diems	180	38	175	-	(175)	-100%
5805 · ABA Annual Meeting	7,262	5,343	3,947	-	(3,947)	-100%
5810 · ABA Mid Year Meeting	3,246	4,466	5,010	-	(5,010)	-100%
5830 · Western States Bar Conference	7,583	11,557	2,556	-	(2,556)	-100%
5960 · Overhead Allocation - Seminars	(23,376)	(22,401)	(22,773)	(22,773)	-	0%
Total Program Services Expenses	8,423	8,127	(4,566)	(17,546)	(12,980)	284%
Salaries & Benefits						
5510 · Salaries/Wages	527,038	529,301	562,176	572,176	10,000	2%
5605 · Payroll Taxes	37,016	37,744	39,171	40,031	860	2%
5610 · Health Insurance	41,483	45,849	44,573	55,406	10,833	24%
5620 · Health Ins/Medical Reimb	1,597	420	3,085	3,085	-	0%
5630 · Dental Insurance	1,787	2,278	2,181	2,674	493	23%
5640 · Life & LTD Insurance	3,010	3,464	3,669	4,260	591	16%
5645 · Workman's Comp Insurance	2,544	2,487	2,430	2,430	-	0%
5650 · Retirement Plan Contributions	53,550	49,861	46,164	46,164	-	0%
5655 · Retirement Plan Fees & Costs	3,549	2,989	2,705	2,759	54	2%
5660 · Training/Development	2,416	4,993	2,232	2,232	-	0%
Total Salaries/Benefit Expenses	673,990	679,385	708,387	731,218	22,831	3%
General & Administrative						
7025 · Office Supplies	7,499	9,352	8,417	8,417	-	0%
7035 · Postage/Mailing, net	1,105	1,012	1,081	1,081	-	0%
7040 · Copy/Printing Expense	2,929	2,797	3,177	3,177	-	0%
7050 · Computer Maintenance	4,707	4,727	5,026	5,026	-	0%
7055 · Computer Supplies & Small Equip	291	1,275	2,062	2,062	-	0%
7100 · Telephone	5,274	7,257	7,931	7,931	-	0%
7105 · Advertising	-	460	75	75	-	0%
7110 · Publications/Subscriptions	2,510	2,988	5,691	5,691	-	0%
7120 · Membership/Dues	3,794	1,528	1,945	1,945	-	0%
7135 · Bank Service Charges	1,178	1,111	1,054	1,054	-	0%
7136 · ILM Service Charges	16,892	17,698	18,037	18,037	-	0%
7140 · Credit Card Merchant Fees	(1,642)	(897)	417	417	-	0%
7150 · E&O/Off & Dir Insurance	9,184	9,386	9,418	9,418	-	0%
7160 · Audit Expense	31,363	33,546	34,265	34,265	-	0%
7175 · O/S Consultants	11,195	9,310	17,944	17,944	-	0%
7179 · Payroll Adm Fees	2,826	2,885	3,161	3,161	-	0%
7180 · Administrative Fee Expense	1,176	773	1,065	1,065	-	0%
7190 · Lease Interest Expense	701	770	770	770	-	0%
7195 · Other Gen & Adm Expense	2,016	9,601	8,476	8,476	-	0%

Utah State Bar
Final FY2020 Budget
Based on Actual Results through 3/31/20
04 - Bar Management

	Actual FY 2018	Actual FY 2019	Projected FY 2020	Draft Budget FY 2021	\$ Change 2020 Projected vs 2021 Budget	% Change 2020 Projected vs 2021 Budget
Total General & Administrative Expenses	104,141	115,943	130,011	130,011	-	0%
In Kind Expenses						
7103 · InKind Contrib-UDR & all other	3,689	4,209	4,491	-	(4,491)	-100%
Building Overhead						
6015 · Janitorial Expense	2,024	2,410	2,438	2,511	73	3%
6020 · Heat	1,493	1,663	1,518	1,564	46	3%
6025 · Electricity	2,964	3,683	3,655	3,764	110	3%
6030 · Water/Sewer	355	606	631	650	19	3%
6035 · Outside Maintenance	945	1,067	1,340	1,380	40	3%
6040 · Building Repairs	710	1,874	1,675	1,726	50	3%
6045 · Bldg Mtnce Contracts	2,610	2,879	3,059	3,151	92	3%
6050 · Bldg Mtnce Supplies	395	424	65	67	2	3%
6065 · Bldg Insurance/Fees	1,111	1,395	1,459	1,503	44	3%
6070 · Building & Improvements Depr	3,488	4,381	4,483	4,483	-	0%
6075 · Furniture & Fixtures Depr	1,053	1,099	819	819	-	0%
7065 · Computers, Equip & Sftwre Depr	11,939	14,080	12,117	12,117	-	0%
Total Building Overhead Expenses	29,087	35,561	33,259	33,734	475	1%
Total Expenses	819,329	843,224	871,582	877,418	5,836	1%
Other Income/Expense						
4300 · Gain (Loss) - Sales of Assets	-		-	-	-	
Net Profit (Loss)	\$ (682,600)	\$ (605,388)	\$ (689,912)	\$ (698,277)	\$ (8,365)	1%

Utah State Bar
Final FY2020 Budget
Based on Actual Results through 3/31/20
05 - Property Management

	Actual FY 2018	Actual FY 2019	Projected FY 2020	Draft Budget FY 2021	\$ Change 2020 Projected vs 2021 Budget	% Change 2020 Projected vs 2021 Budget
Revenue						
4039 · Room Rental-All parties	109,925	102,773	102,705	102,705	-	0%
4042 · Food & Beverage Rev-All Parties	115,796	125,308	125,574	125,574	-	0%
4043 · Setup & A/V charges-All parties	1,044	1,402	1,351	1,351	-	0%
4090 · Tenant Rent	21,672	21,086	21,672	21,672	-	0%
4095 · Miscellaneous Income	105	70	21	21	-	0%
Total Revenue	248,542	250,639	251,228	251,228	-	0%
Expenses						
Program Services						
5002 · Meeting facility-internal only	-	95	205	205	-	0%
5070 · Equipment Rental	844	1,157	1,201	1,201	-	0%
5075 · Food & Bev-external costs only	103,858	111,946	112,695	112,695	-	0%
5076 · Food & beverage - internal only	-	-	274	274	-	0%
5079 · Soft Drinks	6,907	7,911	6,447	6,447	-	0%
Total Program Services Expenses	112,590	121,765	120,822	120,822	-	0%
Salaries & Benefits						
5510 · Salaries/Wages	109,616	111,339	122,550	122,550	-	0%
5605 · Payroll Taxes	8,827	8,661	9,498	9,498	-	0%
5610 · Health Insurance	15,978	16,401	18,170	19,079	909	5%
5620 · Health Ins/Medical Reimb	555	1,120	598	598	-	0%
5630 · Dental Insurance	858	866	888	933	44	5%
5640 · Life & LTD Insurance	701	696	701	736	35	5%
5650 · Retirement Plan Contributions	10,156	10,027	10,958	10,958	-	0%
5655 · Retirement Plan Fees & Costs	1,420	1,326	1,274	1,300	25	2%
5660 · Training/Development	600	90	90	90	-	0%
Total Salaries/Benefit Expenses	148,711	150,527	164,728	165,742	1,013	1%
General & Administrative						
7025 · Office Supplies	866	1,436	1,485	1,485	-	0%
7033 · Operating Meeting Supplies	21,998	22,789	21,610	21,610	-	0%
7035 · Postage/Mailing, net	2,060	(348)	(1,891)	(1,891)	-	0%
7040 · Copy/Printing Expense	3,650	3,697	6,159	6,159	-	0%
7041 · Copy/Print revenue	(26,262)	(25,255)	(23,434)	(23,434)	-	0%
7055 · Computer Supplies & Small Equip	471	603	1,802	1,802	-	0%
7100 · Telephone	5,259	4,478	4,892	4,892	-	0%
7175 · O/S Consultants	-	561	3,161	3,161	-	0%
Total General & Administrative Expenses	8,150	8,153	15,531	15,564	32	0%
In Kind Expenses						
7103 · InKind Contrib-UDR & all other	16,828	15,795	17,080	17,080	-	0%
Building Overhead						
6015 · Janitorial Expense	15,342	15,282	15,434	15,897	463	3%
6020 · Heat	11,007	10,548	9,609	9,897	288	3%
6025 · Electricity	22,462	23,351	23,148	23,843	694	3%
6030 · Water/Sewer	2,758	3,839	4,000	4,120	120	3%
6035 · Outside Maintenance	6,363	6,767	8,467	8,721	254	3%
6040 · Building Repairs	5,103	11,883	10,612	10,930	318	3%
6045 · Bldg Mtnce Contracts	19,750	18,255	19,373	19,954	581	3%
6050 · Bldg Mtnce Supplies	2,694	2,686	413	426	12	3%
6055 · Real Property Taxes	14,883	12,069	11,506	11,851	345	3%
6060 · Personal Property Taxes	196	176	169	174	5	3%
6065 · Bldg Insurance/Fees	8,391	8,849	9,237	9,515	277	3%
6070 · Building & Improvements Depre	26,327	27,782	28,388	28,388	-	0%
6075 · Furniture & Fixtures Depre	7,944	6,970	5,187	5,187	-	0%
7065 · Computers, Equip & Sftwre Depr	89,696	89,278	76,730	76,730	-	0%
Total Building Overhead Expenses	232,915	237,734	222,273	225,632	3,359	2%
Total Expenses	519,194	533,973	540,435	544,840	4,405	1%
Net Profit (Loss)	\$ (270,652)	\$ (283,334)	\$ (289,207)	\$ (293,612)	\$ (4,405)	2%

Utah State Bar
Final FY2020 Budget
Based on Actual Results through 3/31/20
06 - Office of Prof Conduct

	Actual FY 2018	Actual FY 2019	Projected FY 2020	Draft Budget FY 2021	\$ Change 2020 Projected vs 2021 Budget	% Change 2020 Projected vs 2021 Budget
Revenue						
4095 · Miscellaneous Income	5,059	6,269	4,569	6,687	2,119	46%
4200 · Seminar Profit/Loss	16,229	27,065	21,838	22,500	662	3%
Total Revenue	21,288	33,333	26,406	29,187	2,781	11%
Expenses						
Program Services						
5002 · Meeting facility-internal only	460	-	95	95	-	0%
5015 · Investigations	-	118	325	480	155	48%
5025 · Temp Labor/Proctors	-	-	70	-	(70)	-100%
5040 · Witness & Hearing Expense	1,733	2,011	2,029	5,000	2,971	146%
5041 · Process Serving	656	1,211	716	1,000	284	40%
5046 · Court Reporting	152	-	-	-	-	#DIV/0!
5075 · Food & Bev-external costs only	-	659	331	335	4	1%
5076 · Food & beverage - internal only	191	-	-	-	-	#DIV/0!
5079 · Soft Drinks	-	86	378	150	(228)	-60%
5085 · Misc. Program Expense	420	-	-	-	-	#DIV/0!
5702 · Travel - Lodging	3,911	7,257	7,390	-	(7,390)	-100%
5703 · Travel - Transportation/Parking	1,768	3,338	5,735	-	(5,735)	-100%
5704 · Travel - Mileage Reimbursement	1,309	2,936	726	-	(726)	-100%
5705 · Travel - Per Diems	684	1,723	2,278	-	(2,278)	-100%
5805 · ABA Annual Meeting	5,866	5,350	1,573	-	(1,573)	-100%
5810 · ABA Mid Year Meeting	7,197	2,364	5,060	-	(5,060)	-100%
Total Program Services Expenses	24,347	27,053	26,705	7,060	(19,645)	-74%
Salaries & Benefits						
5510 · Salaries/Wages	881,043	945,401	968,433	968,433	-	0%
5605 · Payroll Taxes	64,622	70,258	73,566	73,566	-	0%
5610 · Health Insurance	78,987	79,613	84,753	88,990	4,238	5%
5620 · Health Ins/Medical Reimb	941	1,195	1,652	1,652	-	0%
5630 · Dental Insurance	5,682	6,177	6,364	6,682	318	5%
5640 · Life & LTD Insurance	5,624	5,768	5,857	6,150	293	5%
5650 · Retirement Plan Contributions	78,849	86,153	95,596	95,596	-	0%
5655 · Retirement Plan Fees & Costs	6,558	6,775	7,162	7,305	143	2%
5660 · Training/Development	6,385	5,480	9,685	2,500	(7,185)	-74%
Total Salaries/Benefit Expenses	1,128,691	1,206,819	1,253,067	1,250,873	(2,193)	0%
General & Administrative						
7025 · Office Supplies	5,135	6,738	6,577	4,500	(2,077)	-32%
7035 · Postage/Mailing, net	5,630	4,994	4,175	4,000	(175)	-4%
7040 · Copy/Printing Expense	14,665	17,855	18,819	13,000	(5,819)	-31%
7045 · Internet Service	-	104	498	500	2	0%
7050 · Computer Maintenance	2,824	3,711	5,674	5,600	(74)	-1%
7055 · Computer Supplies & Small Equip	589	2,482	2,617	1,800	(817)	-31%
7089 · Membership Database Fees	8,087	11,133	2,360	5,000	2,640	112%
7100 · Telephone	12,937	14,441	16,386	15,000	(1,386)	-8%
7105 · Advertising	360	-	150	225	75	50%
7106 · Public Notification	608	1,149	-	1,225	1,225	#DIV/0!
7110 · Publications/Subscriptions	10,328	12,079	12,917	10,500	(2,417)	-19%
7120 · Membership/Dues	4,810	4,745	4,460	4,500	40	1%
7140 · Credit Card Merchant Fees	982	-	-	-	-	#DIV/0!
7150 · E&O/Off & Dir Insurance	14,253	14,327	14,441	14,441	-	0%
7175 · O/S Consultants	-	3,366	27,281	32,550	5,269	19%
7176 · Bar Litigation	-	-	4,378	-	(4,378)	-100%
7178 · Offsite Storage/Backup	4,228	11,616	11,249	-	(11,249)	-100%

Utah State Bar
Final FY2020 Budget
Based on Actual Results through 3/31/20
06 - Office of Prof Conduct

	Actual FY 2018	Actual FY 2019	Projected FY 2020	Draft Budget FY 2021	\$ Change 2020 Projected vs 2021 Budget	% Change 2020 Projected vs 2021 Budget
7195 · Other Gen & Adm Expense	-	446	245	100	(145)	-59%
Total General & Administrative Expenses	85,437	109,184	132,227	112,941	(19,287)	-15%
Building Overhead						
6015 · Janitorial Expense	6,037	5,608	5,664	5,834	170	3%
6020 · Heat	4,275	3,871	3,526	3,632	106	3%
6025 · Electricity	8,838	8,570	8,496	8,750	255	3%
6030 · Water/Sewer	1,095	1,409	1,468	1,512	44	3%
6035 · Outside Maintenance	2,395	2,484	3,107	3,201	93	3%
6040 · Building Repairs	1,970	4,361	3,895	4,012	117	3%
6045 · Bldg Mtnce Contracts	7,767	6,700	7,110	7,323	213	3%
6050 · Bldg Mtnce Supplies	1,019	986	152	156	5	3%
6065 · Bldg Insurance/Fees	3,298	3,247	3,390	3,492	102	3%
6070 · Building & Improvements Depr	10,344	10,196	10,419	10,419	-	0%
6075 · Furniture & Fixtures Depr	3,121	2,558	1,903	1,903	-	0%
7065 · Computers, Equip & Sftwre Depr	35,185	32,765	28,160	28,160	-	0%
Total Building Overhead Expenses	85,342	82,755	77,290	78,395	1,104	1%
Total Expenses	1,323,817	1,425,811	1,489,289	1,449,269	(40,020)	-3%
Net Profit (Loss)	\$ (1,302,529)	\$ (1,392,478)	\$ (1,462,883)	\$ (1,420,082)	\$ 42,801	-3%

NOTES TO OPC BUDGET:

- 1 Aside from regular required services, the following computer or IT maintenance contracts have been included in the FY 20/21 budget above for accounts 7050 · Computer Maintenance, 7089 · Membership Database, 7100 · Telephone and 7175 · O/S Consultants

Account	Amount	Vendor	Purpose
7175 · O/S Consultant	\$775/month	Braintrace	Threat traffic monitoring
7050 · Computer Maintenance	\$250/month	Euclid	Annual maintenance
7175 · O/S Consultant	\$1,200/month	ClearLink	Computer virus protection, routine computer updates and server, workstation & network maintenance
7100 · Telephone	\$88/quarter	ClearLink	Vulnerability scans
7100 · Telephone	\$2,500/year	ClearLink	Firewall maintenance
7100 · Telephone	\$540/month	ClearLink	Office 365 Windows subscription
7089 · Membership Database	\$5,000/year	Unknown	JustWare/case management replacement beginning Jan. 2021

NOTE: The annual total cost of the items listed above is approximately \$40,000, which have been included in the FY 20/21 budget for accounts listed above.

- 2 In addition to the contractual amounts with ClearLink listed above, ancillary IT support provided by Euclid is charged at \$175/hour. It is anticipated and budgeted that OPC will incur approximately 10 hours during FY 20/21.
- 3 No major software upgrades are expected for the FY 20/21 for OPC.
- 4 No major computer/hardware purchases are expected for FY20/21 for OPC.
- 5 Each year, the Bar anticipates an operational reserve of \$200,000. Of that reserve, \$25,000 has been allocated to OPC.
- 6 Approximately 50% of the General Counsel Assistant's time is spent on disciplinary matters. 50% of the total benefits and salaries would amount to approximately \$30,700 per year. Currently, the entire cost is charged to the General Counsel department and no expense related to the General Counsel Assistant is charged to OPC.
- 7 Any disciplinary-related expenses billed to General Counsel remain as a General Counsel expense and are not charged to OPC.

Utah State Bar
Final FY2020 Budget
Based on Actual Results through 3/31/20
07 - General Counsel

	Actual FY 2018	Actual FY 2019	Projected FY 2020	Draft Budget FY 2021	\$ Change 2020 Projected vs 2021 Budget	% Change 2020 Projected vs 2021 Budget
Expenses						
Program Services						
5002 · Meeting facility-internal only	5,420	4,155	3,895	3,895	-	0%
5015 · Investigations	110	47	70	70	-	0%
5040 · Witness & Hearing Expense	(1,095)	(405)	(570)	(570)	-	0%
5076 · Food & beverage - internal only	2,760	2,557	2,482	2,482	-	0%
5703 · Travel - Transportation/Parking	1,759	1,049	639	639	-	0%
5704 · Travel - Mileage Reimbursement	357	332	354	354	-	0%
5707 · Travel - Commission Mtgs	163	-	-	-	-	#DIV/0!
5805 · ABA Annual Meeting	3,335	-	-	-	-	#DIV/0!
5810 · ABA Mid Year Meeting	-	-	2,067	-	(2,067)	-100%
Total Program Services Expenses	15,649	7,736	8,936	6,869	(2,067)	-23%
Salaries & Benefits						
5510 · Salaries/Wages	185,715	185,582	199,991	214,971	14,980	7%
5605 · Payroll Taxes	13,120	14,020	15,000	17,198	2,198	15%
5610 · Health Insurance	12,456	14,219	15,256	16,019	763	5%
5620 · Health Ins/Medical Reimb	3	6	7	7	-	0%
5630 · Dental Insurance	429	433	444	466	22	5%
5640 · Life & LTD Insurance	1,099	1,094	1,099	1,154	55	5%
5650 · Retirement Plan Contributions	18,072	19,149	19,721	21,497	1,776	9%
5655 · Retirement Plan Fees & Costs	1,420	1,326	1,274	1,300	25	2%
5660 · Training/Development	800	1,660	635	635	-	0%
Total Salaries/Benefit Expenses	233,114	237,490	253,428	273,247	19,819	8%
General & Administrative						
7025 · Office Supplies	304	153	459	459	-	0%
7035 · Postage/Mailing, net	487	338	389	389	-	0%
7040 · Copy/Printing Expense	1,338	2,493	2,567	2,567	-	0%
7045 · Internet Service	-	398	80	80	-	0%
7050 · Computer Maintenance	1,883	3,991	6,004	6,004	-	0%
7055 · Computer Supplies & Small Equip	2,660	1,309	530	530	-	0%
7100 · Telephone	2,233	2,526	2,768	2,768	-	0%
7105 · Advertising	-	-	-	-	-	#DIV/0!
7106 · Public Notification	-	-	-	-	-	0%
7107 · Production Costs	-	-	-	-	-	0%
7110 · Publications/Subscriptions	1,892	1,919	1,886	1,886	-	0%
7120 · Membership/Dues	820	845	825	825	-	0%
7150 · E&O/Off & Dir Insurance	4,072	4,094	4,126	4,126	-	0%
7175 · O/S Consultants	-	1,091	3,843	3,843	-	0%
7176 · Bar Litigation	22,356	6,374	13,204	10,000	(3,204)	-24%
7177 · UPL	1,139	8,302	41,141	10,000	(31,141)	-76%
Total General & Administrative Expenses	39,184	34,028	77,822	43,477	(34,345)	-44%
Building Overhead						
6015 · Janitorial Expense	1,065	844	853	878	26	3%
6020 · Heat	738	582	531	547	16	3%
6025 · Electricity	1,559	1,289	1,279	1,317	38	3%
6030 · Water/Sewer	197	212	221	228	7	3%
6035 · Outside Maintenance	383	374	468	482	14	3%
6040 · Building Repairs	334	656	586	604	18	3%
6045 · Bldg Mtnce Contracts	1,369	1,008	1,070	1,102	32	3%
6050 · Bldg Mtnce Supplies	165	148	23	24	1	3%
6065 · Bldg Insurance/Fees	580	489	510	526	15	3%
6070 · Building & Improvements Depre	1,820	1,534	1,568	1,568	-	0%
6075 · Furniture & Fixtures Depre	549	385	286	286	-	0%
7065 · Computers, Equip & Sftwre Depr	6,170	4,930	4,239	4,239	-	0%
Total Building Overhead Expenses	14,929	12,451	11,634	11,800	166	1%
Total Expenses	302,876	291,705	351,820	335,393	(16,427)	-5%
Net Profit (Loss)	\$ (302,876)	\$ (291,705)	\$ (351,820)	\$ (335,393)	\$ 16,427	-5%

Utah State Bar
Final FY2020 Budget
Based on Actual Results through 3/31/20
08 - Computer/MIS/Internet

	Actual FY 2018	Actual FY 2019	Projected FY 2020	Draft Budget FY 2021	\$ Change 2020 Projected vs 2021 Budget	% Change 2020 Projected vs 2021 Budget
Expenses						
Program Services						
5025 · Temp Labor/Proctors	-	1,025	443	443	-	0%
5075 · Food & Bev-external costs only	-	889	32	32	-	
5095 · Wills for Heroes	-	519	519	519	-	0%
5702 · Travel - Lodging	432	2,379	6,380	-	(6,380)	-100%
5703 · Travel - Transportation/Parking	1,517	1,411	1,928	-	(1,928)	-100%
5704 · Travel - Mileage Reimbursement	-	308	880	-	(880)	-100%
5705 · Travel - Per Diems	-	652	1,019	-	(1,019)	-100%
5706 · Travel - Meals	-	37	21	-	(21)	-100%
Total Program Services Expenses	1,949	7,237	11,221	993	(10,228)	-91%
Salaries & Benefits						
5510 · Salaries/Wages	120,436	157,550	188,269	188,269	-	0%
5605 · Payroll Taxes	9,744	11,841	12,988	12,988	-	0%
5610 · Health Insurance	11,835	19,014	22,635	23,767	1,132	5%
5630 · Dental Insurance	787	691	738	775	37	5%
5640 · Life & LTD Insurance	874	1,007	1,162	1,220	58	5%
5650 · Retirement Plan Contributions	12,925	1,721	10,308	10,308	-	0%
5655 · Retirement Plan Fees & Costs	1,420	174	469	478	9	2%
5660 · Training/Development	1,745	5,496	5,287	5,287	-	0%
Total Salaries/Benefit Expenses	159,765	197,493	241,855	243,092	1,236	1%
General & Administrative						
7025 · Office Supplies	1,646	1,685	1,083	1,083	-	0%
7040 · Copy/Printing Expense	-	32	2,278	2,278	-	0%
7045 · Internet Service	14,360	6,241	5,485	5,485	-	0%
7050 · Computer Maintenance	1,883	12,726	7,711	7,711	-	0%
7055 · Computer Supplies & Small Equip	1,605	4,301	6,614	6,614	-	0%
7089 · Membership Database Fees	12,751	1,160	-	-	-	#DIV/0!
7100 · Telephone	2,662	5,442	5,541	5,541	-	0%
7105 · Advertising	538	-	-	-	-	#DIV/0!
7110 · Publications/Subscriptions	1,856	2,262	1,150	1,150	-	0%
7120 · Membership/Dues	231	569	785	785	-	0%
7175 · O/S Consultants	94,192	56,036	28,014	28,014	-	0%
Total General & Administrative Expenses	132,300	90,693	58,941	58,941	-	0%
Building Overhead						
6015 · Janitorial Expense	696	860	858	884	26	3%
6020 · Heat	517	594	532	548	16	3%
6025 · Electricity	1,019	1,314	1,291	1,330	39	3%
6030 · Water/Sewer	121	216	224	231	7	3%
6035 · Outside Maintenance	334	381	463	477	14	3%
6040 · Building Repairs	247	669	592	609	18	3%
6045 · Bldg Mtnce Contracts	897	1,028	1,079	1,111	32	3%
6050 · Bldg Mtnce Supplies	139	151	23	24	1	3%
6065 · Bldg Insurance/Fees	382	498	514	529	15	3%
6070 · Building & Improvements Depre	1,200	1,564	1,579	1,579	-	0%
6075 · Furniture & Fixtures Depre	362	392	289	289	-	0%
7065 · Computers, Equip & Sftwre Depr	4,112	5,025	4,270	4,270	-	0%
Total Building Overhead Expenses	10,026	12,693	11,714	11,881	167	1%
Total Expenses	304,039	308,115	323,731	314,907	(8,824)	-3%
Net Profit (Loss)	\$ (304,039)	\$ (308,115)	\$ (323,731)	\$ (314,907)	\$ 8,824	-3%

Utah State Bar
Final FY2020 Budget
Based on Actual Results through 3/31/20
CLE

	Actual FY 2018	Actual FY 2019	Projected FY 2020	Draft Budget FY 2021	\$ Change 2020 Projected vs 2021 Budget	% Change 2020 Projected vs 2021 Budget
Revenue						
4052 · Meeting - Sponsor Revenue	15,500	22,550	22,050	22,050	-	0%
4053 · Meeting - Vendor Revenue	-	-	-	-	-	#DIV/0!
4081 · CLE - Registrations	467,772	451,978	422,340	422,340	-	0%
4082 · CLE - Video Library Sales	98,348	85,500	93,409	93,409	-	0%
4200 · Seminar Profit/Loss	(25,626)	(2,037)	(9,761)	(9,761)	-	0%
Total Revenue	565,080	561,306	528,039	528,039	-	0%
Expenses						
Program Services						
5001 · Meeting Facility-external only	10,459	7,290	6,187	6,187	-	0%
5002 · Meeting facility-internal only	8,220	6,750	8,042	8,042	-	0%
5030 · Speaker Fees & Expenses	16,155	11,885	15,548	15,548	-	0%
5031 · Speaker Reimb. - Receipt Req'd	17,411	5,837	17,426	17,426	-	0%
5035 · Awards	1,763	5,209	6,980	6,980	-	0%
5037 · Grants/ contributions - general	3,000	-	6,000	6,000	-	0%
5063 · Special Event Expense	18,057	16,577	19,843	19,843	-	0%
5064 · MCLE Fees Paid	29,372	26,491	22,615	22,615	-	0%
5070 · Equipment Rental	16,896	6,168	20,288	20,288	-	0%
5075 · Food & Bev-external costs only	179,000	136,314	135,413	135,413	-	0%
5076 · Food & beverage - internal only	19,164	22,115	22,972	22,972	-	0%
5085 · Misc. Program Expense	3,856	965	965	965	-	0%
5702 · Travel - Lodging	7,958	19,723	28,555	28,555	-	0%
5703 · Travel - Transportation/Parking	202	4,770	4,417	4,417	-	0%
5704 · Travel - Mileage Reimbursement	735	462	271	271	-	0%
5960 · Overhead Allocation - Seminars	(26,624)	(27,599)	(27,228)	(27,228)	-	0%
5970 · Event Revenue Sharing - 3rd Pty	64,158	42,191	44,158	44,158	-	0%
Total Program Services Expenses	369,932	285,631	332,452	332,452	-	0%
Salaries & Benefits						
5510 · Salaries/Wages	100,837	93,650	103,945	103,945	-	0%
5605 · Payroll Taxes	8,922	7,613	8,818	8,818	-	0%
5610 · Health Insurance	12,982	10,452	5,256	5,519	263	5%
5620 · Health Ins/Medical Reimb	11	11	10	10	-	0%
5630 · Dental Insurance	576	433	257	270	13	5%
5640 · Life & LTD Insurance	799	763	760	798	38	5%
5650 · Retirement Plan Contributions	7,603	7,314	10,512	10,512	-	0%
5655 · Retirement Plan Fees & Costs	1,072	1,152	1,274	1,300	25	2%
5660 · Training/Development	1,500	1,090	325	325	-	0%
Total Salaries/Benefit Expenses	134,302	122,478	131,159	131,498	339	0%
General & Administrative						
7025 · Office Supplies	1,266	2,142	3,616	3,616	-	0%
7033 · Operating Meeting Supplies	-	520	520	520	-	0%
7035 · Postage/Mailing, net	8,071	6,940	7,046	7,046	-	0%
7040 · Copy/Printing Expense	26,107	14,001	18,237	18,237	-	0%
7045 · Internet Service	72	196	1,208	1,208	-	0%
7050 · Computer Maintenance	1,883	3,130	2,432	2,432	-	0%
7055 · Computer Supplies & Small Equip	883	4,169	1,445	1,445	-	0%
7100 · Telephone	2,592	2,838	3,059	3,059	-	0%
7110 · Publications/Subscriptions	-	-	808	808	-	0%
7120 · Membership/Dues	561	45	530	530	-	0%
7135 · Bank Service Charges	118	-	29	29	-	0%
7140 · Credit Card Merchant Fees	12,566	13,122	15,364	15,364	-	0%
7175 · O/S Consultants	2,000	1,091	3,691	3,691	-	0%
7195 · Other Gen & Adm Expense	180	1,002	1,729	1,729	-	0%
Total General & Administrative Expenses	60,080	49,196	59,714	59,714	-	0%
Building Overhead						
6015 · Janitorial Expense	680	391	395	406	12	3%
6020 · Heat	455	270	246	253	7	3%
6025 · Electricity	995	597	592	610	18	3%

Utah State Bar
Final FY2020 Budget
Based on Actual Results through 3/31/20
CLE

	Actual FY 2018	Actual FY 2019	Projected FY 2020	Draft Budget FY 2021	\$ Change 2020 Projected vs 2021 Budget	% Change 2020 Projected vs 2021 Budget
6030 · Water/Sewer	129	98	102	105	3	3%
6035 · Outside Maintenance	205	173	216	223	6	3%
6040 · Building Repairs	199	304	271	279	8	3%
6045 · Bldg Mtnce Contracts	872	467	495	510	15	3%
6050 · Bldg Mtnce Supplies	91	69	11	11	0	3%
6055 · Real Property Taxes	11,162	9,052	8,629	8,888	259	3%
6060 · Personal Property Taxes	147	132	126	130	4	3%
6065 · Bldg Insurance/Fees	369	226	236	243	7	3%
6070 · Building & Improvements Depre	1,157	710	726	726	-	0%
6075 · Furniture & Fixtures Depre	348	178	133	133	-	0%
7065 · Computers, Equip & Sftwre Depr	3,900	2,282	1,962	1,962	-	0%
Total Building Overhead Expenses	20,709	14,948	14,140	14,479	340	2%
Total Expenses	585,023	472,253	537,465	538,144	679	0%
Net Profit (Loss)	\$ (19,942)	\$ 89,053	\$ (9,426)	\$ (10,105)	\$ (679)	7%

Utah State Bar
Final FY2020 Budget
Based on Actual Results through 3/31/20
10 - Summer Convention

	Actual FY 2018	Actual FY 2019	Projected FY 2020	Draft Budget FY 2021	\$ Change 2020 Projected vs 2021 Budget	% Change 2020 Projected vs 2021 Budget
Revenue						
4051 · Meeting - Registration	234,820	199,695	181,985	-	(181,985)	-100%
4052 · Meeting - Sponsor Revenue	20,550	25,500	19,500	-	(19,500)	-100%
4053 · Meeting - Vendor Revenue	13,100	9,800	11,800	-	(11,800)	-100%
4055 · Meeting - Sp Ev Registration	14,810	15,470	5,300	-	(5,300)	-100%
Total Revenue	283,280	250,465	218,585	-	(218,585)	-100%
Expenses						
Program Services						
5001 · Meeting Facility-external only	6,134	7,406	-	5,000	5,000	-
5002 · Meeting facility-internal only	870	855	475	475	-	0%
5030 · Speaker Fees & Expenses	7,465	1,895	505	-	(505)	-
5031 · Speaker Reimb. - Receipt Req'd	741	368	217	-	(217)	-100%
5063 · Special Event Expense	56,773	59,750	32,769	-	(32,769)	-100%
5064 · MCLE Fees Paid	5,347	3,866	6,458	-	(6,458)	-100%
5070 · Equipment Rental	9,149	14,120	33,148	-	(33,148)	-100%
5075 · Food & Bev-external costs only	109,154	96,975	131,941	-	(131,941)	-100%
5076 · Food & beverage - internal only	2,133	2,164	927	927	-	0%
5085 · Misc. Program Expense	227	11	5,050	-	(5,050)	-100%
5702 · Travel - Lodging	18,191	11,933	5,520	-	(5,520)	-100%
5703 · Travel - Transportation/Parking	723	-	2,866	-	(2,866)	-100%
5704 · Travel - Mileage Reimbursement	2,838	5,111	1,243	-	(1,243)	-100%
5960 · Overhead Allocation - Seminars	20,000	20,000	20,000	-	(20,000)	-100%
Total Program Services Expenses	240,660	225,105	241,401	6,692	(234,709)	-97%
Salaries & Benefits						
5510 · Salaries/Wages	20,964	19,252	18,100	1,500	(16,600)	-92%
5605 · Payroll Taxes	1,560	1,442	1,377	129	(1,248)	-91%
5650 · Retirement Plan Contributions	1,784	1,645	1,402	1,402	-	0%
Total Salaries/Benefit Expenses	24,308	22,341	20,887	3,031	(17,856)	-85%
General & Administrative						
4094 · Copy/Print revenue	-	-	-	-	-	#DIV/0!
7025 · Office Supplies	662	620	673	-	(673)	-
7035 · Postage/Mailing, net	7	-	2,563	-	(2,563)	-100%
7040 · Copy/Printing Expense	6,881	12,129	2,425	-	(2,425)	-100%
7045 · Internet Service	-	200	-	-	-	-
7089 · Membership Database Fees	4,000	4,000	4,000	-	(4,000)	-100%
7100 · Telephone	324	96	43	-	(43)	-100%
7140 · Credit Card Merchant Fees	5,700	5,733	4,975	-	(4,975)	-100%
Total General & Administrative Expenses	17,679	22,834	14,679	1	(14,678)	-100%
Total Expenses	284,030	270,280	276,967	9,723	(267,244)	-96%
Net Profit (Loss)	\$ (750)	\$ (19,815)	\$ (58,382)	\$ (9,723)	\$ 48,659	-83%

Utah State Bar
Final FY2020 Budget
Based on Actual Results through 3/31/20
11 - Fall Forum

	Actual FY 2018	Actual FY 2019	Projected FY 2020	Draft Budget FY 2021	\$ Change 2020 Projected vs 2021 Budget	% Change 2020 Projected vs 2021 Budget
Revenue						
4051 · Meeting - Registration	73,178	72,360	73,178	73,178	-	0%
4053 · Meeting - Vendor Revenue	10,150	6,400	4,950	4,950	-	0%
Total Revenue	83,328	78,760	79,903	79,903	-	0%
Expenses						
Program Services						
5001 · Meeting Facility-external only	3,825	525	525	525	-	0%
5002 · Meeting facility-internal only	190	-	235	235	-	0%
5030 · Speaker Fees & Expenses	5,460	1,605	-	-	-	0%
5031 · Speaker Reimb. - Receipt Req'd	387	866	-	-	-	#DIV/0!
5064 · MCLE Fees Paid	3,728	2,920	2,892	2,892	-	0%
5070 · Equipment Rental	6,804	7,501	7,709	7,709	-	0%
5075 · Food & Bev-external costs only	31,850	34,757	38,207	41,853	3,646	10%
5076 · Food & beverage - internal only	304	-	85	85	-	0%
5702 · Travel - Lodging	561	1,408	208	208	-	0%
5960 · Overhead Allocation - Seminars	15,000	15,000	15,000	15,000	-	0%
Total Program Services Expenses	68,108	64,583	64,861	68,507	3,646	6%
Salaries & Benefits						
5510 · Salaries/Wages	9,247	7,291	3,541	3,541	-	0%
5605 · Payroll Taxes	717	549	265	265	-	0%
5650 · Retirement Plan Contributions	672	420	354	354	-	0%
Total Salaries/Benefit Expenses	10,636	8,263	4,160	4,160	-	0%
General & Administrative						
7025 · Office Supplies	-	282	121	121	-	0%
7040 · Copy/Printing Expense	5,006	4,460	4,763	4,763	-	0%
7045 · Internet Service	-	225	175	175	-	0%
7050 · Computer Maintenance	-	50	-	-	-	#DIV/0!
7055 · Computer Supplies & Small Equip	-	273	-	-	-	#DIV/0!
7089 · Membership Database Fees	4,000	4,050	-	-	-	#DIV/0!
7100 · Telephone	198	18	-	-	-	#DIV/0!
7120 · Membership/Dues	-	36	36	36	-	0%
7140 · Credit Card Merchant Fees	1,657	1,978	2,141	2,141	-	0%
Total General & Administrative Expenses	10,862	11,371	7,236	7,236	-	0%
Total Expenses	90,989	84,217	76,257	79,903	3,646	5%
Net Profit (Loss)	\$ (7,662)	\$ (5,457)	\$ 3,646	\$ 0	\$ (3,646)	-100%

Utah State Bar
Final FY2020 Budget
Based on Actual Results through 3/31/20
12 - Spring Convention

	Actual FY 2018	Actual FY 2019	Projected FY 2020	Draft Budget FY 2021	\$ Change 2020 Projected vs 2021 Budget	% Change 2020 Projected vs 2021 Budget
Revenue						
4051 · Meeting - Registration	96,030	127,895	-	97,000	97,000	#DIV/0!
4052 · Meeting - Sponsor Revenue	15,850	13,500	-	15,000	15,000	#DIV/0!
4053 · Meeting - Vendor Revenue	9,600	10,950	-	9,000	9,000	#DIV/0!
4055 · Meeting - Sp Ev Registration	2,046	1,907	-	2,000	2,000	#DIV/0!
Total Revenue	123,526	154,252	-	123,000	123,000	#DIV/0!
Expenses						
Program Services						
5001 · Meeting Facility-external only	7,842	8,005	-	8,000	8,000	#DIV/0!
5002 · Meeting facility-internal only	380	350	285	1,000	715	251%
5031 · Speaker Reimb. - Receipt Req'd	1,988	2,536	(0)	2,000	2,000	-833433%
5063 · Special Event Expense	3,629	2,428	383	3,000	2,617	684%
5064 · MCLE Fees Paid	5,865	5,441	-	9,000	9,000	#DIV/0!
5070 · Equipment Rental	4,804	3,510	-	4,000	4,000	#DIV/0!
5075 · Food & Bev-external costs only	31,727	34,773	16,288	37,249	20,961	129%
5076 · Food & beverage - internal only	988	940	849	1,000	151	18%
5702 · Travel - Lodging	3,303	6,398	2,333	5,000	2,667	114%
5703 · Travel - Transportation/Parking	858	-	337	343	7	2%
5704 · Travel - Mileage Reimbursement	2,953	2,868	345	3,000	2,655	770%
5705 · Travel - Per Diems	413	620	289	500	211	73%
5707 · Travel - Commission Mtgs	-	-	644	-	(644)	-100%
5960 · Overhead Allocation - Seminars	15,000	15,000	-	15,000	15,000	#DIV/0!
Total Program Services Expenses	79,894	82,892	21,753	89,092	67,339	310%
Salaries & Benefits						
5510 · Salaries/Wages	12,537	13,947	9,183	19,523	10,340	113%
5605 · Payroll Taxes	986	1,086	734	1,575	841	115%
5650 · Retirement Plan Contributions	871	1,211	919	1,943	1,024	112%
Total Salaries/Benefit Expenses	14,402	16,256	10,835	23,041	12,206	113%
General & Administrative						
7025 · Office Supplies	163	-	661	1,000	339	51%
7040 · Copy/Printing Expense	5,585	5,349	4,299	5,500	1,201	28%
7089 · Membership Database Fees	4,000	4,000	-	-	-	#DIV/0!
7140 · Credit Card Merchant Fees	2,256	3,398	6,217	3,500	(2,717)	-44%
Total General & Administrative Expenses	12,241	13,007	12,027	10,867	(1,160)	-10%
Total Expenses	107,920	112,155	44,615	123,000	78,385	176%
Net Profit (Loss)	\$ 15,606	\$ 42,097	\$ (44,615)	\$ (0)	\$ 44,615	-100%

Utah State Bar
Final FY2020 Budget
Based on Actual Results through 3/31/20
13 - Bar Journal

	Actual FY 2018	Actual FY 2019	Projected FY 2020	Draft Budget FY 2021	\$ Change 2020 Projected vs 2021 Budget	% Change 2020 Projected vs 2021 Budget
Revenue						
4061 · Advertising Revenue	148,172	185,840	174,001	174,001	-	0%
4062 · Subscriptions	60	90	60	60	-	0%
4071 · Mem Benefits - Lexis	696	1,473	1,327	1,327	-	0%
4072 · Royalty Inc - Bar J, MBNA, LM,M	6,073	6,185	5,590	5,590	-	0%
Total Revenue	155,076	193,588	180,977	180,977	-	0%
Expenses						
Program Services						
5002 · Meeting facility-internal only	1,140	1,045	1,140	1,140	-	0%
5075 · Food & Bev-external costs only	21	213	-	-	-	#DIV/0!
5076 · Food & beverage - internal only	3,209	3,079	2,944	2,944	-	0%
5090 · Commission Expense	28,655	32,683	35,172	35,172	-	0%
Total Program Services Expenses	33,025	37,021	39,255	39,255	-	0%
Salaries & Benefits						
5510 · Salaries/Wages	27,339	27,717	28,646	28,646	-	0%
5605 · Payroll Taxes	1,761	1,904	2,054	2,054	-	0%
5610 · Health Insurance	2,760	2,476	2,766	2,904	138	5%
5620 · Health Ins/Medical Reimb	1	3	2	2	-	0%
5630 · Dental Insurance	214	217	222	233	11	5%
5640 · Life & LTD Insurance	195	194	195	195	-	0%
5650 · Retirement Plan Contributions	2,734	3,025	3,207	3,207	-	0%
5655 · Retirement Plan Fees & Costs	355	331	319	325	6	2%
5660 · Training/Development	175	23	23	23	-	0%
Total Salaries/Benefit Expenses	35,535	35,889	37,432	37,588	156	0%
General & Administrative						
7035 · Postage/Mailing, net	30,149	32,187	33,348	33,348	-	0%
7040 · Copy/Printing Expense	76,117	74,479	79,429	79,429	-	0%
7045 · Internet Service	72	421	350	350	-	0%
7100 · Telephone	557	632	683	683	-	0%
7140 · Credit Card Merchant Fees	898	1,179	1,503	1,503	-	0%
7175 · O/S Consultants	-	280	1,116	1,116	-	0%
Total General & Administrative Expenses	107,793	109,178	116,429	116,429	-	0%
Building Overhead						
6015 · Janitorial Expense	141	177	176	181	5	3%
6020 · Heat	105	122	109	112	3	3%
6025 · Electricity	206	270	265	273	8	3%
6030 · Water/Sewer	24	44	46	47	1	3%
6035 · Outside Maintenance	68	78	95	97	3	3%
6040 · Building Repairs	50	138	121	125	4	3%
6045 · Bldg Mtnce Contracts	182	211	221	228	7	3%
6050 · Bldg Mtnce Supplies	28	31	5	5	0	3%
6065 · Bldg Insurance/Fees	77	102	105	109	3	3%
6070 · Building & Improvements Depre	243	322	324	324	-	0%
6075 · Furniture & Fixtures Depre	73	81	59	59	-	0%
7065 · Computers, Equip & Sftwre Depr	833	1,033	876	876	-	0%
Total Building Overhead Expenses	2,031	2,610	2,402	2,437	34	1%
Total Expenses	178,384	184,698	195,519	195,709	190	0%
Net Profit (Loss)	\$ (23,308)	\$ 8,890	\$ (14,542)	\$ (14,732)	\$ (190)	1%

Utah State Bar
Final FY2020 Budget
Based on Actual Results through 3/31/20
14 - Committees

	Actual FY 2018	Actual FY 2019	Projected FY 2020	Draft Budget FY 2021	\$ Change 2020 Projected vs 2021 Budget	% Change 2020 Projected vs 2021 Budget
Revenue						
4093 · Law Day Revenue	3,570	2,700	2,100	2,100	-	0%
4095 · Miscellaneous Income	40	10	40	40	-	0%
4200 · Seminar Profit/Loss	-	-	154	154	-	0%
Total Revenue	3,610	2,710	2,294	2,294	-	0%
Expenses						
Program Services						
5002 · Meeting facility-internal only	3,205	3,870	3,245	3,245	-	0%
5035 · Awards	-	64	64	64	-	0%
5061 · LRE - Bar Support	65,000	65,000	65,000	60,000	(5,000)	-8%
5062 · Law Day	11,439	7,152	2,500	3,500	1,000	40%
5075 · Food & Bev-external costs only	-	126	135	135	-	0%
5076 · Food & beverage - internal only	4,666	5,818	4,681	4,681	-	0%
5085 · Misc. Program Expense	6	6	-	-	-	#DIV/0!
5703 · Travel - Transportation/Parking	523	334	-	-	-	#DIV/0!
5815 · Commission/Education	-	1,050	-	-	-	#DIV/0!
5866 · Wellbeing Committee	-	18,333	42,310	50,000	7,690	18%
Total Program Services Expenses	84,840	101,753	117,934	121,624	3,690	3%
Salaries & Benefits						
5510 · Salaries/Wages	23,209	23,785	23,371	23,371	-	0%
5605 · Payroll Taxes	1,461	1,361	1,341	1,341	-	0%
5610 · Health Insurance	2,760	2,476	2,766	2,904	138	5%
5620 · Health Ins/Medical Reimb	3	8	4	4	-	0%
5630 · Dental Insurance	214	217	222	233	11	5%
5640 · Life & LTD Insurance	195	194	195	205	10	5%
5650 · Retirement Plan Contributions	2,247	2,154	2,083	2,083	-	0%
5655 · Retirement Plan Fees & Costs	355	331	319	325	6	2%
5660 · Training/Development	75	23	23	23	-	0%
Total Salaries/Benefit Expenses	30,519	30,547	30,322	30,488	166	1%
General & Administrative						
7025 · Office Supplies	38	18	11	11	-	0%
7035 · Postage/Mailing, net	167	408	212	212	-	0%
7040 · Copy/Printing Expense	1,671	1,855	844	844	-	0%
7045 · Internet Service	-	450	700	700	-	0%
7100 · Telephone	577	645	807	807	-	0%
7110 · Publications/Subscriptions	42	-	81	81	-	0%
7175 · O/S Consultants	-	-	465	488	23	5%
Total General & Administrative Expenses	2,494	3,376	3,120	3,143	23	1%
Building Overhead						
6015 · Janitorial Expense	141	177	176	181	5	3%
6020 · Heat	105	122	109	112	3	3%
6025 · Electricity	206	270	265	273	8	3%
6030 · Water/Sewer	24	44	46	47	1	3%
6035 · Outside Maintenance	68	78	95	97	3	3%
6040 · Building Repairs	50	138	121	125	4	3%
6045 · Bldg Mtnce Contracts	182	211	221	228	7	3%
6050 · Bldg Mtnce Supplies	28	31	5	5	0	3%
6065 · Bldg Insurance/Fees	77	102	105	109	3	3%
6070 · Building & Improvements Depre	243	322	324	324	-	0%
6075 · Furniture & Fixtures Depre	73	81	59	59	-	0%
7065 · Computers, Equip & Sftwre Depr	833	1,033	876	876	-	0%
Total Building Overhead Expenses	2,031	2,610	2,402	2,437	34	1%
Total Expenses	119,884	138,285	153,779	157,692	3,913	3%
Net Profit (Loss)	\$ (116,274)	\$ (135,575)	\$ (151,485)	\$ (155,398)	\$ (3,913)	3%

Utah State Bar
Final FY2020 Budget
Based on Actual Results through 3/31/20
15 - Member Benefits

	Actual FY 2018	Actual FY 2019	Projected FY 2020	Draft Budget FY 2021	\$ Change 2020 Projected vs 2021 Budget	% Change 2020 Projected vs 2021 Budget
Revenue						
4072 · Royalty Inc - Bar J, MBNA, LM,M	151	616	987	987	-	0%
4095 · Miscellaneous Income	-	5,000	-	-	-	#DIV/0!
Total Revenue	151	5,616	987	987	-	0%
Expenses						
Program Services						
5047 · Casemaker	71,313	72,584	57,418	52,250	(5,168)	-9%
5099 · Blomquist Hale	73,946	73,832	73,721	73,721	-	0%
Total Program Services Expenses	145,259	146,416	131,139	125,971	(5,168)	-4%
Salaries & Benefits						
5510 · Salaries/Wages	544	293	-	-	-	#DIV/0!
5605 · Payroll Taxes	40	18	-	-	-	#DIV/0!
5650 · Retirement Plan Contributions	54	29	-	-	-	#DIV/0!
Total Salaries/Benefit Expenses	638	340	-	-	-	#DIV/0!
Total Expenses	149,481	146,756	131,139	125,971	(5,168)	-4%
Net Profit (Loss)	\$ (149,330)	\$ (141,140)	\$ (130,151)	\$ (124,983)	\$ 5,168	-4%

Utah State Bar
Final FY2020 Budget
Based on Actual Results through 3/31/20
16 - Section Support

	Actual FY 2018	Actual FY 2019	Projected FY 2020	Draft Budget FY 2021	\$ Change 2020 Projected vs 2021 Budget	% Change 2020 Projected vs 2021 Budget
Revenue						
4010 · Section/Local Bar Support fees	81,844	81,809	83,244	83,244	-	0%
Total Revenue	81,844	81,809	83,244	83,244	-	0%
Expenses						
Program Services						
5002 · Meeting facility-internal only	160	-	-	-	-	#DIV/0!
5076 · Food & beverage - internal only	757	-	-	-	-	#DIV/0!
5703 · Travel - Transportation/Parking	4	6	-	-	-	#DIV/0!
Total Program Services Expenses	921	6	-	-	-	#DIV/0!
Salaries & Benefits						
5510 · Salaries/Wages	49,251	50,386	41,523	41,523	-	0%
5605 · Payroll Taxes	3,991	4,079	3,277	3,277	-	0%
5610 · Health Insurance	4,193	9,176	10,220	10,731	511	5%
5620 · Health Ins/Medical Reimb	56	44	-	-	-	#DIV/0!
5630 · Dental Insurance	429	398	444	466	22	5%
5640 · Life & LTD Insurance	317	268	295	310	15	5%
5650 · Retirement Plan Contributions	3,844	1,189	2,492	2,492	-	0%
5655 · Retirement Plan Fees & Costs	526	174	313	319	6	2%
5660 · Training/Development	250	45	45	45	-	0%
Total Salaries/Benefit Expenses	62,857	65,758	58,609	59,163	554	1%
General & Administrative						
7040 · Copy/Printing Expense	21	375	-	-	-	#DIV/0!
7045 · Internet Service	2,907	3,147	-	-	-	#DIV/0!
7050 · Computer Maintenance	941	945	981	1,030	49	5%
7100 · Telephone	1,115	1,263	1,366	1,366	-	0%
7175 · O/S Consultants	-	280	1,580	1,659	79	5%
Total General & Administrative Expenses	5,102	6,011	3,927	4,055	128	3%
Building Overhead						
6015 · Janitorial Expense	209	229	231	238	7	3%
6020 · Heat	152	158	144	148	4	3%
6025 · Electricity	306	350	347	357	10	3%
6030 · Water/Sewer	37	58	60	62	2	3%
6035 · Outside Maintenance	92	101	127	131	4	3%
6040 · Building Repairs	71	178	159	164	5	3%
6045 · Bldg Mtnce Contracts	269	274	290	299	9	3%
6050 · Bldg Mtnce Supplies	39	40	6	6	0	3%
6055 · Real Property Taxes	11,162	9,052	8,629	8,888	259	3%
6060 · Personal Property Taxes	147	132	126	130	4	3%
6065 · Bldg Insurance/Fees	114	133	138	143	4	3%
6070 · Building & Improvements Depre	359	416	426	426	-	0%
6075 · Furniture & Fixtures Depre	108	105	78	78	-	0%
7065 · Computers, Equip & Sftwre Depr	1,226	1,338	1,150	1,150	-	0%
Total Building Overhead Expenses	14,292	12,564	11,913	12,221	308	3%
Total Expenses	83,172	84,339	74,449	75,439	990	1%
Net Profit (Loss)	\$ (1,328)	\$ (2,530)	\$ 8,795	\$ 7,805	\$ (990)	-11%

Utah State Bar
Final FY2020 Budget
Based on Actual Results through 3/31/20
17 - Consumer Assistance

	Actual FY 2018	Actual FY 2019	Projected FY 2020	Draft Budget FY 2021	\$ Change 2020 Projected vs 2021 Budget	% Change 2020 Projected vs 2021 Budget
Revenue						
Expenses						
Program Services						
5704 · Travel - Mileage Reimbursement	36	17	-	-	-	#DIV/0!
Total Program Services Expenses	36	17	-	-	-	#DIV/0!
Salaries & Benefits						
5510 · Salaries/Wages	93,608	93,223	98,142	98,142	-	0%
5605 · Payroll Taxes	6,180	6,396	6,674	6,674	-	0%
5610 · Health Insurance	10,396	11,184	11,304	11,869	565	5%
5630 · Dental Insurance	429	433	444	466	22	5%
5640 · Life & LTD Insurance	603	600	602	633	30	5%
5650 · Retirement Plan Contributions	9,008	9,221	9,529	9,529	-	0%
5655 · Retirement Plan Fees & Costs	710	663	637	650	13	2%
5660 · Training/Development	670	45	280	280	-	0%
Total Salaries/Benefit Expenses	121,603	121,764	127,612	128,243	630	0%
General & Administrative						
7025 · Office Supplies	228	253	349	349	-	0%
7035 · Postage/Mailing, net	358	283	338	338	-	0%
7040 · Copy/Printing Expense	31	21	21	21	-	0%
7055 · Computer Supplies & Small Equip	-	27	-	-	-	#DIV/0!
7100 · Telephone	3,049	3,626	3,163	3,163	-	0%
7120 · Membership/Dues	555	595	615	615	-	0%
7175 · O/S Consultants	-	280	1,580	1,659	79	5%
Total General & Administrative Expenses	4,220	5,086	6,067	6,146	79	1%
Building Overhead						
6015 · Janitorial Expense	344	205	207	213	6	3%
6020 · Heat	231	141	129	132	4	3%
6025 · Electricity	503	313	310	319	9	3%
6030 · Water/Sewer	65	51	54	55	2	3%
6035 · Outside Maintenance	105	91	113	117	3	3%
6040 · Building Repairs	101	159	142	146	4	3%
6045 · Bldg Mtnce Contracts	441	244	259	267	8	3%
6050 · Bldg Mtnce Supplies	47	36	6	6	0	3%
6065 · Bldg Insurance/Fees	187	118	124	127	4	3%
6070 · Building & Improvements Depre	585	372	380	380	-	0%
6075 · Furniture & Fixtures Depre	176	93	69	69	-	0%
7065 · Computers, Equip & Sftwre Depr	1,974	1,195	1,027	1,027	-	0%
Total Building Overhead Expenses	4,759	3,018	2,819	2,859	40	1%
Total Expenses	130,618	129,886	136,498	137,248	750	1%
Net Profit (Loss)	\$ (130,618)	\$ (129,886)	\$ (136,498)	\$ (137,248)	\$ (750)	1%

Utah State Bar
Final FY2020 Budget
Based on Actual Results through 3/31/20
18 - Access to Justice

	Actual FY 2018	Actual FY 2019	Projected FY 2020	Draft Budget FY 2021	\$ Change 2020 Projected vs 2021 Budget	% Change 2020 Projected vs 2021 Budget
Revenue						
4063 · Modest Means revenue	11,200	10,725	11,600	11,600	-	0%
4120 · Grant Income	-	55,219	58,219	36,812	(21,407)	-37%
4200 · Seminar Profit/Loss	(487)	-	850	850	-	0%
Total Revenue	10,713	65,944	70,669	49,262	(21,407)	-30%
Expenses						
Program Services						
5002 · Meeting facility-internal only	2,470	2,938	1,555	1,555	-	0%
5031 · Speaker Reimb. - Receipt Req'd	-	-	367	374	7	2%
5035 · Awards	-	48	-	-	-	#DIV/0!
5037 · Grants/ contributions - general	4,000	1,000	1,000	1,000	-	0%
5075 · Food & Bev-external costs only	2,338	2,701	1,703	2,300	597	35%
5076 · Food & beverage - internal only	5,826	6,895	6,773	7,000	227	3%
5085 · Misc. Program Expense	-	113	-	100	100	#DIV/0!
5702 · Travel - Lodging	1,460	1,519	1,435	-	(1,435)	-100%
5703 · Travel - Transportation/Parking	822	785	862	-	(862)	-100%
5704 · Travel - Mileage Reimbursement	1,366	1,157	121	-	(121)	-100%
5705 · Travel - Per Diems	162	215	215	-	(215)	-100%
5706 · Travel - Meals	153	-	-	-	-	#DIV/0!
Total Program Services Expenses	18,598	17,371	14,030	12,329	(1,701)	-12%
Salaries & Benefits						
5510 · Salaries/Wages	86,966	100,595	141,665	141,665	-	0%
5605 · Payroll Taxes	6,997	8,347	11,984	11,984	-	0%
5610 · Health Insurance	7,388	7,300	11,528	12,104	576	5%
5620 · Health Ins/Medical Reimb	1,074	1,908	227	227	-	0%
5630 · Dental Insurance	787	793	1,112	1,167	56	5%
5640 · Life & LTD Insurance	678	694	1,080	1,134	54	5%
5650 · Retirement Plan Contributions	3,609	5,737	2,636	12,167	9,530	362%
5655 · Retirement Plan Fees & Costs	353	827	489	489	-	0%
5660 · Training/Development	2,450	640	1,385	1,385	-	0%
Total Salaries/Benefit Expenses	110,302	126,842	172,106	182,322	10,216	6%
General & Administrative						
7025 · Office Supplies	1,058	486	455	455	-	0%
7035 · Postage/Mailing, net	178	158	88	88	-	0%
7040 · Copy/Printing Expense	3,292	1,153	1,014	1,014	-	0%
7050 · Computer Maintenance	8,483	8,491	8,561	8,989	428	5%
7089 · Membership Database Fees	683	-	-	-	-	#DIV/0!
7100 · Telephone	2,929	2,588	3,041	3,041	-	0%
7105 · Advertising	75	150	315	315	-	0%
7110 · Publications/Subscriptions	-	37	-	-	-	#DIV/0!
7120 · Membership/Dues	405	375	434	434	-	0%
7140 · Credit Card Merchant Fees	449	462	459	459	-	0%
7150 · E&O/Off & Dir Insurance	14,253	14,327	14,441	14,441	-	0%
7175 · O/S Consultants	-	561	5,557	5,834	278	5%
Total General & Administrative Expenses	32,445	29,029	35,605	36,336	731	2%
Building Overhead						
6015 · Janitorial Expense	773	661	668	688	20	3%
6020 · Heat	541	456	416	428	12	3%
6025 · Electricity	1,132	1,011	1,002	1,032	30	3%
6030 · Water/Sewer	142	166	173	178	5	3%
6035 · Outside Maintenance	291	293	366	377	11	3%
6040 · Building Repairs	247	514	459	473	14	3%
6045 · Bldg Mtnce Contracts	994	790	838	864	25	3%
6050 · Bldg Mtnce Supplies	125	116	18	18	1	3%
6065 · Bldg Insurance/Fees	422	383	400	412	12	3%
6070 · Building & Improvements Depre	1,323	1,202	1,229	1,229	-	0%
6075 · Furniture & Fixtures Depre	399	302	224	224	-	0%
7065 · Computers, Equip & Sftwre Depr	4,493	3,864	3,321	3,321	-	0%
Total Building Overhead Expenses	10,883	9,758	9,114	9,244	130	1%
Total Expenses	172,228	183,001	230,855	240,231	9,376	4%
Net Profit (Loss)	\$ (161,515)	\$ (117,057)	\$ (160,186)	\$ (190,969)	\$ (30,783)	19%

Utah State Bar
Final FY2020 Budget
Based on Actual Results through 3/31/20
19 - Tuesday Night Bar

	Actual FY 2018	Actual FY 2019	Projected FY 2020	Draft Budget FY 2021	\$ Change 2020 Projected vs 2021 Budget	% Change 2020 Projected vs 2021 Budget
Expenses						
Program Services						
5002 · Meeting facility-internal only	26,999	25,271	26,651	26,651	-	0%
5075 · Food & Bev-external costs only	452	429	616	616	-	0%
5076 · Food & beverage - internal only	1,156	350	1,070	1,070	-	0%
5085 · Misc. Program Expense	4,518	4,800	4,578	4,578	-	0%
Total Program Services Expenses	33,125	30,851	32,915	32,915	-	0%
Salaries & Benefits						
5510 · Salaries/Wages	2,508	2,354	3,623	3,623	-	0%
5605 · Payroll Taxes	206	199	306	306	-	0%
5620 · Health Ins/Medical Reimb	32	54	5	5	-	0%
5650 · Retirement Plan Contributions	110	168	35	370	335	962%
Total Salaries/Benefit Expenses	2,856	2,775	3,969	4,304	335	8%
General & Administrative						
7025 · Office Supplies	-	5	4	4	0	
7110 · Publications/Subscriptions	714	743	773	788	15	2%
Total General & Administrative Expenses	714	748	1,444	1,473	29	2%
Total Expenses	36,695	34,373	38,328	38,692	364	1%
Net Profit (Loss)	\$ (36,695)	\$ (34,373)	\$ (38,328)	\$ (38,692)	\$ (364)	1%

Utah State Bar
Final FY2020 Budget
Based on Actual Results through 3/31/20
20 - Legislative

	Actual FY 2018	Actual FY 2019	Projected FY 2020	Draft Budget FY 2021	\$ Change 2020 Projected vs 2021 Budget	% Change 2020 Projected vs 2021 Budget
Expenses						
Program Services						
5002 · Meeting facility-internal only	1,880	1,360	1,350	1,350	-	0%
5055 · Legislative Expense	44,126	47,505	57,072	60,000	2,928	5%
5070 · Equipment Rental	-	-	269	269	-	
5075 · Food & Bev-external costs only	-	2,116	1,981	1,981	-	0%
5076 · Food & beverage - internal only	5,162	3,329	3,474	3,474	-	0%
5702 · Travel - Lodging	-	681	681	-	(681)	-100%
5703 · Travel - Transportation/Parking	-	1,099	969	-	(969)	-100%
5706 · Travel - Meals	-	270	270	-	(270)	-100%
5820 · ABA Annual Delegate	-	1,938	-	-	-	#DIV/0!
Total Program Services Expenses	51,168	58,298	66,066	67,074	1,008	2%
Salaries & Benefits						
5510 · Salaries/Wages	1,810	7,317	5,480	5,480	-	0%
5605 · Payroll Taxes	133	582	267	267	-	0%
5620 · Health Ins/Medical Reimb	2	2	-	-	-	#DIV/0!
5650 · Retirement Plan Contributions	163	724	534	534	-	0%
Total Salaries/Benefit Expenses	2,108	8,624	6,281	6,281	-	0%
General & Administrative						
7100 · Telephone	-	80	86	87	2	2%
7170 · Lobbying Rebates	7	180	201	205	4	2%
Total General & Administrative Expenses	7	260	287	293	6	2%
Total Expenses	53,283	67,182	72,634	73,648	1,014	1%
Net Profit (Loss)	\$ (53,283)	\$ (67,182)	\$ (72,634)	\$ (73,648)	\$ (1,014)	1%

Utah State Bar
Final FY2020 Budget
Based on Actual Results through 3/31/20
21 - Commission/Sp Projects

	Actual FY 2018	Actual FY 2019	Projected FY 2020	Draft Budget FY 2021	\$ Change 2020 Projected vs 2021 Budget	% Change 2020 Projected vs 2021 Budget
Expenses						
Program Services						
5001 · Meeting Facility-external only	512	1,002	-	-	-	#DIV/0!
5002 · Meeting facility-internal only	4,975	3,595	4,710	4,710	-	0%
5030 · Speaker Fees & Expenses	-	250	-	-	-	#DIV/0!
5035 · Awards	1,144	2,068	2,685	2,685	-	0%
5037 · Grants/ contributions - general	1,600	2,170	1,000	1,000	-	0%
5063 · Special Event Expense	697	1,288	1,686	-	(1,686)	-100%
5070 · Equipment Rental	296	1,139	-	-	-	#DIV/0!
5075 · Food & Bev-external costs only	22,819	13,827	15,164	8,000	(7,164)	-47%
5076 · Food & beverage - internal only	9,314	8,675	9,757	2,000	(7,757)	-80%
5085 · Misc. Program Expense	-	-	-	-	-	
5702 · Travel - Lodging	6,377	2,132	8,308	-	(8,308)	-100%
5703 · Travel - Transportation/Parking	1,393	2,565	3,476	-	(3,476)	-100%
5704 · Travel - Mileage Reimbursement	185	2,784	3,299	-	(3,299)	-100%
5705 · Travel - Per Diems	2,297	556	330	-	(330)	-100%
5707 · Travel - Commission Mtgs	39,223	54,457	15,833	2,500	(13,333)	-84%
5805 · ABA Annual Meeting	1,567	3,901	4,788	-	(4,788)	-100%
5810 · ABA Mid Year Meeting	8,760	2,872	5,655	-	(5,655)	-100%
5815 · Commission/Education	23,165	22,680	20,530	2,350	(18,180)	-89%
5820 · ABA Annual Delegate	15,784	8,343	7,516	-	(7,516)	-100%
5830 · Western States Bar Conference	6,076	17,507	13,000	-	(13,000)	-100%
5840 · President's Expense	19,687	20,403	25,567	20,000	(5,567)	-22%
5841 · President's Reimbursement	5,554	1,594	3,532	3,532	-	0%
5845 · Reg Reform Task Force	-	6,012	4,671	-	(4,671)	-100%
5850 · Leadership Academy	12,400	12,471	20,000	10,000	(10,000)	-50%
5855 · Bar Review	2,219	1,729	931	-	(931)	-100%
5865 · Retreat	34,356	31,293	20,118	5,000	(15,118)	-75%
5867 · Bar Membership Survey	-	-	50,000	-	(50,000)	0%
5868 · UCLI Support	-	-	50,000	-	(50,000)	0%
Total Program Services Expenses	220,758	225,432	292,677	61,897	(230,780)	-79%
Salaries & Benefits						
5510 · Salaries/Wages	1,500	755	845	845	-	0%
5605 · Payroll Taxes	114	61	68	68	-	0%
5620 · Health Ins/Medical Reimb	5	11	6	6	-	0%
5650 · Retirement Plan Contributions	103	45	56	56	-	0%
Total Salaries/Benefit Expenses	1,723	872	975	975	-	0%
General & Administrative						
7025 · Office Supplies	377	161	-	-	-	#DIV/0!
7035 · Postage/Mailing, net	138	381	310	310	-	0%
7040 · Copy/Printing Expense	4,092	2,007	5,000	5,000	-	0%
7045 · Internet Service	1,458	1,073	1,642	1,642	-	0%
7100 · Telephone	253	203	383	383	-	0%
7145 · Commission Election Expense	3,256	1,912	2,699	2,699	-	0%
7150 · E&O/Off & Dir Insurance	5,112	5,292	5,292	5,292	-	0%
7195 · Other Gen & Adm Expense	1,134	638	1,328	1,328	-	0%
Total General & Administrative Expenses	15,819	11,666	16,679	16,679	-	0%
Total Expenses	238,300	237,970	310,331	79,551	(230,780)	-74%
Net Profit (Loss)	\$ (238,977)	\$ (238,520)	\$ (310,947)	\$ (79,551)	\$ 231,397	-74%

Utah State Bar
Final FY2020 Budget
Based on Actual Results through 3/31/20
22 - Public Education

	Actual FY 2018	Actual FY 2019	Projected FY 2020	Draft Budget FY 2021	\$ Change 2020 Projected vs 2021 Budget	% Change 2020 Projected vs 2021 Budget
Expenses						
Program Services						
5062 · Law Day	-	3,600	-	-	-	#DIV/0!
5075 · Food & Bev-external costs only	285	24	-	-	-	#DIV/0!
5076 · Food & beverage - internal only	-	-	737	737	-	0%
5702 · Travel - Lodging	-	581	612	-	(612)	-100%
5703 · Travel - Transportation/Parking	-	416	378	-	(378)	-100%
5704 · Travel - Mileage Reimbursement	-	1,163	981	-	(981)	-100%
5705 · Travel - Per Diems	-	165	184	-	(184)	-100%
Total Program Services Expenses	285	5,950	2,891	737	(2,154)	-75%
Salaries & Benefits						
5510 · Salaries/Wages	49,457	63,300	64,626	64,626	-	0%
5605 · Payroll Taxes	3,930	4,836	5,036	5,036	-	0%
5610 · Health Insurance	4,204	6,690	7,384	7,753	369	5%
5620 · Health Ins/Medical Reimb	600	1,189	900	900	-	0%
5630 · Dental Insurance	279	433	444	466	22	5%
5640 · Life & LTD Insurance	307	450	453	475	23	5%
5650 · Retirement Plan Contributions	-	4,528	6,276	6,276	-	0%
5655 · Retirement Plan Fees & Costs	-	489	637	650	13	2%
5660 · Training/Development	250	440	340	347	7	2%
Total Salaries/Benefit Expenses	59,028	82,355	86,096	86,529	434	1%
General & Administrative						
7025 · Office Supplies	211	-	-	-	-	#DIV/0!
7035 · Postage/Mailing, net	10	1	-	-	-	#DIV/0!
7040 · Copy/Printing Expense	2,310	2,059	1,331	1,331	-	0%
7045 · Internet Service	1,188	1,188	1,089	1,089	-	0%
7055 · Computer Supplies & Small Equip	105	-	364	382	18	5%
7100 · Telephone	1,115	1,263	1,366	1,366	-	0%
7105 · Advertising	45,605	53,110	73,000	-	(73,000)	-100%
7106 · Public Notification	-	-	-	-	-	#DIV/0!
7107 · Production Costs	-	-	500	500	-	0%
7110 · Publications/Subscriptions	721	1,116	1,433	1,433	-	0%
7115 · Public Relations	50,280	-	50,000	-	(50,000)	-100%
7120 · Membership/Dues	135	135	135	135	-	0%
7175 · O/S Consultants	500	280	913	2,360	1,447	158%
7195 · Other Gen & Adm Expense	-	592	-	-	-	#DIV/0!
Total General & Administrative Expenses	102,179	63,053	134,279	12,826	(121,452)	-90%
Building Overhead						
6015 · Janitorial Expense	333	354	352	363	11	3%
6020 · Heat	241	244	218	224	7	3%
6025 · Electricity	488	541	530	546	16	3%
6030 · Water/Sewer	59	89	92	95	3	3%
6035 · Outside Maintenance	144	157	189	195	6	3%
6040 · Building Repairs	113	275	243	250	7	3%
6045 · Bldg Mtnce Contracts	430	423	443	456	13	3%
6050 · Bldg Mtnce Supplies	61	62	10	10	0	3%
6065 · Bldg Insurance/Fees	183	205	211	217	6	3%
6070 · Building & Improvements Depre	573	643	648	648	-	0%
6075 · Furniture & Fixtures Depre	173	161	119	119	-	0%
7065 · Computers, Equip & Sftwre Depr	1,955	2,067	1,752	1,752	-	0%
Total Building Overhead Expenses	4,754	5,220	4,805	4,873	69	1%
Total Expenses	166,246	156,577	228,070	104,966	(123,104)	-54%
Net Profit (Loss)	\$ (166,246)	\$ (156,577)	\$ (228,070)	\$ (104,966)	\$ 123,104	-54%

Utah State Bar
Final FY2020 Budget
Based on Actual Results through 3/31/20
23 - Young Lawyers Division

	Actual FY 2018	Actual FY 2019	Projected FY 2020	Draft Budget FY 2021	\$ Change 2020 Projected vs 2021 Budget	% Change 2020 Projected vs 2021 Budget
Revenue						
4200 · Seminar Profit/Loss	3,897	8,318	8,318	6,000	(2,318)	-28%
Total Revenue	6,365	8,908	8,486	6,000	(2,486)	-29%
Expenses						
Program Services						
5001 · Meeting Facility-external only	1,000	2,700	787	787	-	0%
5002 · Meeting facility-internal only	240	80	160	160	-	0%
5035 · Awards	1,841	-	58	58	-	0%
5037 · Grants/ contributions - general	3,100	5,670	4,670	4,670	-	0%
5060 · Program Special Activities	-	-	2,595	2,595	-	0%
5062 · Law Day	900	900	900	900	-	0%
5063 · Special Event Expense	2,979	2,285	7,000	2,000	(5,000)	-71%
5070 · Equipment Rental	-	-	45	45	-	0%
5075 · Food & Bev-external costs only	18,512	21,541	15,000	10,000	(5,000)	-33%
5076 · Food & beverage - internal only	20	330	-	-	-	#DIV/0!
5085 · Misc. Program Expense	1,069	124	561	561	-	0%
5095 · Wills for Heroes	1,676	450	707	707	-	0%
5702 · Travel - Lodging	7,046	6,190	5,000	-	(5,000)	-100%
5703 · Travel - Transportation/Parking	1,922	2,826	5,000	-	(5,000)	-100%
5704 · Travel - Mileage Reimbursement	2,062	341	252	-	(252)	-100%
5706 · Travel - Meals	675	936	734	-	(734)	-100%
5805 · ABA Annual Meeting	3,776	5,119	5,000	-	(5,000)	-100%
5810 · ABA Mid Year Meeting	4,263	3,033	6,000	-	(6,000)	-100%
5815 · Commission/Education	1,168	2,329	1,500	-	(1,500)	-100%
5820 · ABA Annual Delegate	500	-	1,766	-	(1,766)	-100%
5865 · Retreat	3,072	-	5,000	-	(5,000)	-100%
Total Program Services Expenses	56,196	54,854	62,735	22,483	(40,252)	-64%
General & Administrative						
7025 · Office Supplies	31	378	10	10	-	0%
7040 · Copy/Printing Expense	1,967	7	1,602	1,602	-	0%
7055 · Computer Supplies & Small Equip	612	-	-	-	-	#DIV/0!
7105 · Advertising	400	565	165	165	-	0%
7110 · Publications/Subscriptions	198	881	883	883	-	0%
7120 · Membership/Dues	146	-	-	-	-	#DIV/0!
7195 · Other Gen & Adm Expense	220	2,826	2,979	2,979	-	0%
Total General & Administrative Expenses	3,574	4,657	5,640	5,640	-	0%
Total Expenses	60,603	59,567	68,375	28,122	(40,252)	-59%
Net Profit (Loss)	\$ (54,238)	\$ (50,659)	\$ (59,889)	\$ (22,122)	\$ 37,766	-63%

Utah State Bar
Final FY2020 Budget
Based on Actual Results through 3/31/20
24 - Licensed Paralegal Practit

	Actual FY 2018	Actual FY 2019	Projected FY 2020	Draft Budget FY 2021	\$ Change 2020 Projected vs 2021 Budget	% Change 2020 Projected vs 2021 Budget
Revenue						
4011 · Admissions LPP	-	950	3,250	3,250	-	0%
Total Revenue	-	950	3,250	3,250	-	0%
Expenses						
Program Services						
5002 · Meeting facility-internal only	-	-	95	97	2	2%
5014 · Questions	36,700	-	36,500	36,500	-	0%
Total Program Services Expenses	37,228	-	36,595	36,597	2	0%
Salaries & Benefits						
5510 · Salaries/Wages	8,827	20,186	10,000	40,000	30,000	300%
5605 · Payroll Taxes	740	1,671	1,000	3,200	2,200	220%
5610 · Health Insurance	-	-	-	4,740	4,740	#DIV/0!
5630 · Dental Insurance	-	-	-	450	450	#DIV/0!
5640 · Life & LTD Insurance	-	-	-	312	312	#DIV/0!
5650 · Retirement Plan Contributions	35	1,556	1,927	4,000	2,073	108%
5655 · Retirement Plan Fees & Costs	-	-	-	624	624	#DIV/0!
Total Salaries/Benefit Expenses	9,601	23,413	12,927	53,326	40,399	313%
General & Administrative						
7100 · Telephone	-	-	161	161	-	0%
7105 · Advertising	-	-	-	10,995	10,995	#DIV/0!
Total General & Administrative Expenses	4	-	7,901	19,051	11,150	141%
Building Overhead						
6015 · Janitorial Expense	-	-	44	45	1	3%
6020 · Heat	-	-	37	38	1	3%
6025 · Electricity	-	-	50	51	1	3%
6030 · Water/Sewer	-	-	6	6	0	3%
6035 · Outside Maintenance	-	-	56	57	2	3%
6040 · Building Repairs	-	-	23	24	1	3%
6045 · Bldg Mtnce Contracts	-	-	48	49	1	3%
6065 · Bldg Insurance/Fees	-	-	26	27	1	3%
6070 · Building & Improvements Depre	-	-	78	78	-	0%
6075 · Furniture & Fixtures Depre	-	-	13	13	-	0%
7065 · Computers, Equip & Sftwre Depr	-	-	202	202	-	0%
Total Building Overhead Expenses	-	-	582	591	9	1%
Total Expenses	46,833	23,413	58,005	109,565	51,559	89%
Net Profit (Loss)	\$ (46,833)	\$ (22,463)	\$ (54,755)	\$ (106,315)	\$ (51,559)	94%

TAB 4

The Awards Committee just met via telephone conference. They recommend the following:

- | | |
|-------------------------------------|--|
| 1. 2020 Dorathy Merrill Brothers | <i>To be given at either the 2020 Fall Forum or the 2021 Spring Convention – award recipient's choice.</i> |
| 2. 2020 Raymond S. Uno | <i>To be given at either the 2020 Fall Forum or the 2021 Spring Convention – award recipient's choice.</i> |
| 3. Judge of the Year | <i>To be given at the 2020 Fall Forum</i> |
| 4. Lawyer of the Year | <i>To be given at the 2020 Fall Forum</i> |
| 5. Professionalism | <i>To be given at the 2020 Fall Forum</i> |
| 6. Section of the Year | <i>To be given at the 2021 Spring Convention</i> |
| 7. Committee of the Year | <i>To be given at the 2021 Spring Convention</i> |
| 8. Charlotte Miller Mentoring Award | <i>To be given at the 2021 Spring Convention</i> |
| 9. James Lee Mentoring Award | <i>To be given at the 2021 Spring Convention</i> |
| 10. Paul Moxley Mentoring Award | <i>To be given at the 2021 Spring Convention</i> |
| 11. 2021 Dorathy Merrill Brothers | <i>To be given at the 2021 Spring Convention</i> |
| 12. 2021 Raymond S. Uno | <i>To be given at the 2021 Spring Convention</i> |

The Award Committee further recommended that the awards to be presented at the 2021 Spring Convention be divided in half with the first half to be given at the Friday Session and the second half at the Saturday Session.

TAB 5

Utah State Bar®

M E M O R A N D U M

TO: Board of Bar Commissioners
FROM: Elizabeth A. Wright 
RE: Proposed Changes to Update and Conform Board Election Rules
DATE: May 14, 2020

Attached are proposed changes to Rules 14-205 and 14-206 for approval by the Board. The changes conform and update Bar election procedures, remove obsolete procedures, use plain language, and use “lawyer licensee” instead of “member.” Both rules are part of the Bar’s bylaws and are published in the Supreme Court Rules of Professional Practice in the chapter governing the Utah State Bar. Rule 14-205 governs the Board, Board elections and terms, removals, vacancies, meetings, voting, and selection of the executive director. Rules 14-206 governs Board Officers, election and terms, vacancies, and removal.

The rules have been updated to reflect that the Bar conducts electronic voting. The changes remove references to fax machines, mailed ballots with cover and interior envelopes, and the selection of representatives to oversee ballot counting. Updates reflect that ballots are sent to lawyer email addresses of record with the Bar and are due by 9:59 p.m. Mountain Time on the day the election closes. The 9:59 p.m. time is the closure time used by our electronic voting program. Updated language also states that ballots are due the “date the election closes” as opposed to the date “on which ballots are counted.”

All references to “bar members” have been changed to “lawyer licensees.” Use of the term “lawyer licensee” better reflects the Bar’s role as an administrator of lawyer licensing rather than as a voluntary association connotated by the use of “member.” Use of “licensee” also conforms to the language the Court is using in other rules. For instance, the OPC rules are being changed to use the word “licensee” or “legal professional” rather than member.

In Rule 14-205, section (o) has been updated to reflect the procedure the Board uses to contract with the Executive Director. “Executive Director” has been capitalized throughout to be consistent with other rules and the Policies and Procedures. The Court is removing all “shalls” from rules and replacing them with “musts” and “wills.” All “shalls” have been removed throughout the rules and flowery, past tense language has been removed and made present tense.

Rule 14-205. Board.

(a) Number and terms. There ~~shall~~must be a Board consisting of no fewer than 13 but no more than 15 voting members, including 11 elected lawyers and two non-lawyers appointed by the Supreme Court. Except as otherwise provided, the term of office of each commissioner ~~shall be~~is three years and until a successor is elected and qualified.

(b) Vacancies. A lawyer vacancy on the Board occurs by reason of death, resignation, incapacity, retirement, removal, change of residence from Utah, or upon the incumbent ceasing to be an active ~~lawyer member of the Bar licensee~~ in good standing. A vacancy created by a lawyer commissioner ~~shall~~will be filled by the remaining Board members by either:

(b)(1) conducting a special election;

(b)(2) appointing a successor from among the active ~~lawyer members of the Bar licensees~~ whose business mailing addresses on the records of the Bar are in the division from which the commissioner was elected, who ~~shall~~will serve until the following annual election; or

(b)(3) filling the vacancy through the next regular annual election.

The Board may establish the term of the successor to be either a one, two or full three-year term, provided that there would be not more than three but not fewer than two commissioners from the Third Division whose terms expire in any one year and not more than five but not fewer than four commissioners on the Board whose terms expire in any one year.

(b)(4) A President's unexpired Commission term ~~shall~~will be filled in the regular election cycle immediately preceding the time he or she succeeds to the office of President.

(c) Removal. A lawyer commissioner may be removed from the Board by:

(c)(1) The vote of eight of the twelve commissioners (other than the commissioner proposed for removal) at a meeting of which advance notice of the removal vote is given as provided in paragraph 14-204(a)(2), provided that commissioners who are eligible to vote but who are not in attendance at the meeting may submit their vote in writing to the executive director; or

(c)(2) The vote of a majority of the active ~~lawyer members of the Bar licensees~~ in the division which elected the commissioner voting in a special election held for the purpose of consideration of removal. Ballots ~~shall~~will be emailed to the lawyer licensees' address of record with the Bar, first class, 20 days after the filing of a petition calling for removal signed by 10% of the active ~~members of the Bar~~ lawyer licensees in the division which elected the

commissioner. Ballots ~~shall beare~~ due by 9:59 p.m. Mountain Time 17-15 days after emailing and the results tabulated and announced not more than 45 days after the filing of the petition.

(d) General powers. The Board may exercise all powers necessary and proper to carry out the duties and responsibilities of the Bar and the purposes of Article 1, Integration and Management, and ~~shall may~~ exercise all authority which is not specifically reserved to the Supreme Court.

(e) Election notice. Notice of election of commissioners and of the divisions from which they ~~shall will~~ be elected during the current year ~~shall will~~ be emailed to the active ~~members-lawyer licnesees~~ of the Bar in that division no later than 90 days prior to the date ~~on which ballots will be counted~~ the election closes.

(f) Nomination. Commissioners ~~shall be~~ are nominated by written petition complying with Article 1, Integration and Management, and filed with the executive director at least 60 days prior to the date ~~on which ballots will be counted~~ the election closes. ~~Such The~~ petitions must be signed by ten active ~~lawyer members of the Bar licensees~~ whose business mailing addresses on the records of the Bar are in the division from which the election is to be held. Only active ~~members of the Bar~~ lawyer licensees eligible to vote in that division may be nominated to serve as commissioner.

(g) Form of petition. The executive director ~~shall will~~ prepare a form of petition for the nomination of commissioners and ~~shall~~ furnish copies to any active ~~member~~ lawyer licensee upon request. Nominations may be made on ~~such the~~ forms, but nominations in any other form of petition which complies with Article 1, Integration and Management and these Bylaws ~~shall will~~ be ~~deemed~~ sufficient.

(h) Election procedures.

(h)(1) Ballots ~~shall will~~ be provided to all active ~~lawyer members licensees~~ in each division in which an election is to be held, containing the alphabetized names of those ~~members-lawyer licensees~~ who have been nominated from the respective divisions. ~~Said The~~ ballots ~~shall will~~ be provided electronically, ~~and if by mail, mailed~~ to active ~~members-lawyer licensees~~ at their ~~business mailing email of record with the Bar~~ address in the respective divisions at least 15 days prior to the date ~~on which ballots will be counted~~ the election closes.

~~(h)(2) The ballot, together with a ballot envelope and a cover envelope in which the voting member shall identify himself or herself, shall be included in the mailing.~~

~~(h)(3) Ballots shall state the date upon which they are due and shall must be returned so as to reach the Bar offices, whether by mail, in person or~~

submitted electronically no later than 5:00:59 p.m. Mountain Time on the day prior to the date ballots will be counted. Balloting shall close at 5:00 p.m. the election closes.

(h)(4) The executive director shall designate the time, date and place for the counting of ballots, and shall arrange for the counting for those ballots not cast electronically.

(h)(5) Each candidate for a Board position may submit in writing the names of two persons to act as ballot counters, and arrange to have counters at the Bar offices or such other place as the executive director shall determine on the date and time for counting ballots.

(h)(6) Successful candidates shall will be notified of that fact by the president Executive Director. who shall then The President must call a meeting of the Board prior to the end of the annual meeting for the purpose of re-organizing the Board. Public announcement of election results shall will be made at the discretion of the president.

(h)(7) The terms of new commissioners shall will begin when they are seated at the reorganization meeting of the Board.

(h)(8) If an insufficient number of nominating petitions are filed to require balloting in a division, the person or persons nominated shall will be declared elected.

(h)(9) If any day or date set forth above shall fall on a falls on Saturday, Sunday or holiday, the act required or time fixed shall will occur on or run from the next working day.

(i) Disputed election.

(i)(1) If there is a dispute as to the validity of the election of a commissioner, it shall will be resolved by the Board at its first meeting after the election or at an adjourned meeting. Any Board member involved in the dispute shall will not be entitled to vote. The executive director shall will give written notice to each candidate of the hearing on the contested election and each candidate shall will have the right to be personally present, to be represented by counsel and to present proof at such the hearing. The Board shall have has the right to examine the ballots and to inquire into their validity and into all matters germane to the election and dispute.

(i)(2) The Board may designate a committee from among its members to hear disputed election matters, but decisions of the committee shall will not be effective until approved by the Board. In every contested election hearing, the Board shall have has the right to prescribe rules and regulations for the conduct.

113 (i)(3) The decision of the Board ~~shall-is~~ be final.

114 (j) Meetings.

115 (j)(1) The Board ~~shall-will~~ hold regular meetings at the Bar offices or at such
116 other place as the Board may determine.

117 (j)(2) Special meetings of the Board may be held at any time upon the call of
118 the president, and ~~shall-must~~ be called by him or her at the written request of
119 three or more members of the Board.

120 (j)(3) Reasonable notice of the time and place of all regular special meetings
121 ~~shall-must~~ be given to each member of the Board by the executive director by
122 ~~mail, telephone, fax, e-mail or telegraph.~~ email.

123 (j)(4) At any regular or special meeting of the Board, any business may be
124 transacted which is within the power of the Board, whether or not such business
125 has been placed upon the agenda in advance; provided, however, that advance
126 notice pursuant to subparagraph (j)(3) above must be given for removal of
127 officers and lawyer commissioners.

128 (j)(5) If less than a quorum of the Board is present at a meeting, those
129 present may adjourn the meeting to a later time, and if a quorum is present at
130 the time to which the meeting was adjourned, the Board may proceed with the
131 conduct of business without further call or notice.

132 (j)(6) If the president desires the vote of the Board without calling a meeting,
133 ~~such~~ a vote may be taken by telephone ~~or,~~ e-mail ~~or fax,~~ provided that all
134 members of the Board ~~who are available at their respective business offices~~
135 ~~shall~~ are be given an opportunity to vote.

136 (k) Quorum. Eight members of the Board ~~shall-constitutes~~ a quorum for
137 conducting the business of the Board and a majority vote of those present and
138 voting at any meeting ~~shall-be-is~~ sufficient to take effective action to bind the
139 Board; provided, however, that the nomination of candidates to run for the office
140 of president-elect and the selection of a lawyer commissioner to fill a vacancy
141 ~~shall-must~~ be by majority vote of the entire Board. All members of the Board
142 who are present ~~shall-must~~ vote on all matters when a vote is taken unless they
143 excuse themselves from voting or are excused from voting by a majority of the
144 Board members present ~~by-reasonbecause~~ of a conflict of interest.

145 (l) Executive Committee. An Executive Committee of not fewer than three
146 members, two of whom shall be the president and the president-elect, with the
147 remaining members of the Executive Committee being voting members of the
148 Board, ~~shall-will~~ be appointed by the president with the approval of the Board.
149 The executive director ~~shall-will~~ be an ex-officio member of the Executive
150 Committee. The duties of the Executive Committee shall include:

(l)(1) the handling of emergency matters when the entire Board cannot be convened or the requirements of paragraph (g) above cannot be met;

(l)(2) the review of the affairs of the Bar and the making of recommendations to the Board;

(l)(3) the handling of ministerial and routine business of the Bar which transpires between Board meetings; and

(l)(4) any other matters delegated to it by the Board.

All recommendations and ministerial matters ~~shall~~must be reported to the Board as a part of the agenda for the next Board meeting following ~~such the~~ action.

(m) Liaison assignments. In addition to performing ~~such~~ duties ~~as are~~ required by law or which may be assigned to individual members of the Board, commissioners and officers may be assigned as contacts or liaison representatives to the various committees, sections and units of the Bar, and in ~~such that~~ capacity ~~shall will~~ have the authority to call meetings of the committees, sections or units of the Bar and may report thereafter at the meetings of the Board. The members of the Board and officers should affiliate and participate with, and be informed upon the work of the American Bar Association and other organizations on subjects relating to those under consideration by the Board, committees, sections and units of the Bar to which the Board members are assigned.

(n) Sub-committees. The Board may appoint ~~such~~ sub-committees ~~as it deems desirable in order to~~ to carry out its functions.

(o) Executive ~~director~~Director.

(o)(1) The ~~executive~~Executive ~~director~~Director ~~shall is be~~ selected by the Board ~~at the meeting held immediately following the adjournment of the annual convention.~~

(o)(2) The salary ~~and~~ duties and employment term of the ~~executive~~Executive ~~director~~Director are contained in the Executive Director's employment agreement with the Board. ~~shall be fixed by the Board. The term of office of the executive director shall be for one year.~~

(o)(3) The ~~executive~~Executive ~~director~~Director ~~shall will have and~~ perform duties as secretary to the Board as provided by law and ~~such any~~ other duties ~~as shall be~~ prescribed by the Board or delegated by the president, not inconsistent with law and these Bylaws. The Executive Director has the authority to hire and terminate staff.

187 (p) Ex-officio members. Ex-officio members of the Board may be designated
188 by the Board from year to year, but any designation ~~shall~~will not be effective
189 for more than one year, and ~~such~~ ex-officio members ~~shall~~are not be entitled
190 to vote.

191

192

Rule 14-206. Officers.

(a) President. The president-elect ~~shall~~ automatically succeeds to the office of president pursuant to Article 1, Integration and Management.

(b) President-elect; qualifications; voting procedures.

(b)(1) A lawyer commissioner who wishes to be considered as a candidate or a commissioner who wishes to recommend the name of another lawyer in good standing on active status to be considered as a candidate ~~shall~~ must notify the Board in writing no later than January ~~12~~. The Board also may consider additional candidates at its discretion.

(b)(2) The Board ~~shall~~ must nominate at least one candidate to run for the office of president-elect from among the names submitted to the Board as set forth above. The Board, by vote, ~~shall~~ must nominate those running for the office of president-elect at a regularly scheduled meeting. Balloting for nomination to run for the office of president-elect ~~shall~~ will be by secret ballot except that commissioners not in attendance at the meeting may submit their vote in writing to the president or executive director.

(b)(3) A lawyer elected president-elect ~~shall~~ succeeds to the office of president and ~~shall then serves~~ s as president with authority to represent the Bar and preside at all meetings of the Board and the Bar even though the president-elect may not be serving ~~in~~ a term as an elected commissioner. A president and president-elect who are not elected commissioners have the authority to vote on matters brought before the Board. In the event of a tie vote, the matter at hand shall fail to pass.

(b)(4) Ballots ~~shall~~ will be provided to all active ~~members~~ lawyer licensees of the Bar containing the alphabetized names of the candidates. The ballots ~~shall~~ will be provided electronically via email, ~~and if by mail, mailed~~ to active ~~members~~ lawyer licensees at their email address on record with the Bar ~~business mailing address at at~~ least 15 days prior to the date on which the election closes. ~~date on which ballots will be counted. In the event that~~ If there is only one candidate for the office of president-elect, the ballot ~~shall~~ will be considered as a retention vote and a majority of those voting ~~shall~~ will be required to reject the sole candidate.

~~(b)(4)(A) The ballot, together with a ballot envelope and a cover envelope in which the voting member shall identify himself or herself, shall be included if the ballot was mailed.~~

(b)(4)(~~BA~~) Ballots ~~shall~~ must state the date ~~upon which~~ they are due and ~~be submitted shall be returned so as to reach the Bar offices, whether by mail, in person or electronically~~ no later than 59:00-59 p.m. Mountain Time on ~~the day~~

39 ~~prior to the date ballots will be counted. Balloting shall close at 5:00 p.m. the day~~
 40 ~~the election closes.~~

41 ~~(b)(4)(C) The candidates may submit in writing the names of two persons to~~
 42 ~~act as ballot counters, and arrange to have counters at the Bar offices or such~~
 43 ~~other place as the executive director shall determine on the date and time for~~
 44 ~~counting ballots.~~

45 ~~(b)(4)(D) The executive director shall designate the time, date and place for~~
 46 ~~the counting of ballots, and shall arrange for the counting for those ballots not~~
 47 ~~cast electronically.~~

48 (b)(4)(~~EB~~) The successful candidate ~~shall will~~ be notified by the ~~president~~
 49 ~~Executive Director. The President who shall must~~ then call a meeting of the
 50 Board prior to the end of the annual meeting for the purpose of reorganizing the
 51 Board. Public announcement of election results ~~shall will~~ be made at the
 52 discretion of the president.

53 (b)(4)(~~FC~~) The term of the new president-elect ~~shall will~~ begin when he or
 54 she is seated at the reorganization meeting of the Board.

55 (b)(4)(~~GD~~) If any day or date set forth above ~~shall falls~~ on a Saturday,
 56 Sunday or holiday, the act required or time fixed ~~shall will~~ occur on or run from
 57 the next working day.

58 (b)(5) If there is a dispute as to the validity of the election it ~~shall will~~ be
 59 resolved by the Board at its first meeting after the election. Any Board member
 60 involved in the dispute ~~shall will~~ not be entitled to vote. The executive director
 61 ~~shall must~~ give written notice to each candidate of the hearing on the contested
 62 election and each candidate ~~shall will~~ have the right to be personally present,
 63 to be represented by counsel and to present proof at ~~such the~~ hearing. The
 64 Board ~~shall havehas~~ the right to ~~examine the ballots and to~~ inquire into ~~their~~
 65 ~~validity and into~~ all matters germane to the election and dispute.

66 (b)(5)(A) The Board may designate a committee from among its members to
 67 hear disputed election matters, but decisions of the committee ~~shall will~~ not be
 68 effective until approved by the Board. In every contested election hearing, the
 69 Board ~~shall will~~ have the right to prescribe rules and regulations for the
 70 ~~conductreview or hearing.~~

71 (b)(5)(B) The decision of the Board ~~shall be is~~ final.

72 (c) Seating new commissioners and officers. The reorganization meeting of
 73 the Board ~~shall must~~ be called to order by the outgoing president. He or she
 74 ~~shall must~~ first conduct any unfinished business ~~to come~~ before the existing
 75 Board. Thereafter, the newly-elected commissioners who have been found
 76 qualified and declared elected ~~shall must~~ be seated as members of the Board.

77 The outgoing president ~~shall~~must recognize and seat the new president and
78 president-elect.

79 (d) Terms of office. The terms of office of the president and president-elect
80 ~~shall~~must run concurrently and ~~shall~~must begin at the commencement of the
81 annual convention and run until their successors have been seated.
82 Notwithstanding the running of the president's term of office, all official functions
83 of the annual convention ~~shall~~must be presided over by the outgoing president.

84 (e) Duties and temporary absences. The president ~~shall~~must preside at all
85 meetings of the Bar and of the Board, and in the event of any temporary
86 absence, the president-elect ~~shall~~must perform the duties of the president. The
87 president ~~shall~~must represent the Bar at all appropriate functions and ~~shall~~
88 must perform such ~~other~~ duties and ~~otherwise~~ represent the Bar and the Board
89 as directed by the Board.

90 (f) Vacancies. A vacancy occurs in the office of president or president-elect
91 by reason of death, resignation, incapacity, retirement, removal, change of
92 residence from Utah, or upon the incumbent ceasing to be an active ~~member~~
93 ~~lawyer licensee of the Bar~~ in good standing. A vacancy ~~shall~~must be filled by
94 the Board from among its members ~~upon~~by a majority vote by secret ballot of
95 the remaining Board members. Commissioners not in attendance at the
96 meeting may submit their vote in writing to the executive director. If a vacancy
97 occurs in the office of president-elect a president-elect ~~shall~~must be nominated
98 and stand for election under Article 1, Integration and Management and
99 paragraph (b) above.

100 (g) Removal. The president or president-elect may be removed from office
101 by:

102 (g)(1) the vote of nine of the current voting commissioners at a meeting of
103 which advance notice of the removal vote is given as provided in 14-204(a)(2),
104 provided that commissioners not in attendance at the meeting may submit their
105 vote in writing to the executive director; or

106 (g)(2) the vote of a majority of the active ~~members~~ lawyer licensees of the
107 ~~Bar~~ voting in a special election held for the purpose of consideration of removal.
108 Ballots ~~shall~~must be emailed, ~~first class~~, 20 days after the filing of a petition
109 calling for removal signed by 10% of the active ~~members~~ lawyer licensees of
110 ~~the Bar~~. Ballots ~~shall be~~ are due 17 days after emailing and the results tabulated
111 and announced not more than 45 days after the filing of the petition.

TAB 6

WORK EXPERIENCE

LEAR & LEAR LAW OFFICES, *OF COUNSEL ATTORNEY*

SEPT. 2014- PRESENT

- Specialize in education law
- Advise LEAs with regard to an array of legal issues: employment, student services, administrative matters, federal and state statutes and regulations
- Train LEAs on compliance with various areas of the law
- Track all education-related legislation each legislative session and create tracking sheet

WEBER SCHOOL DISTRICT, *LEGAL COUNSEL*

SEPT. 2014-PRESENT

- Advise Superintendent and Directors regarding employment, student matters, federal programs, and other areas of law
- Attend Board meetings when requested
- Review policies

UTAH STATE OFFICE OF EDUCATION,

EDUCATION SPECIALIST, PROSECUTOR/INVESTIGATOR FOR UPPAC

MAR. 2011-AUG. 2014

- Provide guidance to local education agencies (LEAs) on legal matters
- Train LEAs, teachers, administrators, counselors on compliance with law and ethics
- Investigate and prosecute educators for educator misconduct

UTAH STATE OFFICE OF EDUCATION, *CONTRACT HEARING OFFICER*

JULY 2008 – MAR. 2011

- Administer and oversee hearings before the Utah Professional Practices Advisory Committee (UPPAC)
- Write the legal opinions and recommendations for the decision of the UPPAC Board

VISTA ADOLESCENT TREATMENT CENTER, *TEACHER*

SEPT. 2008 – MAR. 2011

- Teach English (9th - 12th grades writing and literature, and Creative Writing) and history (Geography, World History, U.S. History, and U.S. Government) to troubled adolescents boarding at the school
- Assess students' performance, develop curriculum, and maintain discipline both in and out of the classroom

WEST HIGH SCHOOL, *DEBATE HEAD COACH*

SEPT. 2009 – APR. 2010

- Acted as administrator for all tournaments and activities
- Fundraised and budgeted
- Communicated with parents regarding tournaments, required releases and other pertinent information
- Arranged travel and accommodations for out-of-state tournaments

UNIVERSITY OF UTAH OFFICE OF GENERAL COUNSEL, *RESEARCH ATTORNEY*

JAN. 2008 - AUG. 2008

- Researched a wide variety of legal issues concerning the University of Utah, including but not limited to immigration questions, FERPA concerns, and gun rights
- Drafted memoranda for the other attorneys in the office

SNOW, CHRISTENSEN & MARTINEAU, *ATTORNEY*

JAN. 2005 - JAN. 2008

- Complex commercial litigation
- Employment law, construction law, administrative law, insurance defense, section 1983 suits
- Researched and analyzed legal issues, drafted legal briefs for the court, appeared and presented oral argument before the court, prepared for and took depositions and interviews of witnesses and conducted discovery in litigation matters

PARSONS, BEHLE & LATIMER, *LAW CLERK*

MAY 2004 – AUG. 2004

- Drafted briefs for court and legal analysis for other attorneys
- Attended depositions and trials
- Corresponded with clients

UTAH ATTORNEY GENERAL, *LAW CLERK*

MAY 2003 – AUG. 2003

- Researched case law and wrote memoranda for the court and for other attorneys

DAVIS SCHOOL DISTRICT, **HISTORY TEACHER**

AUG. 1999 - JUNE 2002

- Taught 8th Grade American History, managing 200+ students each year, preparing daily lesson plans, assessing students' performance, developing curriculum, grading papers, and serving on numerous extra-curricular committees
- Served as Davis Education Association representative, 2001-2002 school year
- Served on Team of four Utah teachers to re-write State 8th Grade Social Studies core curriculum

UNITED STATES SENATE, **LEGISLATIVE CORRESPONDENT**

JAN. 1999 - AUG. 1999

- Received mail from Senator Larry Craig's constituents and researched legislative issues addressed therein
- Corresponded with constituents through letters or by telephone: received 500+ letters regarding Clinton impeachment
- Met with Senator Craig in weekly staff meetings to discuss constituent concerns

EXTERNSHIPS DURING LAW SCHOOL

UTAH SUPREME COURT, CHIEF JUSTICE CHRISTINE DURHAM—SALT LAKE CITY, UTAH, 2005

UTAH FEDERAL DISTRICT COURT, JUDGE TED STEWART—SALT LAKE CITY, UTAH, 2004

DIBBS BARKER GOSLING—SYDNEY, AUSTRALIA, 2003

EDUCATION**JURIS DOCTORATE**, APRIL 2005, *magnum cum laude*

J. REUBEN CLARK LAW SCHOOL, PROVO, UTAH

- Class Rank: Top 15%
- National Moot Court Team Brief Writer
- Third Place Brief, National Moot Court Competition, 2005
- Moot Court Board, Skills Director

BACHELOR OF ARTS, DECEMBER 1998

UTAH STATE UNIVERSITY, LOGAN, UTAH

- English Major/History Minor, *Education Emphasis*
- Graduated *cum laude*, GPA: 3.72
- Academic Merit Scholarship, 1995-1998
- Dean's List, College of HASS, 1997-1998

ORGANIZATIONS AND VOLUNTEER POSITION

- **Legal Aide Clinic**--Volunteer as supervising attorney at legal aide clinic for indigenous persons seeking legal help (2002-2005)
- **Big Bother, Big Sisters**—Befriend and mentor 18 year old girl from high risk community (2005-2010)
- **Wasatch Youth Detention Center**—Prepare and participate in weekly activity with youth; teach Sunday School every other month; organize and execute Sub-for-Santa each year (2005-2010)
- **Young Lawyers Division**—Prepare and present to junior high and high school students a lesson on becoming a lawyer (2012-2013)
- **Civic Bar**—Prepare and present to high school students on Constitution Day a lesson on the separation of powers (2014)
- **Children's Justice Center Board. Chair**—Administer meetings when the Chair is not present; attend bi-monthly meetings as the representative from Education realm; review legislation during the legislative session (Member since 2011; Vice Chair since 2016)
- **Education Law Section of the Utah Bar, Chair**—Plan and organize Continuing Legal Education courses for members of the Utah State Bar Education Law Section (Member since 2005; Vice Chair since 2016)
- **Utah State Board of Education, Student Data Privacy User Group**—Participate in meetings with other representatives of school districts around the state, and USBE representatives, to discuss the practical application and uses of the Utah Student Data Privacy Act (2017-2019)

BRYAN J. PATTISON

192 East 200 North, Third Floor • St. George, Utah 84770

Telephone: (435) 674-0400 • Facsimile: (435) 628-1610 • E-mail: bpattison@djplaw.com

PROFESSIONAL EMPLOYMENT

Durham Jones & Pinegar, P.C. | St. George, Utah office

2003–present. Shareholder

- Practice in civil litigation, appeals, employment law, and municipal law.
- Briefed and argued numerous cases on appeal involving a wide variety of issues, including governmental immunity, land use, civil procedure, contracts, and governmental immunity, and water rights.
- Extensive motion and trial practice in both state and federal court, with a particular emphasis on contracts, employment, torts, governmental immunity, and constitutional law.
- Elected shareholder in firm in 2007.

Snow Nuffer | St. George, Utah

2001-2002: Associate

- Maintained general civil practice primarily focused on general civil litigation, appeals, and real estate development.
- Firm merged with Durham Jones & Pinegar in January 2003.

The Honorable Judith M. Billings, Utah Court of Appeals | Salt Lake City, Utah

2000-2001: Judicial Clerk

- Reviewed appellate briefs, wrote bench memoranda, and performed legal research.
- Assisted in drafting appellate opinions and preparing for oral arguments.

EDUCATION

University of Oklahoma College of Law | Norman, Oklahoma

J.D., *with distinction*, 2000

- Assistant Managing Editor, Member, *Oklahoma Law Review*, 1998-2000
- American Jurisprudence Award in Contracts
- Editor, *American Indian Law Review*, 1998-1999

Westminster College | Salt Lake City, Utah

B.S., *cum laude*, Business Management, 1997

BRYAN J. PATTISON
RESUME
PAGE 2

ADMISSIONS

Utah State Bar (2000)
United States Supreme Court (2012)
United States District Court for the District of Utah (2002)
United States Court of Appeals for the Tenth Circuit (2002)
United States Court of Appeals for the Ninth Circuit (2002)

PROFESSIONAL COMMITTEES/ACTIVITIES

- Member, Utah Supreme Court Ethics & Discipline Committee (2012-present). Appointed Vice Chair of panel effective August 2013.
- Member, Utah Supreme Court Advisory Committee on Rules of Appellate Procedure (2003-present)
- Board Member, Utah Chapter of the Federal Bar Association (2013-present)
- Member, Executive Committee of the Utah State Bar's Litigation Section (2002-present) (lone southern Utah representative)
- Member, 2005 Utah State Bar Spring Convention Committee

PUBLICATIONS

- "Writing to Persuade," 24 Utah Bar. J. 10 (March/April 2011)
- "Henriod, Dissenting," 19 Utah Bar J. 26 (May/June 2006)
- "Burlington Industries, Inc. v. Ellerth and Faragher v. City of Boca Raton: A Clear Rule of Deterrence or an Invitation to Litigate? The Supreme Court Rules on Employer Liability for Supervisory Sexual Harassment." 52 OKLA. L. REV. 461 (1999)

PRESENTATIONS

- "The Anatomy of an Appeal," Utah Bar Spring Convention (March 2012). Co-presenter with Justice Matthew Durrant and Judge Gregory Orme.
- "The New Utah Rules of Civil Procedure: Highlights, Lowlights, and Stuff in Between," Utah State Bar Litigation Section CLE (October 2011).
- "Factoids, Vignettes, and Useless Trivia: A Walk Through Supreme Court History," Southern Utah Bar Fall CLE (2009)
- "Checklist for Appellate Briefs," Utah State Bar Mid-Year Convention (2003)

BRYAN J. PATTISON

RESUME

PAGE 3

REPRESENTATIVE CASES

- *Cloud v. Washington City*, 295 P.3d 181 (Utah Ct. App. 2012)
- *Gilbert Development Corp. v. Wardley Corp.*, 246 P.3d 131 (Utah Ct. App. 2010)
- *Thorpe v. Washington City*, 2010 UT App 297, 243 P.3d 500 (Utah Ct. App. 2010)
- *Brazzle v. Washington City*, 2010 WL 624865 (D. Utah Feb. 19, 2010)
- *Wilkinson v. Washington City*, 230 P.3d 136 (Utah Ct. App. 2010)
- *Fort Pierce Business Park, LC v. Closing Resources, LLC*, 2009 UT App 357 (Utah Ct. App. Dec. 3, 2009)
- *Stevens v. LaVerkin City*, 183 P.3d 1059 (Utah Ct. App. 2008)
- *Town of Leeds v. Prisbrey*, 179 P.3d 757 (Utah 2008)
- *Bilanzich v. Lonetti*, 160 P.3d 1041 (Utah 2007)
- *Heideman v. Washington City*, 155 P.3d 900 (Utah Ct. App. 2007)
- *Searle v. Milburn Irrigation Co.*, 133 P.3d 382 (Utah 2006)
- *Zion Factory Stores Holding v. Lawrence*, 121 P.3d 53 (Utah Ct. App. 2005)
- *Hernandez v. Baker*, 104 P.3d 664 (Utah Ct. App. 2004)
- *Blackburn v. Washington City*, 101 P.3d 391 (Utah Ct. App. 2004)
- *Hale v. Beckstead*, 74 P.3d 628 (Utah Ct. App. 2003)

OTHER RECOGNITIONS

- Maintain an AV-rating from Martindale Hubbell in the areas of Appellate Practice and Litigation.
- Named to *Utah Business* magazine's list of "Utah's Legal Elite" in the area of Litigation (2007-2010, 2012-2014)
- Named as a "Rising Star" in the field of employment law in the 2009 and 2010 editions of *Mt. States Super Lawyers* magazine

OTHER MEMBERSHIPS

- Utah State Bar, Litigation Section
- Utah State Bar, Appellate Section
- Southern Utah Bar Association
- Federal Bar Association
- Defense Research Institute
- Supreme Court Historical Society

BRYAN J. PATTISON
RESUME
PAGE 4

OUTSIDE ACTIVITIES/INTERESTS

Youth football and baseball coach. Other interests include U.S. history and biography, legal writing, and Oklahoma Sooners athletics.

STRONG & HANNI

John M. Zidow Shareholder

Jzidow@strongandhanni.com

P: 801.532.7080

F: 801.596.1508

Contact

Government Defense

Real Property

Eminent Domain

Construction

Insurance Defense

Commercial Law

John provides litigation and transactional services related to real property, construction, insurance defense, personal injury, health, and other commercial law matters. He has substantial experience in eminent domain law and has been the lead attorney in over 50 direct or inverse condemnations lawsuits.

John was born in Bridgeport, Connecticut and has lived in Massachusetts, Texas, Florida, and North Carolina. He graduated from Davidson College with a B.A. in History and obtained his law degree from Florida State University. While in law school, John received certificates in land use, natural resources, and environmental law, all with honors, and was recognized for achieving highest grades in multiple property law courses.

Prior to joining the firm, John served as an Assistant Utah Attorney General where he litigated complex real property and eminent domain matters on behalf of the State of Utah and advised the University of Utah in its health care billing and disclosure efforts. He then joined the law firm of Williams & Hunt where he primarily litigated property and construction claims, assisted community associations with their governance matters, and defended governmental entities in breach of contract and negligence actions.

Professional Memberships & Recognitions

Utah Bar Association

Utah State Bar Examiner

Salt Lake County Bar Association

Utah State Bar Litigation Section

Utah State Bar Real Property Section

Utah State Bar Construction Law Section

Defense Research Institute

Listed by Super Lawyers

Reported Cases

Baumann v. The Kroger Company, 2016 UT App 165

TAB 7

**UTAH STATE BAR
BOARD OF BAR COMMISSIONERS
MINUTES**

APRIL 9, 2020

TELEPHONIC MEETING

- In Attendance:** President Herm Olsen and President-elect Heather Farnsworth.
Commissioners: John Bradley, Mary Kay Griffin, Chrystal Mancuso-Smith, Marty Moore, Mark Morris, Mark Pugsley, Michelle Quist, Tom Seiler, Cara Tangaro, Heather Thuet and Katie Woods.
- Ex-Officio Members:** Erik Christiansen, Kate Conyers, Torie Finlinson, Candace Glead, Dean Elizabeth Kronk-Warner, Margaret Plane, Camila Moreno, and Dean Gordon Smith.
- Not in Attendance:** Steven Burt. Ex-Officio Members: Nate Alder, H. Dickson Burton, Amy Fowler, Jiro Johnson, and Robert Rice.
- Also in Attendance:** Executive Director John C. Baldwin, Assistant Executive Director Richard Dibblee, General Counsel Elizabeth A. Wright and Supreme Court Liaison Larissa Lee.

Minutes: 10:01 a.m. start

1. President's Report: Herm Olsen

- 1.1 Report on Action to Permit Law Practice Under Diploma Privilege.** Admissions Director Joni Seko and Admissions Committee Chairs Steve Waterman and Dan Jensen joined the meeting. Dean Gordon Smith emphasized that the law schools proposed the diploma privilege as part of a long running discussion on access to justice that was initiated by the Court.

The Commission discussed the proposed order the Court is expected to issue that will allow some law student applicants for the July 2020 bar exam to practice law without taking a bar exam. Before licensure these applicants will be required to have 360 hours of supervised practice. The Commission then discussed the divergent positions on how to measure law graduate competency to practice law. The law schools argue that graduation from law school is a sufficient measure of competency. The Admissions Committee discussed the reasons the bar exam is the best, objective measure of competency to practice law. The Commission and guests discussed the details of the 360 hours of supervised practice and some difficulties that will present for rural lawyers and law employers in general. The Commission also discussed the long-term implications for lawyers who have never passed a bar exam.

- 1.2 Report of July Bar Exam Schedule Changes Under Consideration.** The July 2020 bar exam is cancelled because of the COVID-19 pandemic. The National Conference of Bar Examiners may offer the exam in September or October depending upon the status of the COVID-19 pandemic restrictions.
- 1.3 Report on May Admissions Ceremony Schedule Change.** The May admissions ceremony will not take place because of the COVID-19 pandemic restrictions on large gatherings. Court and Bar staff are arranging to conduct the ceremony remotely.
- 1.4 Extension of Licensing Late Fees Deadline.** In the interest of accommodating licensees who may be suffering personal and financial difficulties as a result of the COVID-19 pandemic, Bar staff propose extending the late fee deadline and suspension deadline by 90 days for the 2020-2021 licensing cycle only. John Baldwin reported that the Bar could financially weather the change in cash flow. **Tom Seiler moved to extend the licensing late fee deadline to November 1 and the suspension for failure to pay deadline to December 1 for the upcoming licensing cycle. Marty Moore seconded the motion which passed unopposed.**
- 1.5 Park City Summer Convention Dates.** Richard Dibblee reported that the Co-Charis of the 2020 Summer Convention Committee, Justice Paige Petersen and Margaret Plane, recommend cancelling the July 2020 Summer Convention because of the COVID-19 pandemic. Even if travel and gathering restrictions are lifted by July, it is unlikely the Bar will be able to market, plan and find enough interested registrants for the convention. Richard Dibblee further reported that Vail resorts agreed to allow the Bar to terminate its contract without demanding the liquidated damages required under the Bar's contract with the resort. The resort agreed to keep the \$5000 deposit paid by the Bar. **Heather Farnsworth moved to cancel the July 2020 Summer Convention and accept Vail's offer to accept termination with no damages and retention of the \$5000 deposit. Chrystal Mancuso-Smith seconded the motion which passed unopposed.**
- 1.6 Report on Postponement of April LPP Exam & Treatment of LPP's.** John Baldwin reported that the March 31, 2020 LPP exam was cancelled because of the COVID-19 pandemic and the Salt Lake County shelter in place order. The March applicants will hopefully be able to take the exam in August. John Baldwin also reported that currently licensed LPPs reported some incivility and mistreatment from a few lawyers. The Court's LPP Committee met to discuss the issue and will propose some solutions.

2. Discussion Items.

- 2.1 Bar Survey Results: Mark Morris.** Mark Morris gave an overview of the results from the survey of Bar licensees. He also recommended waiting to release the results until a summary analysis of the data and recommendations could be released along with the results. The company that conducted the survey will assemble the data and present at the next Commission meeting.

2.2 Long Range Planning for Assistance to Lawyers “In the Aftermath”

a. Pro Bono Program for Assistance with SBA & Other Financial Aid. The Commission discussed the need to provide services for Bar licensees in the wake of the COVID-19 pandemic. The Commission also discussed the need for lawyers to help the public faced with COVID-19 pandemic challenges. The Access to Justice staff are organizing to provide legal services online and to provide pro bono assistance to small businesses navigating some of the federal relief options available to them. There will be free CLEs to train volunteer lawyers how to be of assistance. Torie Finlinson reported that the YLD is working to expand its Will for Heroes program to health care workers.

The meeting adjourned for the day at 12:03 p.m.

Consent Agenda

1. Approved Minutes from the March 12, 2020 Commission Meeting.

Carrie T. Boren (Bar No. 10600)
Utah State Bar
645 South 200 East
Salt Lake City, Utah 84111-3834
(801) 531-9077

BEFORE THE SUPREME COURT OF THE STATE OF UTAH

In the Matter of Lesta M. Simmons
Applicant for Admission
Of Military Spouse
Pursuant to Rule 14-805

**SPECIAL MOTION FOR ADMISSION
TO THE UTAH STATE BAR AND THE
UTAH SUPREME COURT**

The Board of Commissioners of the Utah State Bar (“Board”) hereby respectfully moves for admission of Lesta M. Simmons to the Utah State Bar and the Utah Supreme Court. Ms. Simmons has been approved for admission by the Board, the Board certifies to this Court that Ms. Simmons meets the requirements set forth in Rule 14-805, Admission for spouse of active military stationed in Utah, and she possesses the necessary qualifications of learning, ability, and character prerequisite to the privilege of engaging in the practice of law. The Board further represents that Ms. Simmons has fulfilled all other requirements for admission to the Bar as provided for in the Rules Governing Admission to the Utah State Bar.

Dated this 28th Day of May 2020.

Carrie T. Boren
Utah State Bar

TAB 8

APRIL 2020

EXECUTIVE SUMMARY



UTAH FOUNDATION

RESEARCH • ANALYZE • INFORM
CELEBRATING 75 YEARS**THE JUSTICE GAP**

Addressing the Unmet Legal Needs of Lower-Income Utahns



This report was commissioned
by the Utah Bar Foundation.

THE JUSTICE GAP

ADDRESSING THE UNMET LEGAL NEEDS OF LOWER-INCOME UTAHNS

This report was commissioned
by the Utah Bar Foundation.



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Raymond Hall	Gregory Poulsen
Brandon Hendrickson	Wayne Pyle
Julie Hatchett	Rona Rahlf
Matt Hirst	Stan Rosenzweig
Matt Huish	Cameron Sabin
Robert Hyde	Tim Sheehan
Catherine Kanter	Harris Simmons
Daniel Lewis	Juliette Tennert
David Litvack	Heidi Walker
Dennis Lloyd	Henrie Walton
Linda Makin	LaVarr Webb
Peter Mann	David Woolstenhulme
Celeste McDonald	

Utah Foundation Staff

Shawn Teigen, *Vice President/Director of Research, Principal Author*
 Kai Wilson, *Research Consultant*
 Peter Reichard, *President*
 Christopher Collard, *Research Analyst*
 Megan Luther, *Outreach Coordinator*
 Cecilia G. Sanchez and Leonor Perretta, *Spanish Translators*
 Anthony Dam and Drew Crawford, *Research Interns*

About Utah Foundation

Utah Foundation's mission is to produce objective, thorough and well-reasoned research and analysis that promotes the effective use of public resources, a thriving economy, a well-prepared workforce and a high quality of life for Utahns. Utah Foundation seeks to help decision-makers and citizens understand and address complex issues. Utah Foundation also offers constructive guidance to improve governmental policies, programs and structures.

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Research Report 776

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UTAH FOUNDATION
RESEARCH • ANALYZE • INFORM
CELEBRATING 75 YEARS

150 S. State St., Ste. 444
 Salt Lake City, Utah 84111
utahfoundation.org

EXECUTIVE SUMMARY

In April 2020, Utah Foundation – a nonprofit non-partisan public policy research organization – released a report focusing on the legal needs of lower-income Utahns. The purpose of the report is to inform the public of Utahns’ civil legal needs and provide research to help stakeholders with informed decision-making on the future allocation of funding for legal resources. Utah Foundation undertook this project at the request of the Utah Bar Foundation.

Recognizing that critical civil legal needs of low-income Utahns were left unmet, the Utah State Bar, pursuant to an order of the Utah Supreme Court, formed an Access to Justice Task Force in 1996 to make recommendations to address gaps in services. These efforts have led to significantly more Utahns receiving legal help to resolve their legal problems.

Even after much progress, however, Utah still has tremendous unmet legal needs.

The Justice Gap: Addressing the Unmet Legal Needs of Lower-Income Utahns is based on a Utah Foundation survey of approximately 1,700 lower-income Utahns — or the roughly 26% of Utah’s population living at or below 200% of the federal poverty line. The report also relies heavily on data and analysis provided by Kai Wilson and David McNeill. In addition, the report includes short stories about the clients of legal service organizations, analysis of data from the United Way of Salt Lake’s 2-1-1 information and referral service, and data from the U.S. Census Bureau’s American Community Survey.

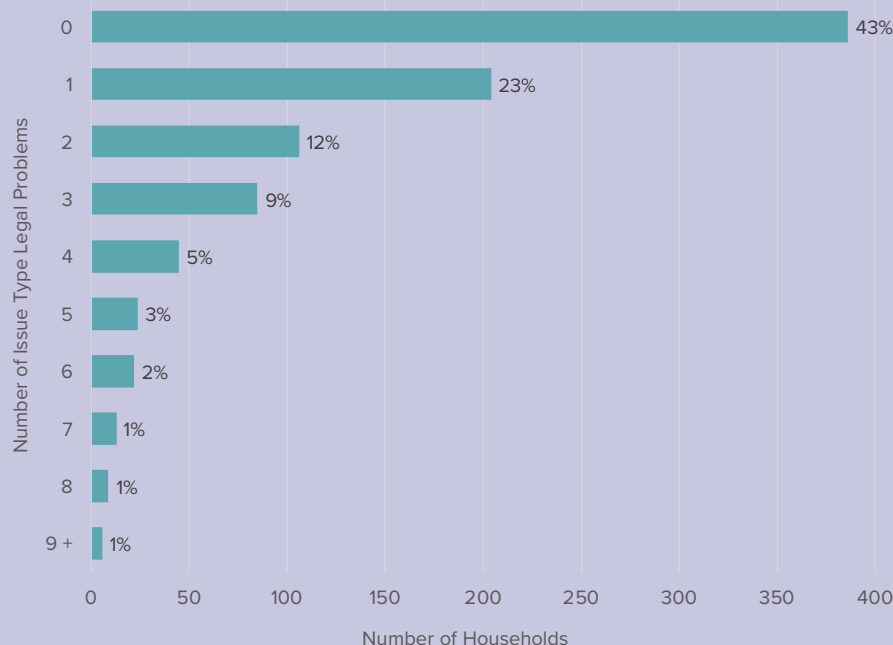


KEY FINDINGS OF THIS REPORT

- Most people do not have representation in civil legal cases in Utah; for the 62,000 debt collection cases, nearly 100% of petitioners (plaintiffs) have lawyers, compared with only 2% of respondents (defendants); for the 14,000 eviction cases, 90% of petitioners have lawyers, compared with only 5% of respondents.
- More than two-thirds of Utah’s lower-income survey respondents indicated that they could not afford a lawyer if they needed one.
- While the median hourly fee for a Utah lawyer is between \$150 and \$250, fewer than one-in-five Utah lawyers offer “discounted fees and rates for persons of modest means” or a “sliding scale based on income.”
- Rural counties tend to have relatively low availability of local legal representation.
- Most lower-income Utahns try to solve their legal problems on their own.
- When asked if the respondents tried to get help with the problems indicated in the survey, three-in-five said they did.
- Half of the respondents that sought help were successful; about one-in-five found assistance from a social or human service agency, one-in-five found help online, and another one-in-five hired a paid attorney. Only about one third used free legal help.
- Over half of all services provided for lower-income Utahns’ legal needs are for family law and immigration issues.
- Financial legal needs topped the list of legal-need types with 26% of households, followed by employment (21%), health law (19%) and public benefits (16%).
- Domestic violence was the least reported legal issue of the 19 types of legal needs in the survey at just 4% of households; however, it had the highest rating for severity for victims and their households.
- The most common employment law issues were that employees were forced to work overtime or “the bad shifts” and that employers “did not pay wages, overtime or benefits, or did not pay them on time.”

Most lower-income households have at least one civil legal needs issue type – and nearly a quarter have three or more issues.

Figure 1: Number of Issue Types per Household, Random-Sample Survey



Note: Survey questions asked about 19 issues types.

Source: Utah Foundation.

The data in this report were collected between November 2019 and February 2020. Note that as a result of the COVID-19 pandemic, certain types of the legal needs estimated in the report have or will likely become much more prevalent and more acute, such as civil legal needs issues related to finances, employment, public benefits, landlord/tenant, domestic violence and others.

Utah Foundation's random sample survey of lower-income Utahns suggests that 57% of lower-income households have at least one civil legal needs issue type – and nearly a quarter have three or more issues. (See Figure 1.)

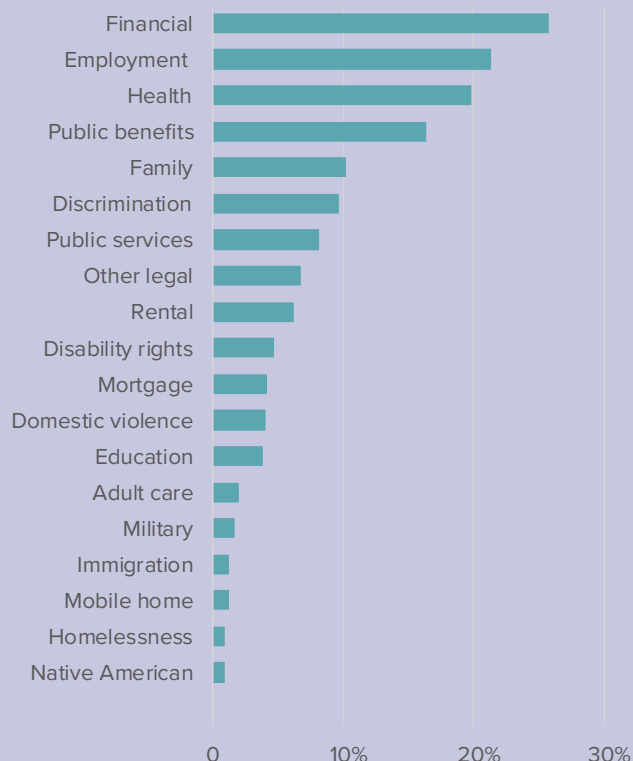
The survey found that financial legal needs topped the list of legal-need types. Over one-quarter of households had a financial legal need issue. This was followed by employment and health legal needs issues. (See Figure 2.)

Financial legal needs are clearly the biggest issues for lower-income households, followed by employment and health care legal needs.

Figure 2: Percent of Respondents' Households with a Specific Need, all Random Sample Survey Responses

Note: Legal issues are divided by the total number of survey respondents, except the "Homelessness" and "Native American" bars, which are online-only responses weighted to be comparable to the other 17 issue types.

Source: Utah Foundation.

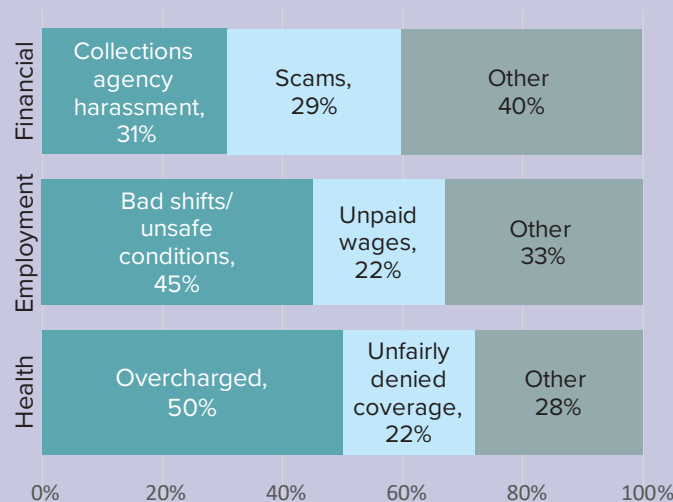


People with financial needs are typically faced with debt collection agency harassment and scams. Employment issues have to do with working bad shifts or in unsafe conditions, and not being paid. People with civil legal health problems report that they were charged too much for services and unfairly declined coverage. (See Figure 3.)

Some needs may be affecting households disproportionately hard. In fact, while domestic violence was the least reported legal issue of the 19 types of legal needs, it had the highest rating for the severity of its impact on households. (See Figure 4.)

Households are grappling primarily with two types of issues in each the top three needs.

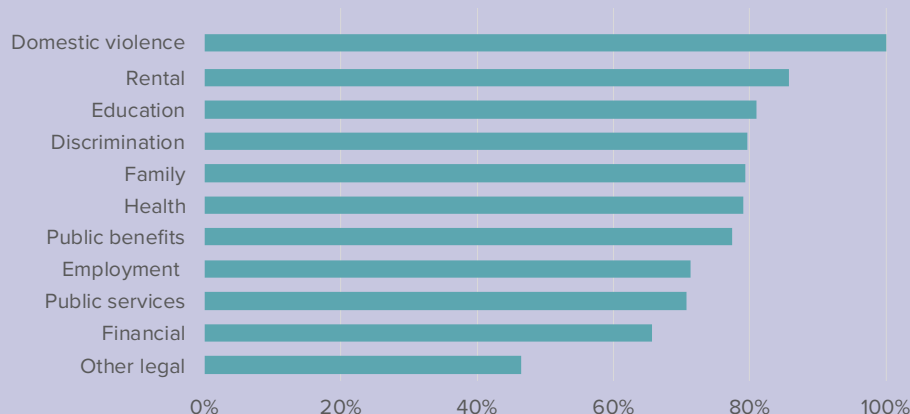
Figure 3: Percent of Respondents' Households with a Specific Need, all Random Sample Survey Responses



Source: Utah Foundation.

Domestic violence is – as expected – at the top of the list of civil legal needs by how much they affect the household.

Figure 4: Severity of the Legal Needs: “How much did the problem affect you or anyone in your household? Not at all, a little, somewhat, a lot,” showing that issue affected household “somewhat” or “a lot,” Online Random Survey Responses



Note: Figure does not include issues with a small sample size.

Source: Utah Foundation.

Most defendants (respondents) in Utah are self-represented in civil cases.

Figure 5: Percentage of Self-Represented Litigants in Utah Court Civil Disposed Cases, FY 2019

	Percentage of all civil cases	Self-represented petitioner	Self-represented respondent
Debt collection	62%	0%	98%
Divorce/annulment	14%	46%	81%
Eviction	6%	10%	95%
Protective orders	5%	53%	70%

Note: Other cases are 2% or less of total cases, consisting mostly of contracts, estates, custody and support, adoption, civil stalking, name changes, and guardianships. The case is considered "disposed" upon dismissal or judgement.

Source: From the Utah Courts, Court Data Request received by David McNeill on January 9, 2020.

Resource disparities highlight the need for legal aid. With the 62,000 debt collection cases, almost none of the respondents or defendants have representation, and most respondents do not have representation for eviction cases. This is vastly unbalanced when considering that almost all of the petitioners or plaintiffs are represented. (See Figure 5.)

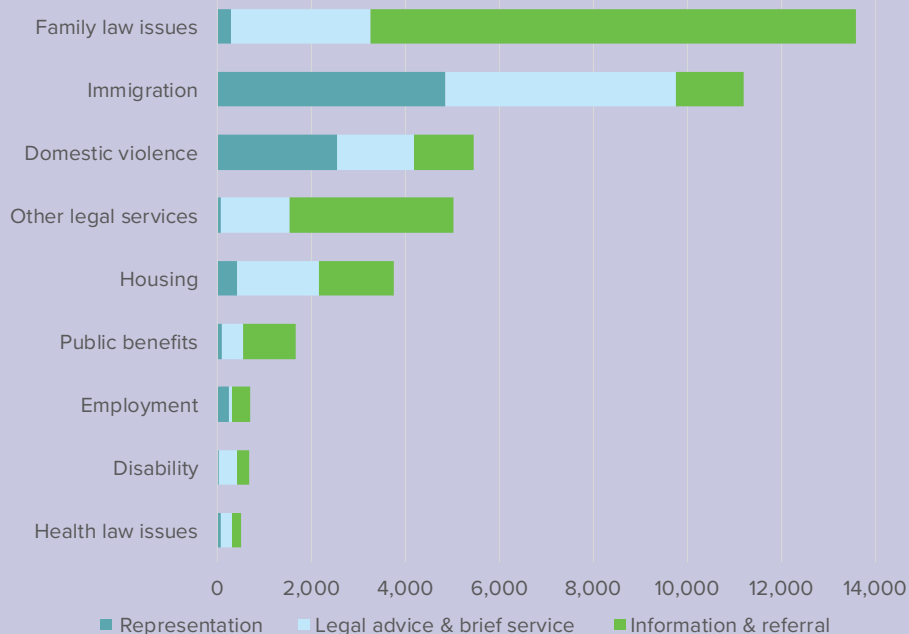
Why are respondents underrepresented? In part because two-thirds of Utah's lower-income survey respondents indicated that they could not afford a lawyer if they needed one – particularly in the face of \$200 per hour legal fees. The situation is even more dire in rural communities. As a result, most lower-income Utahns try to solve their legal problems on their own. This often takes the form of reaching out online. But many people also reach out to social service agencies and elsewhere, including information and referral services, particularly for landlord/tenant disputes and family law issues.

Of those lower-income households who are successful in procuring legal assistance, half are getting help for their family law and immigration issues rather than for financial issues. Domestic violence is not far behind. (See Figure 6.)

Legal services vary widely by number and type of support.

Figure 6: Number of Legal Services Provided in Utah, by Type of Support, 2019

Source: Kai Wilson.



While existing legal services provide support for lower-income Utahns, analysis of Utah's civil legal system shows a large unmet need. In 2019, just over 40,000 lower-income Utahns received some type of legal aid. Utah Foundation's survey suggests that lower-income Utahns' legal problems might total over 240,000. This leaves an enormous legal needs gap. As a result, the 26% of Utahns living at or below 200% of the federal poverty line may find their legal needs insurmountable. (See Figure 7.)

Helping overcome the gap will take more funding for legal aid agencies (either from private or public sources), more social and human service agency support, and more low-cost and pro-bono work by attorneys. While the call to close the legal needs gap has been sounded, there is still a long way to go.

Large legal needs gaps exist between the services provided and the number of problems households experience.

Figure 7: Civil Legal Assistance (2019), Problems (2019), and Needs Gap, Households

	Assistance provided to clients*	Number of problem areas, households†	Legal needs gap
Financial	n/a	42,570	42,570
Employment	694	35,145	34,451
Health law	n/a	32,670	32,670
Public benefits	2,171	27,060	24,889
Discrimination	247	16,005	15,758
Public services	n/a	13,365	13,365
Housing	3,759	16,500	12,741
Disability rights	426	7,755	7,329
Education	153	6,270	6,117
Other legal	5,023	11,055	6,032
Adult care	n/a	3,290	3,290
Family	13,584	16,830	3,246
Military	n/a	2,805	2,805
Native American	14	1,410	1,396
Domestic violence	5,456	6,600	1,144‡
Immigration	11,193	1,980	(9,213)‡
Total	42,720	241,310	198,590

* 49% of "assistance provided in 2019" was in the form of information and referral services. Please note that some assistance may be duplicated; clients may be counted more than once if referred by providers to other providers. See pages 9 and 10 in the full report for more details. Note that this is clients only, not secondary clients, which are typically in the same household as the client.

† The "number of problem areas" is an estimate of the percentage of random-sample survey respondents with a problem area type multiplied by the estimated number of households, multiplied by 66% – the survey respondents who perceived that their legal need "wasn't a big enough problem" or that they "didn't need help." See page 38 in the full report for more details.

‡ Some households may not respond that they need immigration help for fear of a lack of anonymity in the survey.

Source: Kai Wilson data and Utah Foundation random-sample survey. Utah Foundation calculations.



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THE JUSTICE GAP

ADDRESSING THE UNMET LEGAL NEEDS OF LOWER-INCOME UTAHNS

This report was commissioned
by the Utah Bar Foundation.

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APRIL 2020

FULL REPORT



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INTRODUCTION

Numerous organizations support lower-income Utahns with their civil legal needs. Funding from numerous sources helps pay for these services, but does it represent the full support that these Utah households need?

Recognizing that critical civil legal needs of low-income Utahns were left unmet, the Utah State Bar, pursuant to an order of the Utah Supreme Court, formed an Access to Justice Task Force in 1996 to make recommendations to address gaps in services. These efforts have led to significantly more Utahns receiving legal help to resolve their legal problems. Even after much progress, however, Utah still has tremendous unmet legal needs.

This report focuses on the legal needs of lower-income Utahns – or the roughly 26% of Utah’s population living at or below 200% of the federal poverty line. The purpose is to inform the public of Utahns’ civil legal needs and provide research to help stakeholders with informed decision-making on the future allocation of funding for legal resources. Utah Foundation undertook this project at the request of the Utah Bar Foundation.

The data in this report were collected between November 2019 and February 2020. Please note that as a result of the COVID-19 pandemic, certain types of the legal needs estimated in the report have or will likely become much more prevalent and more acute, such as civil legal needs issues related to finances, employment, public benefits, landlord/tenant, domestic violence and others.



KEY FINDINGS OF THIS REPORT

- Most people do not have representation in civil legal cases in Utah; for the 62,000 debt collection cases, nearly 100% of petitioners (plaintiffs) have lawyers, compared with only 2% of respondents (defendants); for the 14,000 eviction cases, 90% of petitioners have lawyers, compared with only 5% of respondents.
- More than two-thirds of Utah’s lower-income survey respondents indicated that they could not afford a lawyer if they needed one.
- While the median hourly fee for a Utah lawyer is between \$150 and \$250, fewer than one-in-five Utah lawyers offer “discounted fees and rates for persons of modest means” or a “sliding scale based on income.”
- Rural counties tend to have relatively low availability of local legal representation.
- Most lower-income Utahns try to solve their legal problems on their own.
- When asked if the respondents tried to get help with the problems indicated in the survey, three-in-five said they did.
- Half of the respondents that sought help were successful; about one-in-five found assistance from a social or human service agency, one-in-five found help online, and another one-in-five hired a paid attorney. Only about one third used free legal help.
- Over half of all services provided for lower-income Utahns’ legal needs are for family law and immigration issues.
- Financial legal needs topped the list of legal-need types with 26% of households, followed by employment (21%), health law (19%) and public benefits (16%).
- Domestic violence was the least reported legal issue of the 19 types of legal needs in the survey at just 4% of households; however, it had the highest rating for severity for victims and their households.
- The most common employment law issues were that employees were forced to work overtime or “the bad shifts” and that employers “did not pay wages, overtime or benefits, or did not pay them on time.”

METHODOLOGY

This report uses data from several main sources: 2018 five-year survey data from the U.S. Census Bureau’s American Community Survey; 2017 one-year survey data from the U.S. Census Bureau’s American Community Survey via IPUMS; 2019 calendar year data from the United Way of Salt Lake’s 2-1-1 information and referral service (2-1-1) provided to Utah Foundation on January 3, 2020; legal aid data from organizations around the state as gathered by Kai Wilson; legal data collected and analyzed by David McNeill; short stories about legal needs provided by legal services organizations; and a statewide survey created by Utah Foundation that asked respondents about a range of problems that often have legal resolutions “in the last 12 months” that relate to “you or anyone in your household.”

Lighthouse Research administered the Utah Foundation survey to a random sample of 900 lower-income Utahns by telephone (584) – both land-line and cell phone – and by email (316). The phone and online surveys were similar, but the online survey provided more detail on several of the legal-issue questions and included additional follow-up questions related to each of the legal needs, as well as additional questions related to any help that respondents may have sought.

Utah Foundation also administered an online-only survey with the help of 2-1-1. This 2-1-1 survey garnered 832 additional responses. The survey was offered in English (754 responses) and in Spanish (78 responses). These responses included many lower-income respondents (703 responses), but also included higher-income respondents (129 responses), which provides detail as to the differences in legal needs by income group.

Surveys often report common demographic characteristics such as gender and age. Since this survey is focused on the household and not any specific householder, we do not report such demographics.

200% of poverty is the common threshold under which Utahns can seek civil legal needs assistance.

Figure 1: Federal Poverty Level, Poverty Guidelines for the 48 Continuous States, 2020

Persons in family/ household	Poverty guideline or “Federal Poverty Line”	200% of the Federal Poverty Line
1	\$12,760	\$25,520
2	17,240	34,480
3	21,720	43,440
4	26,200	52,400
5	30,680	61,360
6	35,160	70,320
7	39,640	79,280
8	44,120	88,240

Note: For families/households with more than 8 persons, add \$4,480 for each additional person for the poverty guideline.

Source: U.S. Department of Health and Human Services, Office of the Assistant Secretary for Planning and Evaluation.

The term “lower-income” has a wide range of definitions. For the purposes of this report, the term refers to those households earning below 200% of the federal poverty line. The poverty line is based upon the spending for one-third of a family’s income on an “economy food plan” as defined by the Agriculture Department in 1963 – as updated annually by the Consumer Price Index ever since.¹ This equation is then used to set poverty thresholds for income (which is pretax income without non-cash amounts) based upon household size.²

Utah’s median household income in 2018 was \$71,414,³ with an average household size of 3.1 people.⁴ The 200% of poverty level for a three-person household equates to approximately 60% of the median income for roughly the same-sized household. As a side note, the median respondent to the random-sample survey had a three-person household.

An estimated 800,687 Utahns – or 26% of the population – lived at or below 200% of poverty in 2018.⁵ That is about 5% lower than the national rate.

This report focuses mainly on civil needs cases that appear in the Utah State Court system – such as the District, Justice and Juvenile Courts – as well as the U.S. Bankruptcy Court, Federal Court, Immigration Court, and others. This report does not examine criminal defense needs because a defendant is entitled to a court-appointed lawyer in a criminal case if unable to afford one. However, except in very rare instances, the respondent (or defendant) and the petitioner (plaintiff) must provide for their own attorneys in Utah’s civil cases.

THE NEED

Civil legal needs are a large problem nationally. Legal Services Corporation reports that “86% of the civil legal problems reported by low-income Americans in the past year received inadequate or no legal help.”⁶ It also reports that most lower-income households have at least one civil legal problem, and a quarter of those households have six or more problems. Health care legal needs topped the list nationally, followed by consumer and finance issues, and rental housing problems.

The legal community has stepped up to this challenge individually, organizationally and collectively to increase access to justice for low-income Utahns. It is investing in new programs, increasing investments, expanding services, adopting new technologies and increasing efficiencies to secure justice for thousands of additional Utahns each year. In 2019, the three largest legal aid organizations in Utah assisted over 12,000 more individuals than 20 years before. And newer nonprofit legal aid programs are assisting thousands more. In addition, the Utah State Bar has established an Access to Justice Commission that recruits pro-bono attorneys and created a roster of attorneys who provide low-cost services to individuals of modest means. The Utah State Court system has implemented the Online Court Assistance Program, opened a self-help center for pro se litigants, adopted rule changes that allow attorneys to provide “unbundled services” and allow some legal help to be provided by Licensed Paralegal Practitioners. Law schools are partnering with practicing attorneys to increase help to those in need while providing hands-on experiences for students. Lastly, the State of Utah has begun investing in efforts to expand access to justice.

Even with all these efforts, the need for legal assistance remains. This is due in part to the cost of legal services. Cost is far and away the biggest barrier for hiring a lawyer, according to a 2017 Lighthouse Research statewide phone survey of more than 1,000 respondents.⁷ These responses came from businesses and a random sample of Utahns – not necessarily lower-income populations. Cost is bound to be an even greater barrier for lower-income Utahns.

When looking at the 920 Utah lawyers who reported their billing rates for their LicensedLawyer.org profiles, the median cost for an attorney in Utah is between \$151 and \$250 dollars per hour.⁸ (See Figure 2.) At that rate, one day’s billing could cost a client as much as \$2,000.

Pro-bono and low-cost attorney services can help defray these costs – when they are available. Of 1,377 Utah lawyers who completed their LicensedLawyer.org profiles, 236 (or 17%) indicated that they offered “discounted fees and rates for persons of modest means” and/or “sliding scale based on income.”⁹

Most Utah lawyers charge more than \$150 per hour.

Figure 2: Hourly Billing Rates for Utah Attorneys

Rate	Percent
Less than \$150/hour	6%
\$151-250/hour	43%
\$251/hour or more	22%
Varies by case	28%
Total	100%

Source: David McNeill, analysis for this report from License-Lawyer.org data using the Utah State Bar’s membership directory data, January 2020.

Most lower-income Utahns believe they could not afford a lawyer if they needed one.

Figure 3: “If you needed a lawyer now, could you afford one?” – Utah Foundation’s Phone and Online Random-Sample Survey

	Percent
No	69%
Yes	16%
It depends on circumstances	5%
Don't know	10%

Source: Utah Foundation.

Still, most of Utah Foundation’s random-sample survey respondents answered “no” when asked, “If you needed a lawyer now, could you afford one?” (See Figure 3.) They may not know that pro-bono or low-cost services are available, or they may perceive that even with such assistance legal help is out of reach.

In addition to issues with affordability, there is simply an under-representation of litigants with civil issues.

For certain legal needs, Utahns almost always hire lawyers; for instance, this is true of adoption and guardianship cases. But for most civil cases, respondents (or defendants) have no legal representation, and in many civil cases, the petitioners (or plaintiffs) often did not have representation either.

In 2019, there were just over 100,000 civil cases in the Utah State Court system.¹⁰ The majority of them were for debt collection. Of the 62,436 debt collection cases, nearly all of the petitioners or plaintiffs were represented by attorneys, but only 2% of the respondents or defendants were represented by attorneys. (See Figure 4.) A slightly less lopsided ratio occurred with the 14,182 landlord/tenant eviction cases, where 90% of petitioners had legal representation, but only 5% of respondents had attorneys. For divorce and annulment filings, by contrast, the petitioner engages a lawyer only about half of the time, while the respondent engages a lawyer nearly one-fifth of the time.

In Utah Foundation’s random-sample survey of lower-income Utahns, most respondents indicated that if they needed a lawyer, they would still try to solve the problem themselves (though for one-in-five respondents, it would depend upon the situation). For many, if the problem were severe enough, they would hire a lawyer. Many would hire one if they could afford one. And many would try to solve the problem themselves first, and then hire a lawyer if the problem was severe and they could afford one.

As found in the responses to the Utah Foundation random-sample survey, about half of

Most defendants (respondents) in Utah are self-represented in civil cases.

Figure 4: Percentage of Self-Represented Litigants in Utah Court Civil Disposed Cases, FY 2019

	Percentage of all civil cases	Self-represented petitioner	Self-represented respondent
Debt collection	62%	0%	98%
Divorce/annulment	14%	46%	81%
Eviction	6%	10%	95%
Protective orders	5%	53%	70%

Note: Other cases are 2% or less of total cases, consisting mostly of contracts, estates, custody and support, adoption, civil stalking, name changes, and guardianships. The case is considered “disposed” upon dismissal or judgement.

Source: From the Utah Courts, Court Data Request received by David McNeill on January 9, 2020.

Most lower-income Utahns would try to solve their legal problems themselves.

Figure 5: If you needed a lawyer “would you hire a lawyer or try to solve the problem yourself?” – Utah Foundation’s Phone and Online Random-Sample Survey

	Percent
Try to solve the problem myself	52%
It depends on circumstances	20%
Hire a lawyer	17%
Don't know	11%

Source: Utah Foundation.

lower-income Utahns with a legal need sought some type of assistance. More than half of those who sought help were successful – 53% of respondents got some type of help. Of those, most received help from a social or human service agency, online resource or from a paid attorney. Additional respondents received help from volunteers or unpaid attorneys, at a courthouse, or from a legal aid organization.

The Futures Commission of the Utah State Bar found that price is not necessarily the only factor Utahns consider when deciding whether to hire a lawyer. Many people “do not sense the need to involve a lawyer or do not understand that using lawyers early in their problem-solving would benefit them.”¹¹ The Commission goes on to note that many potential clients may not know how to connect with lawyers and instead turn to information that is immediately accessible online.

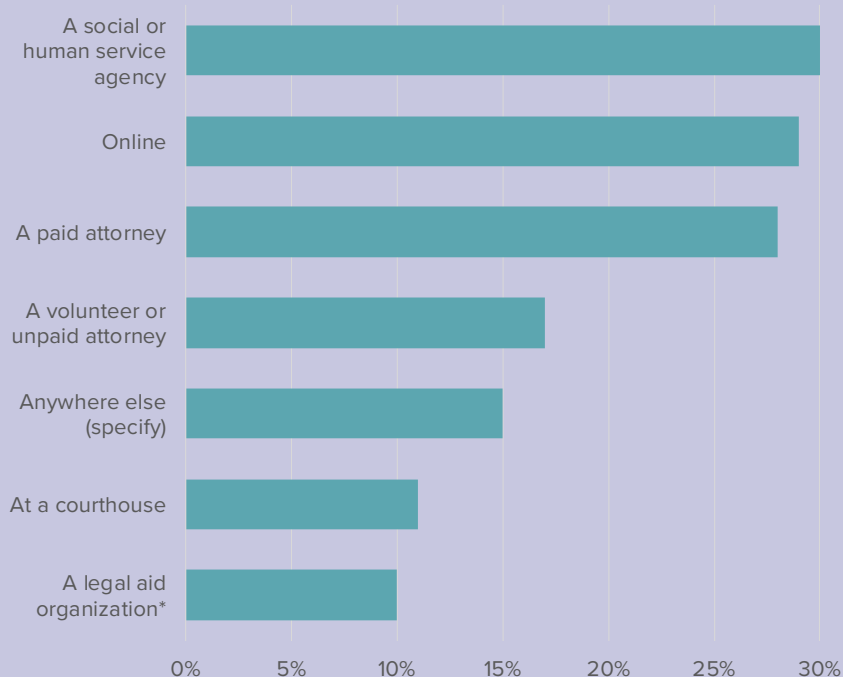
Language barriers can also pose a challenge.¹² While most Utahns speak English “very well” or “well,” 2% of lower-income Utahns struggle with English, and another 1% do not speak English at all.¹³ (See Figure 7.)

Courts provide interpreters, but only for hearings and proceedings, not for private consultation preparations.

Lastly, there is a shortage of attorneys in certain parts of the state, particularly in rural areas. While there are more than 7,000 attorneys along the Wasatch Front, there are no attorneys in Piute County, and only 28 in its neighboring counties of Beaver, Garfield, Sevier and Wayne. Another 10 of Utah’s 29 counties have fewer than 20 lawyers: Daggett, Duchesne, Emery, Grand, Juab, Kane, Millard, Morgan, Rich, San Juan and Sanpete.¹⁴ (See Appendix A for attorneys per county.) This shortage results in a local lack of exper-

Lower-income Utahns get legal help from a range of sources.

Figure 6: “Did you get legal help with the problem(s) from any of the following?” – Utah Foundation Phone and Online Random-Sample Survey of Respondents that Sought Help with a Legal Need



* The percentage for this option may be low, as there are numerous circumstances when people may not know that they are getting help from a legal aid organization; the full survey question was “A legal aid organization, such as Utah Legal Services or Legal Aid Society.”

Note: The percentages above are of those who were successful in getting help; they total greater than 100% since nearly half of respondents used more than one source of help.

Source: Utah Foundation Legal Needs Survey, phone and online responses.

Lower-income Utahns are more likely than higher-income Utahns to face language barriers in court.

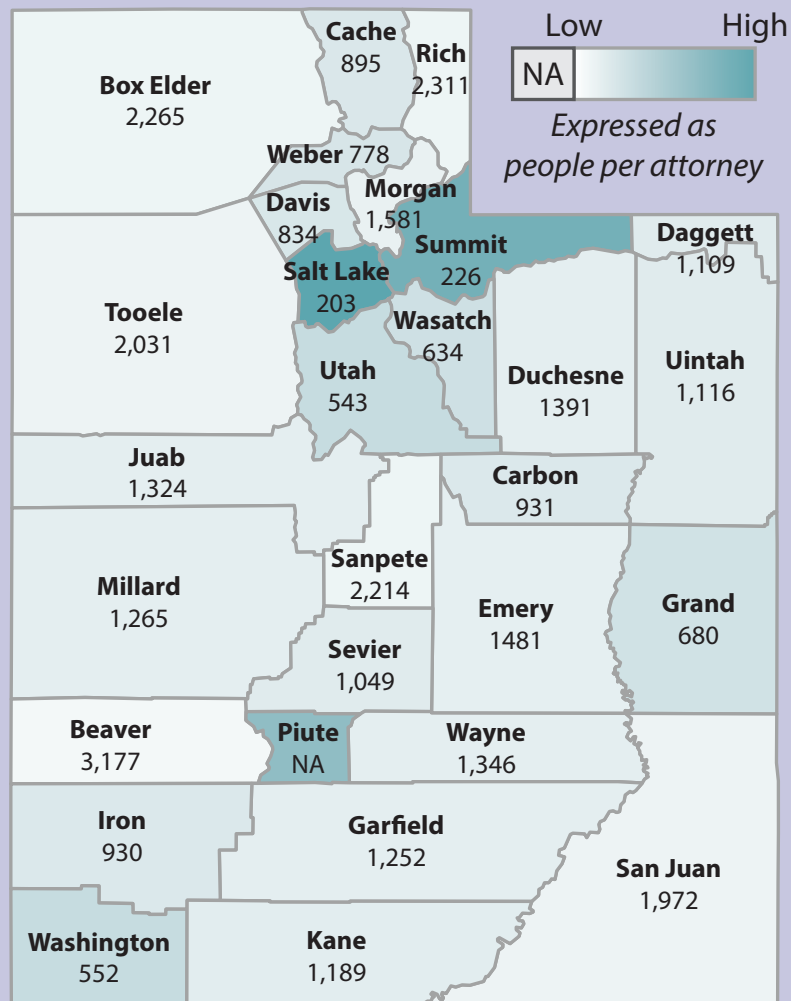
Figure 7: English Language Ability by Income Group, 2017

	Under 200%	Over 200%
Speaks only English	69%	81%
Speaks English “very well” or “well”	17%	10%
Speaks English but not well	2%	1%
Does not speak English	1%	0%
n/a (blank)	11%	7%

Source: IPUMS USA, University of Minnesota, www.ipums.org.

There is a wide range of attorneys availability among Utah counties, due in large part to rurality.

Figure 8: Density of Attorneys in Utah by County, 2017



Source: David McNeill, *Measuring the Legal Services Market in Utah*, *Utah Bar Journal*, Vol. 30, No. 5, Sep/Oct 2017.

tise for certain needs, which then leads to an increase in hours billed. In addition, attorneys might be willing to practice anywhere, but there is a cost associated with that, particularly due to transportation. Further, rural communities may be more likely to have overburdened attorneys, few lower-income legal assistance services and lawyers with conflicts of interest.¹⁵

When looking at the number of people per attorney, portions of the Wasatch Front and Washington County are highly represented, while several rural counties are not.¹⁶ In looking at the extremes, there is one attorney for every 203 people in Salt Lake County, but only one for every 3,177 people in Beaver County.

In addition, Utah has large geographic differences in its proportion of lower-income population. As few as 15% of people in Daggett County are lower income,

compared to nearly 50% in San Juan County.¹⁷ While a few rural counties are below the state's average in their proportion of lower-income Utahns, almost all rural counties have a large proportion of lower-income Utahns.

TYPES OF SUPPORT

People with legal needs may seek three types of assistance:

- Representation
- Legal Advice and Brief Service
- Information and Referral

Representation comes at the hands of licensed attorneys. This might be with a full-cost attorney, at a low-cost rate or pro-bono. When seeking legal assistance at a discounted rate, many services are offered for those earning under 200% of the federal poverty line. However, there are some exemptions. Older Utahns might find help even if their income is above the 200% line. Immigration services are often provided on a sliding scale basis. Services for protective orders in domestic violence cases are not limited to lower-income petitioners or plaintiffs, nor are most disability services.

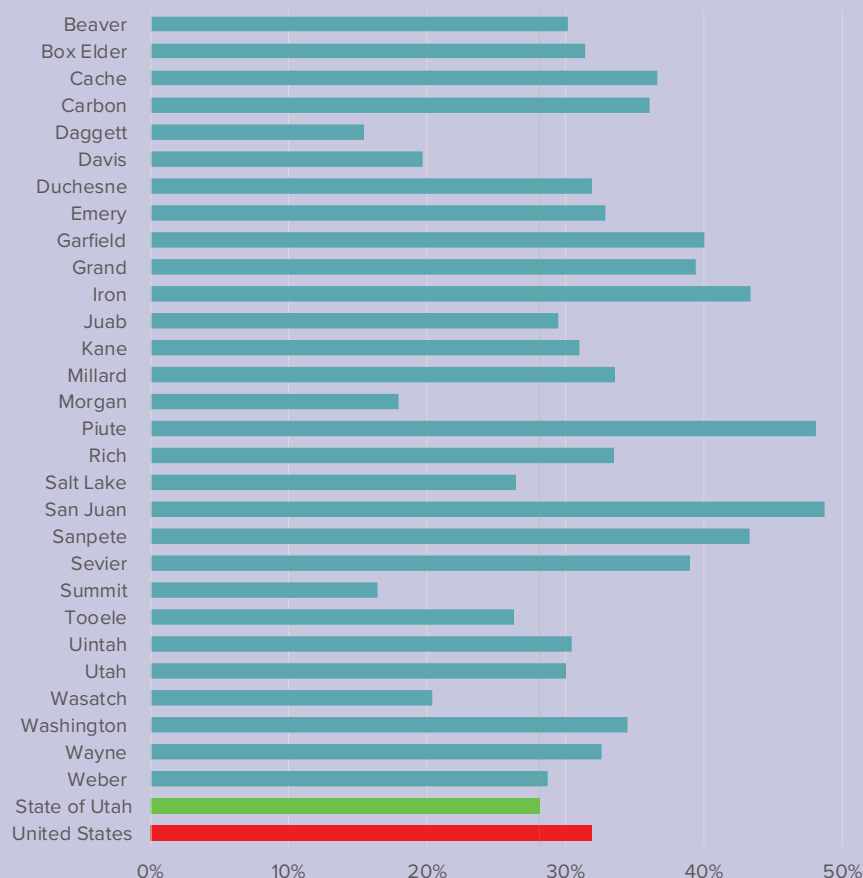
Legal advice and brief service may come from attorneys or from law students under the supervision of licensed attorneys. Additionally, in response to a needed market-based solution for the unmet needs of litigants, a task force created by the Utah Supreme Court in May 2015 recommended the creation of a new program called the Licensed Paralegal Practitioner (LPP). Through this program started in November 2018, LPPs are allowed to obtain licensure to assist clients with limited matters in practice areas that include: specific family law matters, such as temporary separation, divorce, paternity, cohabitant abuse, civil stalking, custody and support, or name change; limited landlord-tenant disputes, and; debt collection matters in small claims cases.

Information and referral can come from legal aid organizations, from nonprofits that specialize in specific issues, or from organizations that specialize in information and referral services.

Additionally, legal forms are available from the Utah Courts website and from the Online Court Assistance Program.¹⁸ However, people may not have the expertise to fill out the forms appropriately, particularly when special or unusual situations apply to them.¹⁹

Utah counties vary widely by their proportions of lower-income residents.

Figure 9: Percent of Individuals Under 200% of the Federal Poverty Line



Source: U.S. Census Bureau, American Community Survey. Utah Foundation calculations.

Legal Services Currently Provided

This report analyzes the legal needs for lower-income Utahns in 19 types of issue areas. Listed below are the issue areas and examples of each. They are further defined in the *Legal Needs* section of this report.

- **Employment:** Trouble with an employer, such as not being paid, being forced to work overtime, being fired unfairly, being in unsafe situations, being sexually harassed, etc.
- **Housing:**
 - **Rental housing:** Serious problem with a landlord, unfairly asked to move out, or not provided a safe, clean place to live.
 - **Housing ownership:** Problem with the lender or had the inability to pay property taxes.
 - **Mobile and manufactured homes:** Problem like being kicked out of a mobile home park, or a large increase in lot rent or park fees.
 - **Homelessness:** Turned away from a shelter or temporary housing, arrested, given a ticket, or stopped by police when homeless.
- **Financial issues:** Problem being harassed by a debt collection agency or with some type of scam or fraud, such as identity theft.
- **Public assistance:** Had lost or been denied governmental benefits such as Social Security, disability income, food, housing assistance or Medicaid.
- **Health law:** Overcharged on a medical bill, had trouble keeping insurance, or turned away and not treated by a doctor or hospital.
- **Public service legal issues:** Problem with public services, such as having serious problems accessing or been afraid to call the police, verbally or physically threatened by police, or needed to have something removed from a criminal record.
- **Family law:** Needed a divorce or legal separation, or had child custody or child support issues.
- **Domestic violence:** Physically, sexually or mentally abused by another household member, or had been stalked.
- **Discrimination:** Denied services, harassed, abused or unfairly treated because of race, ethnicity, religion, gender, sexual orientation, age or for other characteristics.
- **Disability rights:** Unfair treatment or discrimination related to that disability, such as not being given reasonable access to programs, services, activities or public places.
- **Adult care:** Trouble with a nursing home or other caretaker.
- **Immigration:** Problem getting residency, citizenship or work permits; receiving bad legal advice; afraid of calling the police; reporting discrimination or harassment; or applying for benefits because of immigration status.

- **Education legal issues:** Problems related to education, such as getting kicked out of school, or needed but could not get an Individualized Education Program.
- **Native American / American Indian tribal issues:** Legal problems related to tribal membership, such as their tribal affiliation or enrollment, a tribal dispute, living off the reservation, tribal recognition, or use of tribal or trust lands.
- **Military legal issues:** Problems related to that status, such as VA benefits, military discharge status, or problems getting an old job back after military discharge or returning from deployment.
- **Other legal issues:** Wills, guardianship, or powers of attorney.

Legal aid organizations provide services for these issues. During fiscal 2019, Utah organizations (see the note in Figure 10 for an organizations list) provided 43,525 Utah clients with legal service assistance. Another 21,881 “secondary” clients who are family members and householders also benefited from the primary clients’ assistance.²⁰

Family issues are the top-assisted form of legal aid provided in Utah. Immigration and domestic violence services were clearly second and third on the list of available legal services. Noticeably missing from the list are financial issues, particularly given that they comprise 62% of all cases that go to court. However, it is important to consider that many of the financial issues cases might involve small amounts due and which are heard in small claims court, or may simply be amounts due that have no other legal ramifications.

The areas of assistance do not necessarily show the breadth of the assistance available in each category. For instance, while clients with employment issues constitute only 2% of all legal aid organizations’ clients, there are other supports for people dealing with employment issues, such as the Utah Labor Commission.²¹

Legal aid groups provide the most assistance in family law cases, followed by immigration cases.

Figure 10: Legal Services Provided in Utah, by Type, 2019

	Clients	Secondary
Family law	31%	29%
Immigration	26%	20%
Domestic violence	13%	27%
Other legal services	12%	9%
Housing	9%	10%
Public benefits	4%	3%

Note: Figure includes issues with 3% or more of the proportion of services. These calculations include the services provided by the “legal-aid focused organizations” (except Nonprofit Legal Services) and “non-profits with legal aid programs” listed in Figure 13.

Source: Gathered from legal aid organizations around the state by Kai Wilson.

The issue areas of civil legal services vary by type of service: representation, legal advice & brief service, and information & referral.

Figure 11: Top Legal Services Provided in Utah, by Type of Support, 2019

Note: Figure includes issues with 3% or more of the proportion of services. These calculations include the services provided by the "legal-aid focused organizations" (except Nonprofit Legal Services) and "non-profits with legal aid programs" listed in Figure 13.

Source: Gathered from legal aid organizations around the state by Kai Wilson.

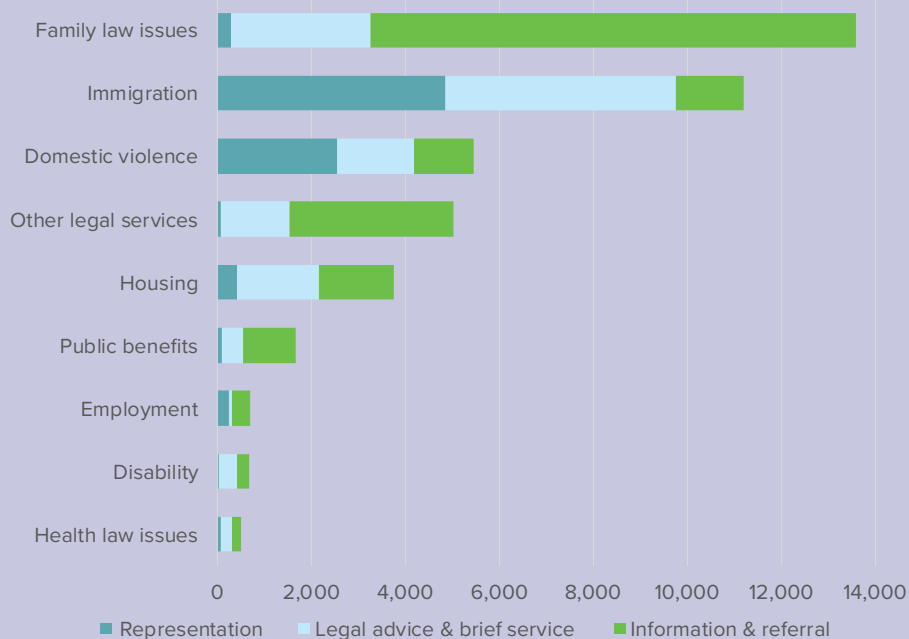
Representation	Clients
Immigration	56%
Domestic violence	30%
Housing	5%
Family law	3%
Employment	3%
Legal advice & brief service	
Immigration	35%
Family law	21%
Housing	12%
Domestic violence	12%
Other legal services	11%
Public benefits	3%
Information & referral services	
Family law	49%
Other legal services	17%
Housing	8%
Immigration	7%
Domestic violence	6%
Public benefits	5%

Legal services vary widely by number and type of support.

Figure 12: Number of Legal Services Provided in Utah, by Type of Support, 2019

Note: These calculations include the services provided by the "legal-aid focused organizations" (except Nonprofit Legal Services) and "non-profits with legal aid programs" listed in Figure 13.

Source: Kai Wilson.



When looking more closely at the three types of assistance, immigration and domestic violence top the list for legal representation from lower-income service providers. Immigration is also at the top for legal advice and brief service, followed by family law issues (such as divorce, custody and alimony). And nearly half of all information and referral services are for family law issues. (See Figures 11 and 12.)

SERVICE PROVIDERS

Utah civil legal services are provided from numerous organizations and locations throughout Utah. While only the top four metro areas have legal aid offices, most rural parts of Utah have access via toll-free numbers, clinics and circuit-riding attorneys who travel to a regular set of locations for court proceedings.

Organizations can include those that focus primarily on providing legal aid, nonprofit organizations that provide legal aid as part of their mission, and clinics and other resources that provide information, forms and referrals. (See Figure 13 for a list of organization by categorization.)

Legal Aid Only – Lower-Income Utahns

Utah Legal Services has been providing free legal help since 1976.²² There are offices in Salt Lake City, Ogden, Provo and St. George, with an outreach program that covers the whole state. To qualify for assistance, Utahns must be U.S. citizens, except for domestic violence victims. The program serves individuals earning under 200% of the federal poverty line, though in some cases a person can qualify without regard to the household's financial circumstances, such as in protective order cases. Utah Legal Services focuses on cases of family problems, public benefits assistance, housing and consumer issues. Specialized units also serve groups with special legal needs, including farm workers, Native Americans/American Indians and older Utahns.

A wide range of legal aid services and organizations exist to assist lower-income Utahns.

Figure 13: Services and Organizations Providing Legal Help in Utah

Legal-aid focused organizations

– Lower-income Utahns

Utah Legal Services

Legal Aid Society of Salt Lake

Disability Law Center

Timpanogos Legal Center

DNA People's Legal Services

– Any income level, sliding scale

Nonprofit Legal Services of Utah

Immigrant Legal Services

Nonprofits with legal aid immigration programs

Catholic Community Services

Holy Cross Ministries

International Rescue Committee

Comunidades Unidas

Moab Valley Multicultural Center

Clinics providing free brief legal advice

Information and referral agencies

2-1-1

Utah Community Action

Utah Courts Self Help Center

Utah State Law Library



UTAH LEGAL SERVICES – HOUSING CASE

Kristine, a single-mother diagnosed with multiple sclerosis who has an eight-year-old child diagnosed with neurofibromatosis, faced the looming threat of homelessness when a housing authority rescinded the family's Section 8 housing funding.

Kristine had moved into an accessible apartment with her landlord's approval. The housing authority did not authorize the move and as a result terminated her housing funds. Utah Legal Services was notified of the case when the pair were "literally a week away from going into a shelter."

Utah Legal Services was able to settle a third-party lawsuit against the housing authority, as well as a countersuit against the landlord, to ensure that Kristine was not forced to pay past-due rent charges.



UTAH LEGAL SERVICES – HOUSING CASE

David, a 62-year-old man with a disability, approached Utah Legal Services when he was served eviction papers from the mobile-home park he had lived in for 11 years. With no warning, management had decided that his home was a “recreational vehicle” instead of a “mobile home.” Because of this, he was told he was no longer eligible to stay in the park. After litigation, the court ruled the 41-foot home was by definition a mobile home and subject to the Mobile Home Park Residency Act, which requires good cause to terminate a lease. The case was dismissed, court fees were awarded, and David was allowed to stay in the park.

Legal Aid Society of Salt Lake has been providing free legal help since 1922. It provides services to lower-income families and individuals. Legal Aid Society assists adults and children who are victims of domestic violence to obtain protective orders and civil stalking injunctions from the court, regardless of their income or citizenship status.²³ Legal Aid Society provides full-service representation and limited representation during hearings in family law cases. In addition, it provides “pro se” clinics for litigants who are representing themselves. These limited assistance services are offered at the Matheson and West Jordan Courthouses. Legal Aid Society also provides “pro se” limited-representation services to clients in several counties during special self-represented hearing times.



LEGAL AID SOCIETY OF SALT LAKE – DOMESTIC CASE

Mary was a 22-year-old Utahn who had a two-year-old son and was six months pregnant when she sought legal aid. Her husband had been keeping her isolated in their apartment for three years. He would not let her drive, have a cell phone or go to prenatal checkups. He even controlled what – and if – she ate.

Mary contacted Legal Aid Society of Salt Lake for help. The divorce case that followed lasted almost two years and was peppered with incidents of threatening behavior on the part of Mary’s husband. The police recommended that Mary go into hiding, which she did for some time.

Mary’s Legal Aid attorney represented her through the whole ordeal, and in the end secured her divorce and full custody of her children. Since then, Mary has earned a paraprofessional degree. She now works at a firm in Salt Lake City and has an apartment for herself and her two children.



DISABILITY LAW CENTER – EMPLOYER ACCOMMODATION CASE

Disability Law Center had a client with significant PTSD from a violent crime. The client discussed scheduling accommodations with her employer under the Americans with Disabilities Act, but the employer told her that there were no part-time positions available. When the client missed an assigned shift of which she was unaware, the employer terminated her. The client was concerned about applying for any other jobs with a termination on her employment record.

After filing a complaint with the Equal Employment Opportunity Commission and alleging a failure to engage in the interactive process and failure to provide reasonable accommodations, Disability Law Center was able to review the employer's position statement and arrange for informal settlement negotiations. Disability Law Center secured the client a settlement agreement with a guarantee for a neutral reference from her former employer, to have her employment record reflect a resignation instead of an involuntary termination, and to have the company guarantee that she would be eligible to reapply for other positions at the company.

Disability Law Center has been providing services since 1978. Its legal services are available to people across the state. Services include help with abuse and neglect, access and rights, community integration, employment, and short-term assistance. It focuses on helping inmates, advocacy and making sure that all Utahns can have access to facilities and institutions.²⁴



DISABILITY LAW CENTER – EMPLOYER ACCOMMODATION CASE

Disability Law Center had a client who worked as a construction company flagger for approximately five months. The company had a practice of hiring employees during the busy season for construction and then laying them off each year. One December, the client tore her rotator cuff and fractured her collar bone. The employee made several requests to the company's HR manager for long-term disability benefits paperwork and an explanation of her benefits, but her requests were ignored. When she scheduled a meeting with HR to obtain the paperwork to request medical leave as well as short-term and long-term disability benefits, the HR professional did not arrive for the meeting. The client subsequently received a phone call from her manager, informing her that HR had instructed them to terminate her employment.

Disability Law Center filed a claim for wrongful termination and failure to provide reasonable accommodations. The company denied any discrimination, stating that the client was simply laid off in compliance with their typical procedures. With further discussion, however, the company's attorney acknowledged that the client should have been provided with access to disability benefits. Disability Law Center worked with the company's attorney to apply for these benefits retroactively. The client received full payment for all of her short-term disability benefits, backdated long-term disability benefits, continuing long-term disability benefits, as well as a modest amount of damages to cure the company's failure to provide the client with a reasonable accommodation and wrongful termination. The client has since been able to undergo surgery for her rotator cuff and collar bone with the necessary time and money to recover from these procedures.



DISABILITY LAW CENTER – EDUCATION / DISABILITY CASE

The parent of a 15-year-old student with intellectual disabilities attending school in a rural county contacted Disability Law Center because she had concerns regarding her son's Individualized Education Program (IEP) and special education services. When Disability Law Center reviewed his records, they discovered that his IEP included statements like "great kid," "loves Disney" and "likes to dance," but failed to provide any valuable information about the student. The student also had a completely blank transition plan, and his IEP stated that he would be retained at the middle school for two years rather than moving to high school alongside his peers. Disability Law Center assisted the parent in filing a state complaint. The Utah State Board of Education found against the district and ordered corrective action, including a full re-evaluation, training for the district on a variety of topics, and more than 40 hours of compensatory education.



DISABILITY LAW CENTER – ELDER NEGLECT / NURSING HOME / DISABILITY CASE

Disability Law Center had a client in a nursing home who suffered numerous strokes, was diagnosed with dementia, and had very limited mobility. The nursing home issued the client a discharge notice alleging that she was a safety threat to staff and other residents. The nursing home further alleged that the client hit, kicked and pinched others – all allegations the client denied. Disability Law Center staff met with the client and agreed to file a Medicaid appeal on her behalf. After reviewing numerous records, it became clear that the client's condition would not have allowed her to hit, kick and pinch as the nursing home alleged. Further, the records demonstrated that she had several needs that were not being addressed through proper care planning by the facility. After an extended exchange with the nursing home's counsel, it became clear that Disability Law Center would be able to effectively demonstrate during a Medicaid hearing that the facility's reasons for discharge were frivolous. The nursing home withdrew the discharge notice before the hearing date and engaged in care planning with the client to fully address her needs.

Timpanogos Legal Center is a newer organization that provides legal services to lower-income Utahns. It is a small group of four full-time staff attorneys and other attorneys who provide volunteer pro-bono services.²⁵ The Center provides walk-in services in Utah County as well as online assistance across the state. It provides unbundled legal services, often handling just a portion of people's needs, but its attorneys meet with clients to provide representation in court where and when possible.

DNA People's Legal Services has been providing free, civil legal services since 1967. It supports cases in tribal, state and federal courts to qualifying low-income residents living in geographically isolated portions of Arizona, New Mexico and Utah of various tribes, including the Navajo Nation. DNA focuses on helping low-income families, elders, and victims of abuse, exploitation and discrimination,



DNA PEOPLE'S LEGAL SERVICES – PUBLIC SERVICES / NATIVE AMERICAN CASE

An elderly Navajo woman needed to renew her driver's license. She learned in the process that the federal government and the state motor vehicle department had three different birth years for her. With no way to prove her birth year, she feared losing her driver's license. This was of particular concern as she needs to drive to purchase groceries and take herself and her husband to medical appointments; he can no longer drive and is dependent on her for transportation. DNA was able to help the woman secure a correct birth certificate, which allowed her to renew her driver's license.

and especially people in these groups who do not speak English well. Most clients live below the federal poverty level, although DNA assists victims of domestic violence regardless of income.²⁶

Legal Aid Only – Any Income Level, Sliding Scale

Nonprofit Legal Services of Utah provides counsel and representation to the non-profit community in Utah, as well as to individuals with small claims, employment law issues, landlord-tenant disputes, contract disputes, debt collection problems and family law issues. Rates are based upon clients' ability to be able to pay, charging on a sliding scale from \$75 per hour for clients under 200% of the federal poverty line, up to \$150 an hour for those above 400%. Nonprofit Legal Services requires clients to pay a retainer equal to 15 hours of work or 50% of the flat fee agreement at the time the engagement begins.

Immigrant Legal Services was created in 2016 to help immigrants by providing pro-bono or low-cost legal services with the help of donations and grants "based on each immigrant's economic situation and type of case."²⁷ It handles a wide variety of immigration cases, including services for victims of violent crimes, asylum seekers and families seeking unity. It served 1,160 people in 2018, during which about two-thirds of its revenue came from client fees, with the remainder from grants and donations.

Nonprofits with Legal Aid Programs

Catholic Community Services Utah (CCS) has been providing services to people along the Wasatch Front since 1945. The purpose of its legal program is to provide full legal representation to immigrants and refugees when they submit immigration applications or upgrade immigration status. CCS also provides individual consultations to immigrants, refugees, and U.S. citizens who have questions about immigration laws, procedures and basic eligibility. CCS employs immigration attorneys, legal representatives and an immigration case manager who file more than 1,000 immigration applications every year for permanent residency (green cards), U.S. citizenship, reuniting close family members, and replacing or renewing identity documents issued by immigration.²⁸ The CCS legal staff is also available to consult refugees and immigrants who are placed in deportation proceedings. CCS uses about 5% of its total budget for legal representation.



CATHOLIC COMMUNITY SERVICES – IMMIGRATION CASES

CCS collaborates with the Utah Division of Child and Family Services (DCFS) by assisting kids in custody who need immigration assistance. In 2018, a DCFS staff member contacted Catholic Community Services about a young woman, “Pilar,” who was turning 18 but could not communicate due to developmental disabilities. CCS worked closely with DCFS to apply for an immigration benefit on the client’s behalf. Pilar was able to avoid potential deportation.

CCS also helped a woman, “Lupe,” who was caring for a mother suffering from dementia. Lupe’s mother was able to sign her own immigration application, but Lupe feared that the dementia would progress, especially since she had recently lost her spouse. CCS helped Lupe learn how to collect the medical waiver needed to be sure the client would not have to take the citizenship test. CCS also educated Lupe about the adult guardianship process and how to petition for guardianship if the dementia did get worse. Lupe was able to contact the CCS attorney for guidance during the guardianship process and then secure the letters of guardianship once necessary.

In August 2019, CCS was able to represent both Pilar and Lupe before Immigration Court and effectively advocate for them to make sure that U.S. Citizenship and Immigration Services waived both the test and the oath so that the appointed guardians for both clients could obtain the citizenship certificate the clients needed for benefits without delay.

Holy Cross Ministries has been providing community services since 1875. It now provides legal immigration assistance to clients across Utah, focusing on low-income families that are seeking help with legal immigration (primarily immigrant victims of crime).²⁹ The services offered are consultations, legal support for immigrant victims of violence, support for humanitarian and temporary status applicants, family reunification assistance, and citizenship services. Holy Cross also covers fees associated with naturalization.

International Rescue Committee of Utah helps resettle refugees fleeing persecution and war. In addition, the Utah chapter provides low-cost immigration legal services and citizenship assistance.³⁰ Services include: help in obtaining Lawful Permanent Resident Status (or “green cards”); help for Lawful Permanent Residents to apply for citizenship; help reuniting refugee and asylum families; assistance with Deferred Action for Childhood Arrivals and Unlawful Presence Waivers. These services are often provided by non-attorney “Accredited Representatives.”³¹

Comunidades Unidas is a nonprofit organization that has been serving Utahns since 1999. It provides direct services to more than 5,000 individuals per year. Its legal clinic offers a range of low-cost legal services for those looking to apply for, renew or update their legal status. The organization serves people across the state.³² These services are provided by non-attorney Bureau of Immigration Accredited Representatives.

The Moab Valley Multicultural Center works in Moab and its surrounding rural areas, focusing on immigrant, minority, indigenous and vulnerable populations of all ages. It advocates, educates and collaborates with its community to remove cultural, language or economic barriers. As part of this, it provides immigration-related legal needs services. These services are provided by non-attorney Bureau of Immigration Accredited Representatives.

Clinics Providing Free Brief Legal Advice

A number of organizations provide free, brief advice for the legal needs of lower-income Utahns. These services are typically available for one to two hours between one and three times per month. They are often staffed by volunteer lawyers and/or students with volunteer lawyer supervisors. In some cases, they are staffed by paralegal professionals who do not give “legal advice” per se, but provide assistance in legal matters. The S.J. Quinney College of Law at the University of Utah, the J. Reuben Clark Law School at Brigham Young University and others support these services. This report does not include any estimate of the number of people helped through such programs.

Information and Referral

Utah Court’s Self-Help Center provides free legal information on rights and responsibilities and to help people resolve their legal problems on their own. This includes information on legal processes, forms and referrals to legal aid organizations. Self-Help Center staff attorneys do not give legal advice or represent people in court, but they can:

- Answer questions about the law, court process and options.
- Provide court forms and instructions and help completing forms.
- Provide information about cases.
- Provide information about mediation services, legal advice and representation through pro-bono and low-cost legal services, legal aid programs and lawyer referral services.
- Provide information about resources provided by law libraries.³³

The Utah State Law Library has existed in some form since the Utah Territory was established. It serves the legal information needs of Utah’s courts, executive agencies, legislature, attorneys and the public. The library collection is located in Salt Lake City, but library services are available to everyone.³⁴

United Way of Salt Lake’s 2-1-1 information and referral service operates 24 hours per day to provide information and referrals to all Utahns.

Utah Community Action is part of the Community Action network that operates across the U.S. Over the past year it provided information and referral to 809 lower-income individuals.

Many other organizations also provide some limited information and referral services.

Mediation

Many Utahns seek out mediation as an alternative to legal services. There is one large mediation firm in the state and numerous smaller ones.

Utah Dispute Resolution is the state’s largest mediation provider, with services to lower-income Utahns for small claims and family cases, in addition to providing information and referral services. It provided 673 domestic law mediations in fiscal 2019.



2-1-1 INFORMATION AND REFERRAL

In addition to the 2-1-1 survey, Utah Foundation analyzed information and referral data provided by 2-1-1. During calendar year 2019, 2-1-1 received a total of 2,003 legal-needs calls that led to a total of 4,630 referrals.* Well over half of the calls were from people in Salt Lake County (1,221), followed by Utah County (211), Weber County (210), Davis County (166) and Washington County (52). Collectively, these counties accounted for 93% of the calls, while accounting for 81% of the state's population. Women made more than three-quarters of the calls (76%). The vast majority of the calls (85%) were with English speakers, with another 11% with Spanish speakers, and the remainder in other languages.

Taking a look at the top five of referrals based on their 2-1-1 need codes: 389 referrals were for legal counseling (19% of total calls), 372 referrals were for landlord/tenant dispute resolution; 329 referrals were for legal representation; 122 referrals were for child custody/visitation assistance; and 121 referrals were for advocacy-related issues. Collectively, the number of calls for the top five need code referrals accounted for 67% of all legal needs calls – 1,333 calls in all.

When excluding referrals for general legal services such as legal counseling, representation and advocacy, the top issues were landlord/tenant dispute resolution and family law. (See Figure 14.)

Renter and family legal needs are the top legal information & referral issues for the largest information & referral organization in the state.

Figure 14: Referrals by Civil Legal Issue Type, 2019

Source: Utah Foundation analysis of 2-1-1 referral data.

Civil Law Issue	Count	Percent
Landlord/tenant dispute resolution	372	34%
Family (child custody, divorce, child support, etc.)	294	27%
Immigration	99	9%
Domestic violence (including protective orders)	59	5%
Employment discrimination assistance	41	4%
Veteran benefits assistance	38	3%
General legal aid	36	3%
Elder law	26	2%
Housing discrimination assistance	20	2%
Protection and advocacy for individuals with disabilities	11	1%
Other	96	9%

Utah Community Action Program provided lower-income mediation in 225 landlord tenant/housing cases.

Mountain Mediation provides mediation services for small claims and family cases, in addition to providing information and referral services. Most of its services are provided in Summit and Wasatch counties.

Utah Court's Self-Help Center staff attorneys can provide information about mediation services – in addition to aid discussed previously.

In addition, there are numerous mediation clinics at locations around the state.

FUNDING

Utah Legal Services accounts for nearly half of the total spending for legal aid in Utah, and Utah Legal Services, Disability Law Center and Legal Aid Services together account for 85%.³⁵ The three main funding sources are the Legal Services Corporation, U.S. Department of Justice funding and the State of Utah, followed by private funds, earned revenue and the Utah Bar Foundation.

The Legal Services Corporation “is an independent nonprofit established by Congress in 1974 to provide financial support for civil legal aid to low-income Americans.” It distributes grants to nonprofits delivering civil legal aid. The grants are based on poverty population data provided by the U.S. Census Bureau. The funds target lower-income Americans under 125% of the federal poverty line.

The Legal Services Corporation estimates that more than 60 million Americans are eligible for legal aid under its guidelines. It reports that its \$385 million in 2016 funding assisted 1.8 million people nationwide. This, it concludes, shows that the “gap between the number of people who need legal services and the resources available to meet their needs is enormous.”³⁶

According to Congressional Research Services, the Legal Services Corporation is the largest funder in the United States, funding approximately 38% of civil cases for lower-income Americans.³⁷ Congressional Research Services estimates that Utah is one of 12 states where LSC funds more than half of all civil legal services. (Four of Utah’s neighboring states – Arizona, Idaho, Nevada and New Mexico – receive a similarly high percentage of funding from LSC.)

In addition, the U.S. Department of Justice provides grants through the Victims of Crime Act fund.

LOWER-INCOME UTAHNS

In Utah, many civil legal aid organizations support households beyond the 125% of the federal poverty line maximum supported by funding from the LSC, to 200% of the line. In 2017, about 27% of Utah residents earned below 200% of the federal poverty line, compared to over 32% nationally.³⁸ (See Figure 15.)

Utah’s lower-income residents are different in many ways than Utah’s higher-income residents. Utah’s racial and ethnic make-up is one difference. When looking at ethnicity, nearly 23% of people under 200% of poverty identify as Hispanic/Latino, two-thirds of whom

Utah has a smaller proportion of lower-income residents than does the nation as a whole.

Figure 15: Population Under and Over 200% of Poverty, Utah and U.S., 2017

	Number	Percent
United States		
Under 200%	105,440,763	32%
Over 200%	221,726,676	68%
Utah		
Under 200%	853,437	27%
Over 200%	2,307,668	73%

Source: IPUMS USA, University of Minnesota, www.ipums.org.

Utah's lower-income population is more diverse racially and ethnically than its higher-income population.

Figure 16: Race and Ethnicity of Population, by Income (separated by 200% of poverty level), Utah, 2017

	Under 200%	Over 200%
Race		
White	79.7%	88.1%
Black/African American	2.4%	0.9%
American Indian	2.1%	0.9%
Asian or Pacific Islander	3.3%	3.1%
Other	8.7%	3.7%
More than one major race	3.8%	3.3%
Ethnicity		
Non-Hispanic/Latino	77.5%	88.8%
Hispanic/Latino	22.5%	11.2%

Source: IPUMS USA, University of Minnesota, www.ipums.org.

originate from Mexico.³⁹ (See Figures 16.)

Further, lower-income Utahns have far less education than their higher-income peers. Half of those under 200% of poverty max out with a high school diploma, while only a third of those over 200% of poverty have only a high school diploma. Higher-income Utahns are nearly twice as likely to have completed four years of college.

This report includes many examples of these differences throughout the document in relevant sections when the data are available.

Utah's lower-income population is less educated than its higher-income population.

Figure 17: Educational Attainment, Age 25 and Over, by Income (separated by 200% of poverty level), Utah, 2017

	Under 200%	Over 200%
No schooling	1.7%	0.5%
Grade 12 or less	49.9%	33.9%
1-2 years of college	26.8%	26.9%
Bachelor's degree	15.5%	24.9%
Graduate degree	6.1%	13.8%

Source: IPUMS USA, University of Minnesota, www.ipums.org.

LEGAL NEEDS

For the Utah Foundation legal needs survey of a random sample of 900 lower-income Utahns, households experienced a total of 1,322 legal issues for an average of nearly one and one-half legal issue types per household. Nearly 43% of households reported no legal issue, while nearly 23% reported one issue type. (See Figure 18.)

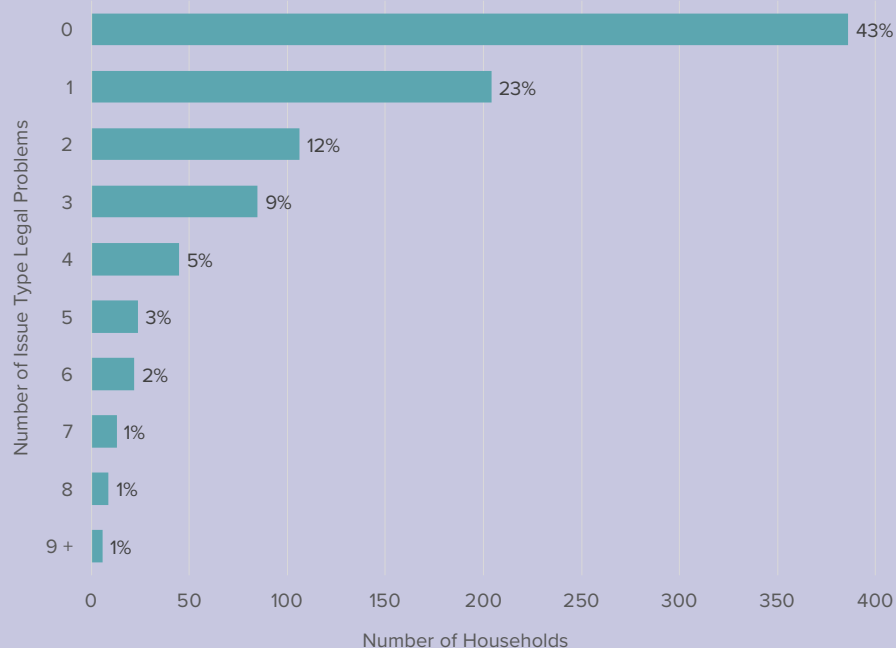
Because of time constraints in administering the phone survey, the online portion of the random-sample survey provided more examples to respondents of potential legal needs. Accordingly, they were more likely to indicate that they had legal issue types. In fact, phone respondents were twice as likely as online respondents to indicate that they had no legal needs whatsoever. (See Figure 19.) Online respondents were much more likely than phone respondents to indicate that their households had two or more legal issue types. On average, online random-sample respondents had 2.4 legal issue types, compared to just one for phone respondents.

Many respondents had several legal issues within the 19 issue types. For instance, a person might have trouble with an employer scheduling too many overtime shifts, with another person in the household having the same problem – or a different problem – with an employer. While these are categorized as one issue type, they are multiple legal issues within the same household. Like with legal issues types, online random-sample survey respondents had more than twice as many legal issues per household than did phone respondents.

The 2-1-1 survey provides additional data not available from the statewide random-sample survey since it was administered in Spanish and English to people above and below 200% of poverty. (However, the sample of Spanish survey respondents is too small to analyze

Most lower-income households have at least one civil legal needs issue type – and nearly a quarter have three or more issues.

Figure 18: Number of Issue Types per Household, Random-Sample Survey

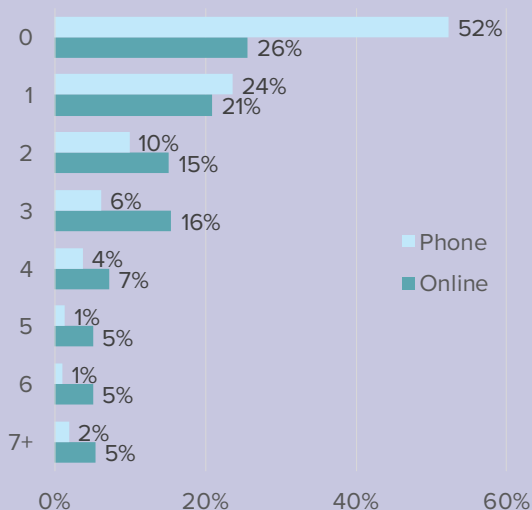


Note: Survey questions asked about 19 issues types.

Source: Utah Foundation.

Households that took the random online survey were more likely than random phone respondents to indicate that they had two or more issue types.

Figure 19: Number of Issue Types per Household, Random-Sample Survey



Source: Utah Foundation.

In terms of legal needs per households, Spanish-survey takers look more like English-survey takers that are from higher-income households than they do English-survey takers that are from lower-income households.

Figure 20: Number of Issue Types per Household, Online 2-1-1 Survey Sample



Note: "FPL" is the federal poverty line.

Source: Utah Foundation.

on its own.) These data show that while only 9% of the English survey respondents under 200% of poverty had no legal needs, nearly one-third of people above 200% of poverty had no legal needs. Additionally, nearly one-third of Spanish-survey respondents indicated that they had no problems.

When analyzing the 19 total issue types by their overall likelihood of legal needs, financial legal issues tops the list for the random-survey sample. Figure 21 shows the percentages of legal needs per respondent household by issue type.

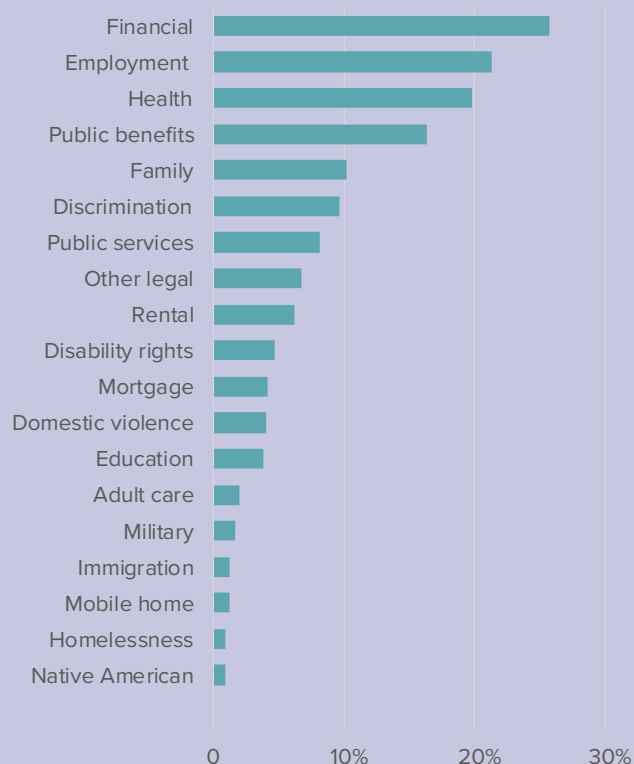
It is important to note that of the 19 legal needs categories, 10 questions

Financial legal needs are clearly the biggest issues for lower-income households, followed by employment and health care legal needs.

Figure 21: Percent of Respondents' Households with a Specific Need, all Random Sample Survey Responses

Note: Legal issues are divided by the total number of survey respondents, except the "Homelessness" and "Native American" bars, which are online-only responses weighted to be comparable to the other 17 issue types.

Source: Utah Foundation.



were not asked of all respondents. For instance, if a householder had not lived in a rented apartment or home in the previous 12 months, the respondent was not asked about rental issues. Approximately 39% of respondents were renters. Nearly half had mortgages. Only 5% of respondents had resided in manufactured housing during the preceding 12 months. So while just over 1% of all households had manufactured housing legal needs issues, 27% of households in manufactured housing had manufactured housing-related legal needs. (See Appendix B for more details.)

In addition, approximately one-third of respondents' households included a person with disabilities and one-third included an older Utahn (sixty-five years of age or older). Smaller proportions have served in the military or were born outside of the U.S. Lastly, only online respondents answered questions about homelessness issues and Native American or American Indian tribal issues. Of the random-sample online respondents, 11% of households had someone that has been homeless in the preceding 12 months, and 6% had someone that identified as Native American or American Indian.

LEGAL NEEDS GAP

While existing legal services provide support for lower-income Utahns, analysis of Utah's civil legal system shows a large unmet need. In 2019, just over 40,000 lower-income Utahns received some type of legal aid. Utah Foundation's survey suggests that lower-income Utahns' legal problems might total over 240,000. This leaves an enormous legal needs gap. As a result, the 26% of Utahns living at or below 200% of the federal poverty line may find their legal needs insurmountable. (See Figure 22.)

Large legal needs gaps exist between the services provided and the number of problems households experience.

Figure 22: Civil Legal Assistance (2019), Problems (2019), and Needs Gap, Households

	Assistance provided to clients*	Number of problem areas, households†	Legal needs gap
Financial	n/a	42,570	42,570
Employment	694	35,145	34,451
Health law	n/a	32,670	32,670
Public benefits	2,171	27,060	24,889
Discrimination	247	16,005	15,758
Public services	n/a	13,365	13,365
Housing	3,759	16,500	12,741
Disability rights	426	7,755	7,329
Education	153	6,270	6,117
Other legal	5,023	11,055	6,032
Adult care	n/a	3,290	3,290
Family	13,584	16,830	3,246
Military	n/a	2,805	2,805
Native American	14	1,410	1,396
Domestic violence	5,456	6,600	1,144‡
Immigration	11,193	1,980	(9,213)‡
Total	42,720	241,310	198,590

* 49% of "assistance provided in 2019" was in the form of information and referral services. Please note that some assistance may be duplicated; clients may be counted more than once if referred to other clients. See pages 9 and 10 for more details. Note that this is clients only, not secondary clients, which are typically in the same household as the client.

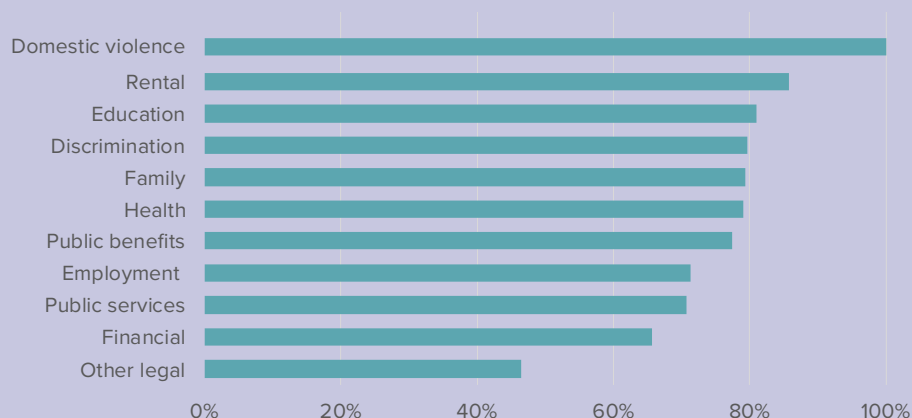
† The number of problem areas is an estimate of the percentage of random-sample survey respondents with a problem area type multiplied by the estimated number of households, multiplied by 66% – the survey respondents who perceived that their legal need "wasn't a big enough problem" or that they "didn't need help." See page 36 for more details.

‡ Some households may not respond that they need immigration help for fear of a lack of anonymity in the survey.

Source: Kai Wilson data and Utah Foundation random-sample survey. Utah Foundation calculations.

Domestic violence is – as expected – at the top of the list of civil legal needs by how much they affect the household.

Figure 23: Severity of the Legal Needs: “How much did the problem affect you or anyone in your household? Not at all, a little, somewhat, a lot,” showing that issue affected household “somewhat” or “a lot,” Online Random Survey Responses



Note: Figure does not include issues with a small sample size.

Source: Utah Foundation.

Legal Need Severity

The survey asked respondents with legal issues how much the issue affected the household, from “not at all” to “a lot.” When analyzing the issue by whether there was “somewhat” or “a lot” of effect, domestic violence and four other questions with smaller sample sizes (since only a portion of respondents answered these questions) rose to the top.

Only “other legal” issues and two other questions with smaller sample sizes were below 50% in terms of severity.

Legal Needs by Type

Employment. Employment is often directly related to poverty status. Unless households have other sources of income, such as assistance from parents, public benefits or retirement savings, the lack of employment can put a household below 200% of the poverty line. Those not in the labor force and unemployed are far more likely to be lower income. However, for those lower-income people between 18 and 64 years of age, well over half are employed (compared to about four-in-five of those higher-income Utahns).

The survey asked whether respondents had trouble with an employer, such as not being paid, being

Lower-income Utahns are more likely to be unemployed and out of the labor force altogether.

Figure 24: Employment Status by Age and Income (separated by 200% of poverty level), Utah, 2017

	Employed	Unemployed	Not in labor force
18-24			
Under 200%	66%	6%	28%
Over 200%	79%	4%	17%
25-64			
Under 200%	58%	4%	38%
Over 200%	83%	1%	16%
65+			
Under 200%	7%	1%	93%
Over 200%	22%	0%	78%

Source: IPUMS USA, University of Minnesota, www.ipums.org.

forced to work overtime, being fired unfairly, being in unsafe situations, being sexually harassed, or something similar to these problems. Approximately 21% of households experienced some type of employment issue in the previous 12 months.

Among the responses from the more detailed online random-sample survey, the most common issue was that employees were forced to work overtime or “the bad shifts,” followed by the issue that an employer “did not pay wages, overtime or benefits, or did not pay them on time.” (See Figure 25.)

Housing

As noted, the survey divided the housing issue into four separate questions: rental, ownership, manufactured housing and homelessness. Respondents only answered questions related to their own households’ living situations in the past 12 months.

In Utah, about 30% of households are renters.⁴⁰ Their median gross rent is about \$1,043. About 44% of Utah households that are renting spend more than 30% of their income on housing costs.⁴¹

Of the 70% of households that own their home, more than two-thirds had a mortgage.⁴² Of the nearly half of Utahns with a mortgage, their median “selected monthly owner costs”⁴³ total \$1,531, while those without a mortgage pay less than one-third of that amount (\$491), mostly on taxes and utilities.⁴⁴ Among those spending more than 30% of their income on housing costs, 23% of owners with a mortgage do, compared to 8% without a mortgage.

In terms of employment-related legal issues, being forced to work overtime and bad shifts is the most common complaint.

Figure 25: Employment Legal Issues, Online Responses

	Random sample	2-1-1 sample
Were forced to work overtime or the bad shifts	29%	19%
An employer did not pay wages, overtime or benefits or did not pay them on time	22%	20%
Experienced working conditions that were unsafe or unhealthy	16%	18%
Were sexually harassed , discriminated against or frightened by a supervisor or coworker	15%	12%
Were unfairly fired from a job	11%	18%
Were injured on the job because an unsafe or unhealthy condition	5%	7%
Were not given worker compensation benefits	1%	6%
Total respondents with an issue	36	483

Note: There are a total of 316 random-sample online survey responses and 832 2-1-1 online survey responses.

Source: Utah Foundation.

Renters spend less than those with a mortgage on monthly housing costs, but are more likely to spend more than 30% of their incomes on housing.

Figure 26: Housing Tenure, Costs and Percent of Income Spent on Housing Costs, Utah, 2018

	Number	Percent	Monthly housing costs	Spend 30% or more on costs
Renter occupied	294,908	30%	\$1,043 [†]	44%
Owner occupied	703,983	70%	n/a	n/a
mortgage	491,897	49%	\$1,531*	23%
w/out mortgage	212,086	21%	\$491*	8%

* Gross rent – median.

[†] Selected monthly owner costs – median (see endnote 43 for a definition).

Note: There were 998,891 “occupied units” in 2018 in Utah.

Source: U.S. Census Bureau, American Community Survey, 2018, one-year data, S2501 Occupancy Characteristics, DP04 Selected Housing Characteristics. Utah Foundation calculations.

Lower-income Utahns at all income levels are (as expected) far more likely to rent their housing.

Figure 27: Ownership of Dwelling, by Age and Income (separated by 200% of poverty level), Utah, 2017

	18-24		25-64		65+		All*	
	Under 200%	Over 200%	Under 200%	Over 200%	Under 200%	Over 200%	Under 200%	Over 200%
Rented	64.7%	28.5%	46.8%	19.6%	22.0%	8.3%	47.8%	17.8%
Owned	22.6%	71.4%	47.2%	80.3%	71.3%	91.6%	46.7%	82.2%
N/A	12.7%	0.0%	6.0%	0.1%	6.8%	0.1%	5.5%	0.1%

*Includes children 17 and under.

Source: IPUMS USA, University of Minnesota, www.ipums.org

Lower-income Utahns tend to spend more than \$1,000 per month on rent.

Figure 28: Monthly Gross Rent by Income (separated by 200% of poverty level), Utah, 2017

	Under 200%	Over 200%
\$1-\$500	8%	1%
\$501-\$1,000	37%	28%
\$1,001-\$1,500	38%	41%
\$1,501+	17%	30%

Source: IPUMS USA, University of Minnesota, www.ipums.org

Survey respondents were more likely to be homeowners.

Figure 29: Housing Situation; “In the past 12 months, has anyone in your household...”
Random-Sample Survey Respondents

	Percent
Rented a house, apartment, or room	48%
Owned a home or had a mortgage	59%
Owned, purchased, or rented a mobile or manufactured home	6%
Homeless or needed to temporarily stay with friends due to lack of housing	5%*

* This question was only asked of the 312 online respondents.

Note: This exceeds 100% because about one in five households had householders living in different situations in the preceding year, such as owning and renting, owning and homeless, or renting and homeless, and a few respondents had people in three different situations.

Source: Utah Foundation.

Lower-income households are much more likely to be renters than their higher-income counterparts. This holds true across age categories.

As noted, median rent is just above \$1,000 for Utahns. Rent tends to be less expensive for lower-income households than for higher-income ones. However, 55% of those lower-income households are still spending more than \$1,000 on rent per month.

Owner costs average just above \$1,500 in Utah. While costs tend to be higher for higher-income earners, nearly 30% of those lower income earners spend more than \$1,500 per month on owner costs.⁴⁵ (See Figure 28.)

Of the random-sample survey respondents, a majority were or had been homeowners (59%), while nearly half were or had been renting in the preceding year (48%). Another 6% were or had been living in mobile or manufactured homes. Lastly, of those 312 online respondents, 5% had been “homeless or needed to temporarily stay with friends due to lack of housing.” This exceeds 100% because about one in five households had householders living in different situations in the preceding year, such as owning and renting, owning and homeless, or renting and homeless, and a few respondents had people in three different situations.

Rental Housing Issues. The survey asked whether respondents had a serious problem with a landlord, were unfairly asked to move out, or were not provided a safe, clean place to live where everything worked. Approximately 16% of renters had at least one such issue.

Of the more detailed online random-sample survey, half of renters with an issue “had a landlord that didn’t provide a safe, clean place to live where everything worked.” Over a third of those with an issue responded that they had been unfairly asked or threatened with eviction. (See Figure 30.)

Rental housing issues were far more likely to be a problem for the 2-1-1 survey respondents than for the random-sample survey respondents. When looking only at the renter respondents from each group, 26% of random-sample survey renters had rental housing legal problems, compared to 60% of 2-1-1 renters.⁴⁶

Housing Ownership Issues. The survey asked whether respondents had a problem with the lender or had the inability to pay property taxes. Approximately 9% of mortgage-paying homeowners had such an issue. Among the 2-1-1 survey respondents, 16% of mortgage-payers has such an issue.

Mobile Homes and Manufactured Housing Issues. The survey asked whether respondents experienced any “problems like being kicked out of the mobile home park, or a large increase in lot rent or park fees.” Approximately 27% of respondents who lived in mobile or manufactured housing had such an issue. For the 61 respondents who lived in mobile or manufactured housing that took the 2-1-1 survey, 30% experienced such problems.

Homelessness. The homelessness question and its supplemental questions were not included in the phone survey due to time constraints and the unlikelihood of garnering many results by phone. The question asked whether anyone in the household has been “homeless or needed to temporarily stay with friends due to lack of housing.” Over 11% of the online random-sample survey respondents answered yes. Since Utah Foundation received fewer than 10 responses of problems for the online random-sample survey, results are not reported. However, for the 2-1-1 survey respondents who indicated that someone in the household had experienced homelessness in the preceding 12 months, they were asked if anyone had “been turned away from a shelter or temporary housing” or “been arrested, given a ticket or stopped by police when you were homeless.” They most often reported being turned away from shelters and temporary housing. (See Figure 31.)

Most renters with a housing problem had an issue with the landlord not providing a safe, clean place to live where everything worked.

Figure 30: Renters with Housing Issues, Online Survey Respondents

	Random sample	2-1-1 sample*
Had a landlord that didn’t provide a safe, clean place to live where everything worked	50%	40%
Been unfairly asked to move out or been threatened with being kicked out	36%	38%
Had a landlord threaten or act aggressively	14%	21%
Total respondents with an issue	36	322

* Total doesn’t add to 100% due to rounding.

Note: There are a total of 316 random-sample online survey responses and 832 2-1-1 online survey responses.

Source: Utah Foundation.

Most households with someone experiencing homelessness reported that the person had “been turned away from a shelter or temporary housing.”

Figure 31: Homelessness Issues, Online Survey Respondents

	Random sample	2-1-1 sample
Been turned away from a shelter or temporary housing.	*	61%
Been arrested, given a ticket or stopped by police when you were homeless.	*	39%
Total respondents with an issue		58

* Since Utah Foundation received fewer than 10 responses of problems for the online random-sample survey, results are not reported.

Note: There are a total of 316 random-sample online survey responses and 832 2-1-1 online survey responses.

Source: Utah Foundation.

Financial Needs

Most Utahns with a financial legal issue had problems with a collections agency or with fraud.

Figure 32: Financial Legal Needs, Online Survey Respondents with Financial Issues

	Random sample	2-1-1 sample
Had problems with a collections agency harassing you	31%	29%
Experienced a scam or other type of fraud, such as identity theft	29%	19%
Had someone you owe money to take money from your bank or paycheck	11%	10%
Filed for or needed to file for bankruptcy	10%	11%
Had utilities such as water or electricity shut off	7%	14%
Had serious problem with a payday loan	7%	12%
Had a car taken back by the seller	5%	6%
Total respondents with an issue	193	960

Note: There are a total of 316 random-sample online survey responses and 832 2-1-1 online survey responses.

Source: Utah Foundation.

Of the 900 random-sample survey respondents, 26% experienced a financial problem. It is the issue type with the largest number of people reporting a problem.⁴⁷

Of the more detailed online survey, the greatest percentage of people had problems being harassed by a debt collection agency (31%) or with some type of scam or fraud, such as identity theft (29%).

Well over half of the cases in Utah small claims court are brought by high-cost lenders, and 91% of the arrest warrants issued in small claims court were issued in cases filed by high-interest lenders. As reported by Pro Publica and reprinted in the Salt Lake Tribune, Utah has 417 payday and title loan stores, “more than the number of McDonald’s, 7-Eleven, Burger King and Subway stores combined.”⁴⁸ The average annual interest rate for payday loans in Utah is 652%.

In 2014, Utah passed a law allowing bail money to be turned over to high-interest lenders. As a result, debtors’ only options are to pay money toward their debt or go to jail. An owner of a payday lending company told Pro Publica that using these tactics in small claims court is an integral part of his business model.

Public Assistance

Public assistance generally refers to cash and non-cash benefits to people from governmental entities. The two major kinds of assistance are social welfare programs that are usually provided to lower-income people and social insurance programs that are provided based upon age, or other qualifications. These social welfare programs include public assistance, Supplemental Security Income and the Supplemental Nutrition Assistance Program.

Few Utahns receive public assistance income regardless of poverty status.

Figure 33: Public Assistance Income, by Age and Income (separated by 200% of poverty level), Utah, 2017

	18-24		25-64		65+	
	Under 200%	Over 200%	Under 200%	Over 200%	Under 200%	Over 200%
\$1-\$5,000	0.1%	0.3%	1.6%	0.4%	0.3%	0.1%
\$5,001+	0.0%	0.1%	0.5%	0.0%	0.0%	0.1%
Non-recipients	99.9%	99.6%	98.0%	99.6%	99.7%	99.8%

Source: IPUMS USA, University of Minnesota, www.ipums.org

Few Utahns receive Supplemental Security Income.

Figure 34: Supplemental Security Income by Age and Income (separated by 200% of poverty level), Utah, 2017

	18-24		25-64		65+	
	Under 200%	Over 200%	Under 200%	Over 200%	Under 200%	Over 200%
\$1-\$10,000	0.9%	1.0%	2.8%	0.6%	3.3%	1.5%
\$10,001+	0.0%	0.0%	1.4%	0.4%	0.8%	1.4%
Non-recipients	99.1%	99.0%	95.8%	99.0%	96.0%	97.2%

Source: IPUMS USA, University of Minnesota, www.ipums.org

Public assistance includes the General Assistance program administered by the Department of Workforce Services. The proportion of Utahns receiving any public assistance income is very low – less than 1%. The benefits are typically less than \$5,000 per year. (See Figure 33.)

Supplemental Security Income is a federal program directed toward people with little or no income who are older, blind or have disabilities.⁴⁹ The benefits are typically less than \$10,000 per year. This differs from Social Security Disability Insurance, which can provide payments to people who are under 65 that become disabled after working at least half-time in the previous 10 years; these income data are unavailable by poverty level. (See Figure 34.)

The Supplemental Nutrition Assistance Program, also known as SNAP and colloquially referred to as food stamps, is the most common type of social welfare type program. More than a quarter of Utahns 17 and younger and more than one-in-five Utahns between 25 and 64 receive SNAP benefits. (See Figure 35.)

With regard to public benefits, the survey asked households whether they had lost or been denied governmental benefits such as Social Security, disability income, food, housing assistance or Medicaid in the previous 12 months. Approximately 16% of households had been.

Of the more detailed online random-sample survey, the benefit most often lost or denied was health insurance coverage from Medicaid or the Children's Health Insurance Program (CHIP) – nearly half of households with a public benefit issue.

Since lower-income Utahns are more likely to receive food stamps, they are more likely to have related legal issues.

Figure 35: Lower-income Utahns are much more likely than their higher-income peers to receive food stamps.

	0-17		18-24		25-64		65+	
	Under 200%	Over 200%	Under 200%	Over 200%	Under 200%	Over 200%	Under 200%	Over 200%
	25.4%	3.3%	7.6%	2.4%	21.8%	3.5%	12.3%	3.6%

Source: IPUMS USA, University of Minnesota, www.ipums.org

While Medicaid and CHIP are the most common legal-related issues for random-sample survey households, other governmental assistance tops the list for 2-1-1 respondents.

Figure 36: “Has your Household Lost or Been Denied any of the Following Benefits,” Online Survey Respondents Who Had Been Denied Benefits

	Random sample	2-1-1 sample
Medicaid or CHIP	48%	30%
Income, food, housing or other governmental assistance	37%	47%
Social Security or disability income	15%	23%
Total respondents with an issue	100	466

Note: There are a total of 316 random-sample online survey responses and 832 2-1-1 online survey responses.

Source: Utah Foundation.

Over one-third of households with a public benefits issue had lost or been denied income, food, housing or other governmental assistance.

The picture looks quite different for 2-1-1 survey respondents, where nearly half of those with public benefits issue had lost or been denied income, food, housing or other governmental assistance. (See Figure 36.)

Health Legal Issues

As noted, health care legal needs top the list of needs nationally. In Utah, it seems to be much less of an overall legal need issue. This could be due in part to the fact that Utahns spend less per capita on health care than the people of any other state in the U.S.⁵⁰

Regardless, a far greater proportion of higher-income Utahns have insurance than lower-income Utahns. (See Figure 37.) In fact, the uninsured rate is two to three times higher for lower-income Utahns in each age category.

Less than half of Utahns under 200% of the federal poverty line with insurance receive that insurance from employers, compared to over three-quarters of those over 200% of the federal poverty line.⁵¹

The survey asked whether anyone in the respondents’ households had been overcharged on a medical bill, had trouble keeping your insurance, been turned away and not treated by a doctor or hospital, or a similar health related problem. One-in-five households had.

Respondents under 200% of poverty are less likely to be insured, particularly in the 25 to 64 age group.

Figure 37: Health Insurance Coverage, by Age and Income (separated by 200% of poverty level), Utah, 2017

	0-17		18-24		25-64		65+	
	Under 200%	Over 200%	Under 200%	Over 200%	Under 200%	Over 200%	Under 200%	Over 200%
Insured	87.6%	95.7%	82.0%	90.9%	73.9%	92.1%	98.6%	99.5%
Not insured	12.4%	4.3%	18.0%	9.1%	26.1%	7.9%	1.4%	0.5%

Source: IPUMS USA, University of Minnesota, www.ipums.org.

Of the more detailed online random-sample survey, the top issue was being charged too much for medical services. In addition, about one-fifth of those with an issue indicated that it was related to health insurance company unfairly declining coverage and nearly another fifth said they had trouble keeping governmental insurance, such as Medicaid and CHIP.

Public Service Issues

The survey asked whether anyone in respondents' households experienced "a problem with public services, such as having serious problems accessing or been afraid to call the police, been verbally or physically threatened by police, or needed to have something removed from a criminal record." Approximately 8% had.

Of the more detailed online random-sample survey, the top issues were "slow or insufficient police services" and being "stopped by the police without a good reason, or unfairly arrested."

In addition, many people indicated that they needed to have something removed from a criminal record. When asked whether someone in the household has a juvenile or criminal record, 98 respondents or 11% of the random-sample survey respondents indicated that they did.⁵²

Most respondents with a health-related legal issues indicated that they had been charged too much for medical services.

Figure 38: Health-related Legal Issues, Online Survey Respondents Who Had an Issue

	Random sample	2-1-1 sample
Was charged too much for medical services	50%	39%
Had a health insurance company unfairly decline coverage	22%	17%
Had trouble keeping your insurance from the government	17%	20%
Had trouble keeping your insurance from a private company	6%	9%
Was turned away and not treated by a doctor or hospital	6%	15%
Total respondents with an issue	109	415

Note: There are a total of 316 random-sample online survey responses and 832 2-1-1 online survey responses.

Source: Utah Foundation.

Over half of respondents with public service legal issues indicated that they experienced slow or insufficient police services or that they had been stopped or arrested without a good reason.

Figure 39: Public Service Issues, Online Survey Respondents Who Had an Issue

	Random sample	2-1-1 sample
Slow or insufficient police services	26%	20%
Been stopped by the police without a good reason, or unfairly arrested	25%	22%
Needed to have something removed from a criminal record	22%	23%
Been afraid to call the police after experiencing a crime	15%	22%
Been verbally or physically threatened or treated roughly by police	11%	13%
Total respondents with an issue	72	371

Note: There are a total of 316 random-sample online survey responses and 832 2-1-1 online survey responses.

Source: Utah Foundation.

People under 200% of poverty are much more likely to have been divorced or never married.

Figure 40: Marital Status, by Age and Income (separated by 200% of poverty level), Utah, 2017

	18-24		25-64		65+	
	Under 200%	Over 200%	Under 200%	Over 200%	Under 200%	Over 200%
Married; spouse present	17.5%	18.1%	45.7%	71.7%	38.2%	69.5%
Married; spouse absent	1.4%	0.8%	3.4%	1.6%	2.7%	1.1%
Separated	0.2%	0.1%	4.3%	1.3%	1.2%	0.8%
Divorced	0.8%	0.5%	18.1%	9.2%	19.2%	10.8%
Widowed	0.0%	0.0%	1.8%	1.1%	31.3%	15.1%
Single / never married	80.2%	80.5%	26.6%	15.2%	7.4%	2.6%

Source: IPUMS USA, University of Minnesota, www.ipums.org.

Family Law

Lower-income households are far less likely than their higher-income peers to be married. Much of that difference has to do with the fact that lower-income Utahns are more likely to be divorced – nearly twice as likely. (See Figure 40.)

The survey asked whether anyone in the household experienced a family-related legal issue such as needing a divorce or legal separation, child custody or child support issues, or establishing paternity. Approximately 10% of respondents indicated that they had one of these family law issues.

The most common family-law legal issue is related to problems collecting child support or alimony.

Figure 41: Family Law Issues, Online Survey Respondents Who Had an Issue

	Random sample	2-1-1 sample
Had problems collecting child support or alimony	39%	27%
Had child custody problems	29%	30%
Had or needed a divorce or legal separation	26%	27%
Had difficulties paying child support	7%	13%
Had trouble figuring out who the parent of a child was (establishing paternity)	0%	3%
Total respondents with an issue	70	335

Note: There are a total of 316 random-sample online survey responses and 832 2-1-1 online survey responses.

Source: Utah Foundation.

Of the more detailed online random-sample survey, collecting child support or alimony topped the list. Many households also had problems with child custody or needed a divorce or legal separation. None of the random-sample respondents had paternity issues.

Domestic Violence

The survey asked whether anyone in respondents' households had been physically, sexually or mentally abused by another household member, or had been stalked. This was the lowest of the 19 types of legal needs in the survey, at 4% of households. However, as noted, it had the highest rating for severity of the questions that were asked all respondents.

The rate was higher for online survey respondents. For those responding to the online random-sample survey, over 7% of households reported that someone in the home had been physically, sexually or mentally abused by another household member, or had been stalked.

The rate was even higher (nearly 14%) for the 2-1-1 survey respondents.

Discrimination

The survey looked to see whether people in households were denied services, harassed, abused or unfairly treated because of race, ethnicity, religion, gender, sexual orientation, age or for other characteristics. One-in-10 households saw some type of discrimination.

Of the more detailed online random-sample survey, the most cited discrimination was for credit history (and it was even more significant for the 2-1-1 survey respondents). This is likely related to loan applications and to renters being overlooked by landlords during tight rental markets because of poor credit. Disability, gender, having a criminal or juvenile record, and age each accounted for over 10% of the discrimination reported from the online random-sample survey respondents. (See Figure 42.)

For those online survey respondents who experienced some type of discrimination, it most often occurred in terms of employment. Banking was next, followed by housing. (See Figure 43.)

The most common type of discrimination is related to credit history.

Figure 42: Discrimination Type, Online Survey Respondents Who Had an Issue

	Random sample	2-1-1 sample
Credit history	22%	29%
A disability	14%	16%
Gender	12%	6%
A criminal or juvenile record	12%	12%
Age	11%	8%
Religion	9%	5%
Having young children	8%	6%
Race or ethnicity	6%	10%
Sexual orientation	6%	3%
Spoken or written language	1%	4%
Immigration status	1%	3%
Total respondents with an issue	103	552

Note: There are a total of 316 random-sample online survey responses and 832 2-1-1 online survey responses.

Source: Utah Foundation.

Most often, respondents experienced discrimination related to their employment.

Figure 43: Discrimination Location, Online Random-Sample Survey Respondents

	Percent
Employment	40%
Banking	16%
Housing	14%
Any other business or government office	12%
Health care	10%
Law enforcement	8%

Source: Utah Foundation.

Respondents are much more likely to have difficulty living independently when they are under 200% of poverty.

Figure 44: Independent Living Difficulty, by Age and Income (separated by 200% of poverty level), Utah, 2017

	18-24		25-64		65+	
	Under 200%	Over 200%	Under 200%	Over 200%	Under 200%	Over 200%
No difficulty	97.3%	97.8%	93.0%	97.8%	76.9%	89.7%
Has difficulty	2.7%	2.2%	7.0%	2.2%	23.1%	10.3%

Source: IPUMS USA, University of Minnesota, www.ipums.org.

Disability Rights and Adult Care Issues

The vast majority of Utahns 18 and over have no difficulty living independently. However, for those Utahns under 200% of the federal poverty line, independence is much more of an issue, particularly for those 25 and older. Nearly one-quarter of lower-income people 65 and older have difficulty living independently, compared to only one-in-ten of higher-income Utahns.

Most households with someone experiencing adult care problems reported that they had concerns such as being left alone or being forced to move without wanting to.

Figure 45: Adult Care Issues, Online Survey Respondents

	Random sample	2-1-1 sample
Experienced other problems, such as being left alone, not having anything to do, or being forced to move without wanting to.	*	55%
Been living in a nursing home or other long-term care facility, but they preferred to live elsewhere.	*	17%
Been taken advantage of or abused by a caretaker.	*	16%
Had problems with the care provided by a nursing home or other long-term care facility.	*	12%
Total respondents with an issue		58

* Since Utah Foundation received fewer than 10 responses of problems for the online random-sample survey, results are not reported.

Note: There are a total of 316 random-sample online survey responses and 832 2-1-1 online survey responses.

Source: Utah Foundation.

As with independent living difficulty, those under 200% of poverty are more likely to have cognitive difficulty, ambulatory difficulty, and self-care difficulty.⁵³ For instance, only 2.8% of working-age Utahns over 200% of poverty have cognitive difficulty, compared to 10.2% of Utahns under 200% of poverty, and for ambulatory difficulty it is 3.0% compared to 8.8%

Over one-third (311) of respondents indicated that someone in their household had a disability.

Our random-sample survey question of those 311 households asked whether anyone in the household experienced “any unfair treatment or discrimination related to that disability, such as not been given reasonable access to programs, services, activities or public places.” Of the 311 households that had someone with a disability, 14% reported a disability-related legal issue. That is nearly 5% of all 900 households from the random-sample survey. The rate was higher for the 2-1-1 survey respondents: 11%.

Nearly one-third (276) of respondents indicated that someone in their household was 65 years old or older.

Our random-sample survey question asked whether anyone in the household that had disabilities or that were 65 or older had “trouble with a nursing home or other caretaker.” Of the

Those under 200% of poverty are more likely not to be citizens.

Figure 46: Citizenship Status, by Age and Income (separated by 200% of poverty level), Utah, 2017

	0-17		18-24		25-64		65+	
	Under 200%	Over 200%	Under 200%	Over 200%	Under 200%	Over 200%	Under 200%	Over 200%
Citizen	95.3%	97.6%	88.5%	94.1%	79.8%	88.2%	87.7%	94.0%
Born abroad of American parents	0.2%	0.8%	1.2%	0.8%	0.8%	1.1%	0.0%	0.4%
Naturalized citizen	0.6%	0.4%	1.9%	1.4%	4.9%	4.7%	10.3%	4.3%
Not a citizen	3.9%	1.2%	8.4%	3.6%	14.5%	6.0%	2.0%	1.3%

Source: IPUMS USA, University of Minnesota, www.ipums.org.

276 households that had an older Utah and the 311 households that had someone with a disability, 7% reported a legal issue, or just over 2% of all households.

Our online survey asked more detailed questions related to adult care, as well as for people with disabilities. Since Utah Foundation received fewer than 10 responses of problems for the online random-sample survey, results are not reported. However, for the 2-1-1 survey respondents, the most commonly reported issues had to do with being social isolated, not having anything to do, or being forced to move without wanting to.

Immigration

Only about one-in-ten Utah residents were born outside of the U.S., and only about one-in-20 Utah residents are not U.S. citizens. Lower-income Utahns are more likely than their higher-income peers to be in both groups. In fact, lower-income people are more than twice as likely to not be U.S. citizens.

Under one-in-10 of the survey respondents (75) indicated that someone in their household was born outside of the U.S.

Our random-sample survey question of all those 75 households asked whether anyone in the household faced issues “such as: getting residency, citizenship or work permits; receiving bad legal advice; afraid of calling the police; reporting discrimination or harassment; or applying for benefits because of immigration status.” Approximately 15% of the households had faced such issues, which is only about 1% of all 900 respondents.

Our online survey asked more-detailed questions. (See Figure 47.) By far the most common issue was that people “needed help with becoming a citizen, legally living or working in the U.S., DACA status, or bringing a family member to the U.S.”

Respondents with immigration issues are most likely to need help with obtaining citizenship or legal status.

Figure 47: Immigration Issues, Online Survey Respondents

	Random sample	2-1-1 sample
Needed help with becoming a citizen, legally living or working in the U.S., DACA status, or bringing a family member to the U.S.	63%	63%
Needed to plan for the care of children or family members due to fear of being held or deported by Immigration and Customs Enforcement (ICE).	13%	3%
Had problems related to not having a driver's license.	13%	19%
Were afraid of calling the police, reporting discrimination or harassment, or applying for benefits because of immigration status.	13%	13%
Were detained or deported by immigration.	0%	3%
Received bad information from a notario.*	0%	0%
Total respondents with an issue.	11	32

* Or anyone who represents themselves as being qualified to offer immigration-related legal advice or services, but who have no such qualifications.

Note: There are a total of 316 random-sample online survey responses and 832 2-1-1 online survey responses.

Source: Utah Foundation.

ing a citizen, legally living or working in the U.S., DACA status, or bringing a family member to the U.S.”

There are about 250,000 immigrants in Utah, which equates to roughly one in 12 Utahns. In addition, another one in 12 were born in the U.S., but have at least one parent that is an immigrant. Of these immigrants, about 100,000 are undocumented. An estimated 9,000 of those immigrants are DACA or Deferred Action for Childhood Arrivals recipients.⁵⁴

Education Legal Issues

Lower-income households are less likely than higher-income households to have children present. However, those lower-income households with children are likely to have a greater number of children. For those age 25 through 64, 28% of lower-income households have three or more children present in the household, compared to 18% of higher-income households.

Lower-income households are more likely than their peers to have young children in the household. This can put extra pressure on families to either keep one potential-wage-earner at home or bear the burden of the cost of childcare.

When asked how many children 17 years of age or younger live with them, nearly 50% of respondents said none. The range was zero to “five or more.” The median household had one child.

More than three-in-five survey respondents (550) indicated that someone in their household did attend school, including preschool, kindergarten through 12th grade, community college, college, or university.

Our random-sample survey question of all those 550 households asked whether anyone in the household experienced any “problems related to education, such as getting kicked out of school, or needed but couldn’t get an Individualized Education Program.” Approximately 6% of the 550 households had faced such issues, which is about 4% of all 900 respondents. Just over 6% of the 2-1-1 survey respondents faced such issues.

Native American / American Indian Issues

Native American / American Indian legal issue questions were not asked on the phone survey due to time constraints and the unlikelihood of garnering many results by phone.

Our online random-survey sample of 316 people found that 19 households or about 6% had someone that identified as Native American or American Indian.

Utah families under 200% of poverty tend to have more children present in the household.

Figure 48: Number of Children Present in Household, by Age of Householder and Income (separated by 200% of poverty level), Utah, 2017

	18-24		25-64	
	Under 200%	Over 200%	Under 200%	Over 200%
0	89.6%	93.5%	42.9%	43.3%
1	7.6%	5.4%	12.5%	18.9%
2	1.9%	1.0%	16.2%	19.3%
3	0.6%	0.2%	13.5%	10.2%
4 or 5	0.4%	0.0%	12.4%	7.7%
6 or more	0.0%	0.0%	2.4%	0.6%

Source: IPUMS USA, University of Minnesota, www.ipums.org.

Utah families under 200% of poverty are more likely to have more children under five years of age.

Figure 49: Number of Children Present Under Age Five, by Age of Householder and Income (separated by 200% of poverty level), Utah, 2017

	18-24		25-64	
	Under 200%	Over 200%	Under 200%	Over 200%
0	89.8%	93.7%	72.9%	82.7%
1	7.6%	5.4%	15.9%	11.8%
2	2.1%	0.8%	9.3%	5.0%
3	0.2%	0.1%	1.6%	0.5%
4 or 5	0.2%	0.0%	0.3%	0.0%

Source: IPUMS USA, University of Minnesota, www.ipums.org.

Our random-sample survey question of all those 19 households asked whether anyone in the household experienced any “legal problems related to their tribal membership, such as their tribal affiliation or enrollment, a tribal dispute, living off the reservation, tribal recognition, or use of tribal or trust lands.” Three of the households had faced such issues, as well as five of the 2-1-1 survey respondents (or 8% of the 63 households with someone that identified as Native American or American Indian).

Military Legal Issues

The vast majority of Utahns are not military veterans. And military veterans tend to earn more than 200% of poverty.

Over one-in-five of the survey respondents (189) indicated that someone in their household had served in the military or military reserves.

Our random-sample survey question of those 189 households asked whether anyone in the household experienced any “problems related to that status, such as VA benefits, military discharge status, or problems getting an old job back after military discharge or returning from deployment.” Approximately 8% of the 189 households had faced such issues, which is about 2% of all 900 respondents. Similarly, about 2% of 2-1-1 survey respondents faced such issues.

Other Legal Issues

The survey asked whether anyone in respondents’ households require help with wills, guardianship or powers of attorney. About 7% of random-sample survey respondents said they did, and just under 12% of 2-1-1 survey respondents said they did.

In terms of severity, these legal issues tended to have a small effect on the households of respondents compared to most other issues.

People under 200% of poverty are slightly less likely to be veterans.

Figure 50: Veteran Status, by Age of Householder and Income (separated by 200% of poverty level), Utah, 2017

	18-24		25-64		65+	
	Under 200%	Over 200%	Under 200%	Over 200%	Under 200%	Over 200%
Not a veteran	99.8%	99.6%	96.9%	95.5%	86.0%	82.1%
Veteran	0.2%	0.4%	3.1%	4.5%	14.0%	17.9%

Source: IPUMS USA, University of Minnesota, www.ipums.org.

GETTING HELP

Random-sample survey respondents who got legal help were most likely to get it from a social or human service agency, online, or through a paid attorney.

Figure 51: “Did you get legal help from any of the following?” Random-Sample Survey Respondents

	Percent
A social or human service agency	21%
Online	20%
A paid attorney	19%
A volunteer or unpaid attorney	12%
Anywhere else (specify)	11%
At a courthouse	9%
A legal aid organization, such as Utah Legal Services or Legal Aid Society	8%

Source: Utah Foundation.

When asked if the respondents tried to get help with the problems indicated in the survey, three-in-five (305) said they did, while the remaining did not (202 said no and seven wouldn’t say).

Of the 305 that said they tried to get help, half (157) were successful. (One respondent wouldn’t say.) Of those that did get help, about one-in-five found assistance from a social or human service agency and another one-in-five found help online. Yet another one-in-five hired a paid attorney. (See Figure 51.)

Online random-sample survey respondents who got legal help, by the type of legal need.

Figure 52: “Did you get legal help...?” Online Random-Sample Survey Respondents

	Percent
Other Legal Services	39%
Native American	33%*
Domestic Violence	32%
Family Issues	25%
Disability	20%*
Immigration	20%*
Public Services	16%
Discrimination	13%
Financial Issues	12%
Renter	11%
Employment	8%
Public Benefits	8%
Education	5%
Health Law Issues	2%
Own	0%*
Mobile Home	0%*
Homelessness	0%*
Older Utahns	0%*
Military	0%*

* Fewer than 20 respondents; use with caution.

Source: Utah Foundation.

Random-sample respondents to the online survey got the help they needed at differing levels, depending upon the type of issue. Those with legal needs such as guardianships and wills topped the list. It was also more common for people with domestic violence issues and family-law issues to get help – at about 32% and 25% respectively. However, for those households with financial issues – the most common type of issue for survey respondents – only about one in 12 people got help. (See Figure 52.)

When the 202 respondents who did not get legal help were asked why not, 43% said they didn’t think they needed it. (See Figure 53.)

Lastly, respondents were asked how often the legal system can help them solve the type of problems identified

in the survey. Only 18% responded “most” or “all of the time,” while 23% responded “not at all” or “rarely.” (See Figure 54.)

CONCLUSION

For the quarter of Utahns living at or below 200% of the federal poverty line, legal needs can be a pressing problem. While legal service agencies provide support, analysis of Utah’s civil legal system shows a large unmet need. Indeed, Utah Foundation research shows that gap is an estimated 200,000 legal issues, from financial and employment law to legal health care and public benefits need.

The need is most clear when looking at people who are not represented in civil legal cases. With the 62,000 debt collection cases, almost none of the defendants have representation, and most do not have representation for eviction cases. This is vastly unbalanced when considering that almost all of the petitioners are represented. This provides an uneven playing field in court.

Why are respondents underrepresented? In part because two-thirds of Utah’s lower-income survey respondents indicated that they could not afford a lawyer if they needed one – particularly in the face of \$200 per hour legal fees. The situation is even more dire in rural communities. As a result, most lower-income Utahns try to solve their legal problems on their own. This often takes the form of reaching out online. But many people also reach out to social services agencies and elsewhere, including information and referral services, particularly for landlord/tenant disputes and family law issues.

Of those lower-income households who are successful in procuring representation, half are getting help for their family law and immigration issues. Though well over half of the cases that go to court are for financial issues – and those Utahns do not have legal representation. Financial legal needs topped the list of legal-need types with over one-quarter of households, followed by employment, health law and public benefits. But some needs may be affecting households disproportionately. In fact, while domestic violence was among the least reported legal issue of the 19 types of legal needs, it had the highest rating for severity for victims and their households.

Helping overcome the gap will take more funding for legal aid agencies (either from private or public sources), more social and human service agency support, and more low-cost and pro-bono work by attorneys. While the call to close the legal needs gap has been sounded, there is still a long way to go.

One-fifth of random-sample survey respondents who didn’t get help simply perceived that it was not a big enough problem.

Figure 53: “Why did you NOT try to get outside help?” Random-Sample Survey Respondents

	Percent
It wasn’t a big enough problem / Didn’t need help / Dealt with it myself	43%
Other	17%
I didn’t think that anything could be done about it	12%
Don’t know	12%
I didn’t think I could afford it	6%
I didn’t know who to call	4%
Wouldn’t say	3%
It was too difficult or complicated	3%
I didn’t think it was a legal problem	1%

Note: This figure includes those 161 respondents of the random-sample survey that had problems but didn’t get help.

Source: Utah Foundation.

Many survey respondents do not have faith that the law can help them and their acquaintances with legal problems.

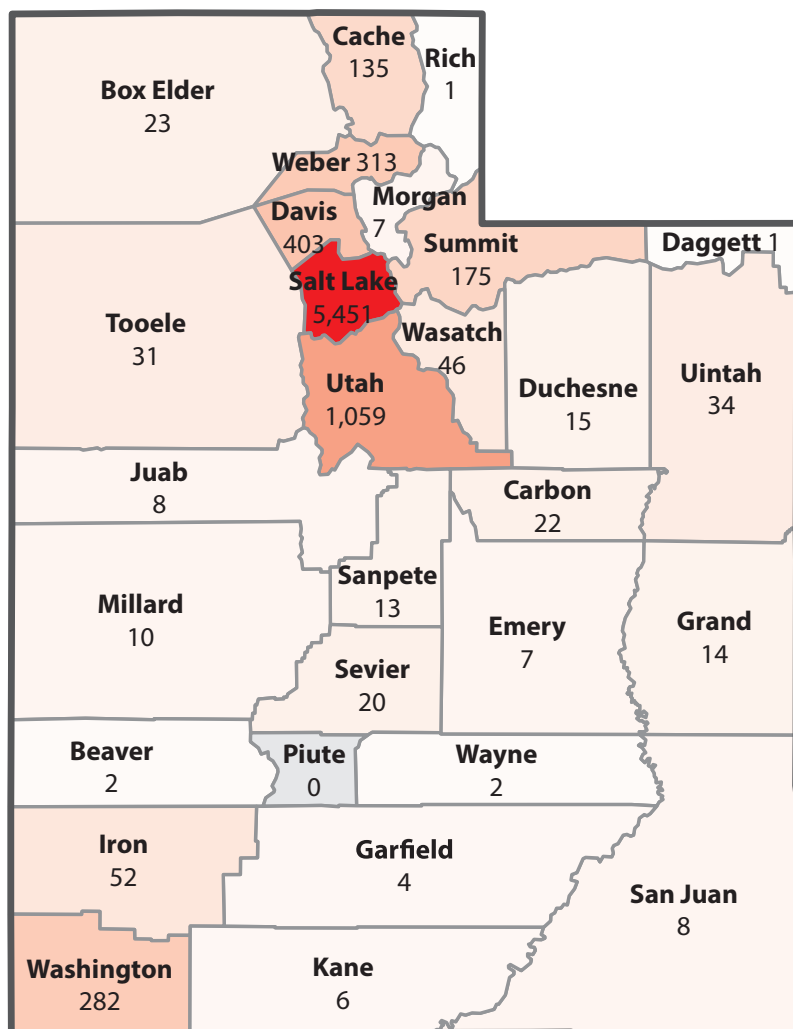
Figure 54: “How often do you think a lawyer, the court, or a mediator can help you and your family, friends, and neighbors solve important problems such as those you identified in this survey?” Random-Sample Survey Respondents

	Number	Percent
Not at all	191	21%
Rarely	194	22%
Some of the time	260	29%
Most of the time	126	14%
All of the time	32	4%
Don’t know	88	10%

Source: Utah Foundation.

APPENDIX A

Figure A: Number of Attorneys in Utah by County, 2017



Source: David McNeill, *Measuring the Legal Services Market in Utah*, *Utah Bar Journal*, Vol. 30, No. 5, Sep/Oct 2017.

APPENDIX B

Figure B-1: List of Partial Random-Sample Survey Responses by Percentage of All Households

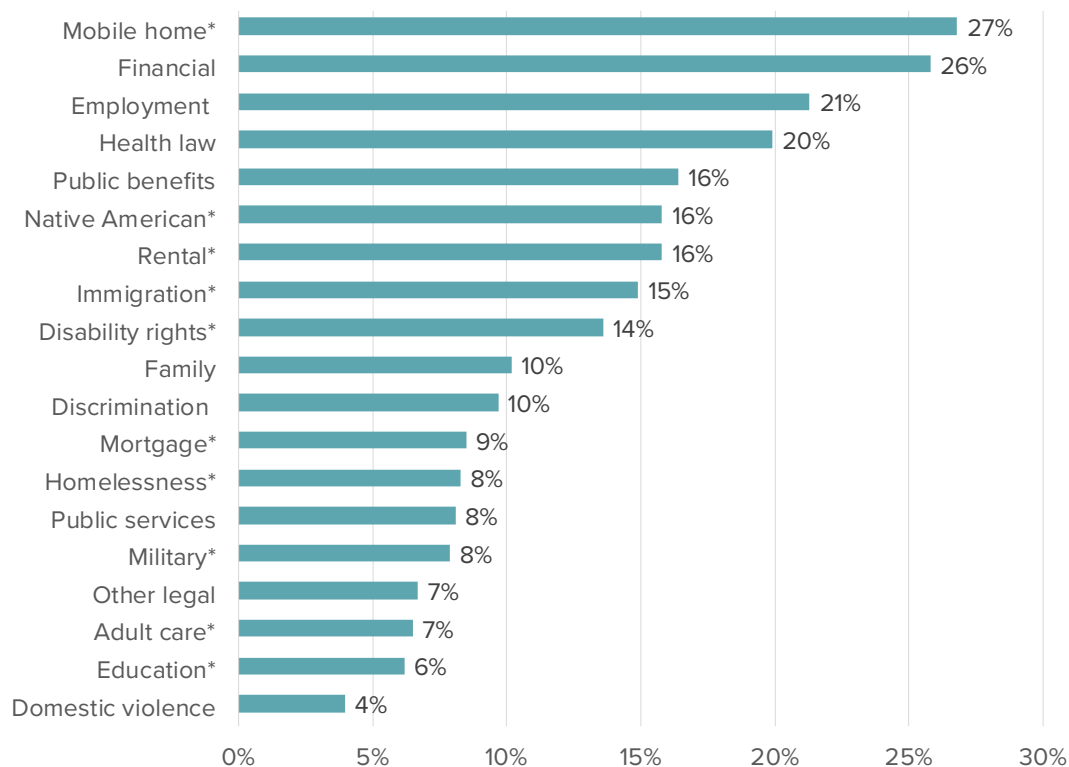
	Number	Percent
Housing		
Mortgage	438	49%
Renter	355	39%
Manufactured home	42	5%
Homeless	36*	11%*
In education	550	61%
Individuals with disabilities	311	35%
65+	276	31%
Military	189	21%
Born outside US	75	8%
Native American	19*	6%*

* Online responses only (316).

Note: These categories are related to the survey legal issues, not a breakdown of the limited household demographics question responses.

Source: Utah Foundation.

Figure B-2: Percent of Respondents' Households with a Specific Need, By Number of Responses in Each of the 19 Issue Types, Random-Sample Survey Respondents



Note: Light bars show questions that are not asked of all respondents; these legal issues are divided by the number of issue respondents.

Source: Utah Foundation.

ENDNOTES

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- 2 U.S. Department of Health and Human Services, Office of the Assistance Secretary for Planning and Evaluation, 2019 Poverty Guidelines, <https://aspe.hhs.gov/2019-poverty-guidelines>.
- 3 U.S. Census Bureau, American Community Survey, 2018, one-year data.
- 4 U.S. Census Bureau, American Community Survey, 2018, one-year data, Selected Housing Characteristics, table DP04. Utah Foundation calculations.
- 5 U.S. Census Bureau, American Community Survey, 2018, one-year data. Utah Foundation calculations, with Utah's population estimated at 3,110,944.
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- 7 John R. Lund, Meeting the Market for Legal Services The Jury is In: Legal Services are a Tough Sell, Volume 31 No. 3 May/June 2018, www.utahbar.org/wp-content/uploads/2018/05/May_June_2018_FINAL.pdf.
- 8 David McNeill, analysis for this report from LicenseLawyer.org data using the Utah State Bar's membership directory data, January 2020.
- 9 Ibid.
- 10 From the Utah Courts, Court Data Request received by David McNeill on January 9, 2020.
- 11 Futures Commission of the Utah State Bar, Report and Recommendations on the Future of Legal Services in Utah, July 29, 2015, www.utahbar.org/wp-content/uploads/2017/11/2015_Futures_Report_revised.pdf.
- 12 Ibid.
- 13 Steven Ruggles, Sarah Flood, Ronald Goeken, Josiah Grover, Erin Meyer, Jose Pacas and Matthew Sobek. IPUMS USA: Version 9.0 [dataset]. Minneapolis, MN: IPUMS, 2019. <https://doi.org/10.18128/D010.V9.0>.
- 14 David McNeill, Measuring the Legal Services Market in Utah, Utah Bar Journal, Volume 30 No. 5 Sep/Oct 2017, http://utahbar.org/wp-content/uploads/2017/09/Sep_Oct_2017_FINAL.pdf#page=22.
- 15 Futures Commission of the Utah State Bar, Report and Recommendations on the Future of Legal Services in Utah, July 29, 2015, www.utahbar.org/wp-content/uploads/2017/11/2015_Futures_Report_revised.pdf.
- 16 David McNeill, Measuring the Legal Services Market in Utah, Utah Bar Journal, Volume 30 No. 5 Sep/Oct 2017, http://utahbar.org/wp-content/uploads/2017/09/Sep_Oct_2017_FINAL.pdf#page=22.
- 17 U.S. Census Bureau, American Community Survey, 2018, one-year data, Poverty Status in the Past 12 Months, Table S1701. Utah Foundation calculations.
- 18 See Utah Courts website; www.utcourts.gov/selfhelp and www.utcourts.gov/ocap/, respectively.
- 19 Futures Commission of the Utah State Bar, Report and Recommendations on the Future of Legal Services in Utah, July 29, 2015, www.utahbar.org/wp-content/uploads/2017/11/2015_Futures_Report_revised.pdf.
- 20 Data collected from Kai Wilson for this report from Utah Legal Services, Legal Aid Society, Disability Law Center, DNA People's Legal Services, Immigrant Legal Services, Moab VMC, Timpanogos Legal Center, Catholic Community Services, Holy Cross Ministries, IRC, and Comunidades Unidas.
- 21 See the Utah Labor Commission webpage, <https://laborcommission.utah.gov/>, whose mission is to "achieve safety in Utah's workplaces and fairness in employment and housing," thereby easing the burden on legal services organizations.
- 22 Utah Legal Services website, www.utahlegalservices.org/.
- 23 Legal Aid Society of Salt Lake website, www.legalaidsocietyofsaltlake.org.
- 24 Disability Law Center website, <http://disabilitylawcenter.org>.
- 25 Timpanogos Legal Center website, <https://timplegal.com/>.
- 26 DNA People's Legal Services website, www.tribaljustice.org.
- 27 Immigrant Legal Services website, <http://www.immigrantlegalservices.org/>.
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- 39 Ibid.
- 40 U.S. Census Bureau, American Community Survey, 2018, one-year data, Occupancy Characteristics, table S2501. Utah Foundation calculations.
- 41 U.S. Census Bureau, American Community Survey, 2018, one-year data, Selected Housing Characteristics, table DP04. Utah Foundation calculations.
- 42 U.S. Census Bureau, American Community Survey, 2018, one-year data, Occupancy Characteristics, table S2501. Utah Foundation calculations.
- 43 Selected monthly owner costs are the sum of payments for mortgages, deeds of trust, contracts to purchase, or similar debts on the property; real estate taxes; fire, hazard, and flood insurance on the property; utilities; fuels; and, where appropriate, the monthly condominium fee for condominiums and mobile home costs.
- 44 U.S. Census Bureau, American Community Survey, 2018, one-year data, Selected Housing Characteristics, table DP04. Utah Foundation calculations.
- 45 Selected monthly owner costs are the sum of payments for mortgages, deeds of trust, contracts to purchase, or similar debts on the property; real estate taxes; fire, hazard, and flood insurance on the property; utilities; fuels; and, where appropriate, the monthly condominium fee for condominiums and mobile home costs.
- 46 Some local governments in the U.S. have started providing legal representation for renters. New York City’s 2017 “right to counsel” law helps low-income renters in the 15 zip codes with the most evictions. Renter representation went from 1% to 56% in one year, and evictions dropped by 27%. Washington D.C. and Philadelphia also provide some renter representation, the latter of which estimates that providing representation can save the city money when taking into account shelter costs and other social services.
- 47 “Such as a scam, identity theft, harassment by a collections agency, bankruptcy, or has someone you owe money to take money from your bank or paycheck.”
- 48 Anjali Tsui, They Loan You Money. Then They Get A Warrant For Your Arrest, December 3, 2019, www.propublica.org/article/they-loan-you-money-then-they-get-a-warrant-for-your-arrest, and Salt Lake Tribune, www.sltrib.com/news/nation-world/2019/12/04/high-interest-loan/.
- 49 While some people over the 200% of poverty level indicate that they receive these benefits, only about 4% of those 25 years and older do.
- 50 Utah Foundation, *Bills of Health: What’s Driving Medical Service Costs in Utah?* December 2017, <http://www.utahfoundation.org/uploads/rr748.pdf>.
- 51 Steven Ruggles, Sarah Flood, Ronald Goeken, Josiah Grover, Erin Meyer, Jose Pacas and Matthew Sobek. IPUMS USA: Version 9.0 [dataset]. Minneapolis, MN: IPUMS, 2019. <https://doi.org/10.18128/D010.V9.0>.
- 52 When Lloyd Pendleton was the director of Utah’s Homeless Task Force, he procured funding for Utah Legal Services to help expunge Utahns’ criminal records. (See: Marjorie Cortez, Program seeks to expunge criminal records of Utah’s chronically homeless, August 2, 2015, www.ksl.com/article/35776056/program-seeks-to-expunge-criminal-records-of-utahs-chronically-homeless.) While the funding was quickly used, Utah Legal Services continues to provide expungement services to anyone who qualifies. In addition, the S.J. Quinney College of Law and Utah Legal Services support an expungement free clinic, and the Salt Lake County Expungement Navigator program provides expungement assistance.
- 53 Steven Ruggles, Sarah Flood, Ronald Goeken, Josiah Grover, Erin Meyer, Jose Pacas and Matthew Sobek. IPUMS USA: Version 9.0 [dataset]. Minneapolis, MN: IPUMS, 2019. <https://doi.org/10.18128/D010.V9.0>.
- 54 American Immigration Council, Immigrants in Utah, 2017, www.americanimmigrationcouncil.org/sites/default/files/research/immigrants_in_utah.pdf.



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THE JUSTICE GAP

ADDRESSING THE UNMET LEGAL NEEDS OF LOWER-INCOME UTAHNS

This report was commissioned
by the Utah Bar Foundation.

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UTAH STATE BAR ACCESS TO JUSTICE COMMISSION
ANNUAL REPORT TO THE UTAH BAR FOUNDATION

May 17, 2020

Prepared by Rob Jepson, Access to Justice Director
Approved by Amy Sorenson and Ret. Justice Christine Durham, Co-chairs

CC: John Baldwin, Richard Dibblee

Dear Utah Bar Foundation Board Members,

In January of 2018, the Board of Bar Commissioners of the Utah State Bar issued the following charge to the Co-Chairs of the then Access to Justice Coordinating Committee¹, identifying the following purposes of the Committee, and listing seven specific objectives:

Purposes of Committee:

To provide leadership for Access to Justice programs and efforts throughout Utah.

To ensure greater communication and collaboration among the various legal service providers to the under-served populations in the state;

To coordinate the Bar's efforts with those of the Utah courts, legal non-profits and community groups and other bar organizations to address judicial, administrative, educational and consumer-oriented issues and improve the overall level of access to justice in Utah; and

To assist in prioritizing needs and resources and work to eliminate barriers faced by low income and disadvantaged individuals in Utah, including those with disabilities, ethnic and racial minorities, rural residents and the elderly.

Specific Objectives:

1. To coordinate the Bar's Access to Justice Programs, which currently include the Modest Means and Pro Bono Programs, the AAA Task Force and the Licensed Lawyer directory site;
2. To work with legal service providers and other related organizations to educate low income and disadvantaged individuals about programs, including through existing law-related channels;
3. To promote the participation of volunteer attorneys in the delivery of legal services to low-income and disadvantaged individuals;
4. To monitor the effectiveness of legal service delivery in the state to low-income and disadvantaged individuals by regularly gathering together with the various legal services providers to: (a) review legal service delivery methods, policies and court rules regarding low-income and disadvantaged individuals; (b) share information, discuss improvements, and review the extent to which this work is being accomplished; (c) identify gaps in access to the legal system; and (d) assess current and future civil legal needs;

¹ Renamed Access to Justice Commission in March, 2019

5. To maintain comprehensive reports of the pro bono and low-bono legal services provided throughout the state by various providers;
6. To organize and sponsor an annual summit of the service providers throughout the state; and
7. To provide input and recommendations concerning awards and recognitions for individuals and organizations providing legal services to low-income and disadvantaged individuals.

SUMMARY OF FISCAL YEAR 2019

In Fiscal Year 2019, the Access to Justice Commission undertook the following projects:

1. Narrowing Our Focus

When the A2J Commission was first formed, its mission was deliberately broad and somewhat flexible, allowing it to adapt and narrow its scope as needed. During its first year of operation, the Commission surveyed Utah's access to justice scene and discovered that many components of a typical access to justice commission were already in place. Namely, the Courts' Committee on Resources for Self-Represented Parties was already addressing inefficiencies and opportunities within the court system, the Utah Bar's Pro Bono Commission was already overseeing pro bono work in the state generally, and a coalition of non-profit organizations were providing direct legal services in many areas.

As a result of this observation, the Commission resolved to narrow its focus and began to seek out a more specific objective. During this time, the Utah Bar Foundation announced its plans to develop a Utah Justice Gap Report that would highlight which areas of law might most benefit from focused attention. The Commission's executive team proposed (among other ideas) using that study as a guide and selecting a single area of law to focus on for the coming year. This concept was proposed to the entire Commission and was approved generally.

In April 2020, the Bar Foundation released the Report, which revealed two areas of urgent need (among others): debt collection issues and eviction issues. The executive team intends to present these findings to the Commission and seek their approval to focus on one of these areas for the coming year. Over the course of the year, the Commission will attempt to study the area from all angles, surveying existing services, specific areas of need, funding needs, publicity needs, and making policy observations. The Commission does not intend to provide direct legal services, provide direct funding, or advocate for specific policy recommendations. Instead, it hopes to act as a convener and surveyor and share its findings with those who are best positioned to engage directly.

2. 2019 Access to Justice Summit

Following the success of the 2018 Access to Justice Summit, the Commission held a second Summit in October 2019. Topics for the Summit included:

- Donations Done Right and Wrong
- Crisis Communication
- Finding the Right Resource for Any Need
- US Census and Federal Funds in Utah

- Working with the Latinx Community
- Legislative Advocacy

Funding for the Summit was provided by the Utah State Bar, the Utah Bar Foundation, and the Lund Family Foundation. From those funds, the Summit awarded three \$1,000 grants to participating non-profits, including the Utah Center for Legal Inclusion, DNA People's Legal Services, and Utah Crime Victims Legal Clinic.

The event drew 87 attendees. This number was slightly lower than the previous year. However, this is likely because the planning committee opted not to advertise the event to the entire Bar, choosing instead to advertise to select groups who would most obviously benefit from the Summit. Next year's planning committee may choose to advertise broadly again in order to reach more people.

3. Launching UtahLegalHelp.org

In response to a common concern that litigants sometimes struggled to find the right legal resource to assist with their needs, the Access to Justice Office created a new website designed to help litigants navigate the various resources at their disposal. This website lists all known clinics throughout the state and utilizes a user-friendly format that makes it easy to find and contact clinics. The website also includes Utah's various non-profit legal service providers.

Following the outbreak of Covid-19, the website adjusted its content to focus on those clinics and non-profits that have remained open during the pandemic. Most recently, it also added a section to highlight resources for litigants facing evictions.

The Access to Justice Office also served the following clients from July 2019 to May 15, 2020.

Program	Clients Served
Modest Means Program - Reduced Rate Representation	393
Pro Se Calendar - Debt Collection (note: no cases in Mar, Apr, or May)	292
Pro Se Calendar – Eviction Defense	207
Tuesday Night Bar (Paused in Mar 2020)	370
Virtual Legal Clinic (Launched in April 2020)	129
COMBINED TOTAL	1391

Note: These totals do not include clients who called into the Bar and we ultimately referred to another program or organization. We estimate that those calls total roughly 600 for the year.

PLANS FOR FISCAL YEAR 2020

In Fiscal Year 2020, the Commission plans to use its new, narrowed focus to closely study and improve the area of law it selects. It will achieve this through the following methods:

- First, it will study one or both of these areas of law to identify problems, brainstorm solutions, and identify which existing players in Utah might be best suited to execute those solutions. The Commission may also reach outside of its membership to parties who are better positioned to execute.
- Second, to the extent appropriate, the Commission will report its findings and recommendations publicly. Though the Commission cannot advocate for specific rule changes (aka lobby), there is no known prohibition on publicizing general flaws in the legal system and inviting other entities to examine them more closely. Because this is an unexplored nuance, the Commission will wade in carefully and collaborate with the Bar.
- Third, the Commission plans to use its “clout” and name recognition to endorse and push through recommendations made by the Court’s Committee on Resources for Self-represented Parties, the Utah State Bar’s Pro Bono Commission, and any other body in need of public support, so long as those recommendations are mission-aligned and the Commission deems them appropriate.

In addition to these efforts, the Commission will continue to oversee the development of UtahLegalHelp.org, plan and execute a third annual Access to Justice Summit (likely focused on its chosen area of law), keep tabs on the Access to Justice Office’s direct legal services, and continue to respond to other needs and opportunities arising from Covid-19 or other unforeseen circumstances.

MEMBERSHIP

Current membership includes the following individuals from some of Utah's most prominent legal agencies, as well as non-legal industry community partners.

Name	Last	Position	Firm/Agency	Email
Justice Christine	Durham	Co-chair	Chief Justice, Utah Supreme Court (Ret.)	jdurham8345@gmail.com
Amy	Sorenson	Co-chair	Partner, Snell & Wilmer	asorenson@swlaw.com
Rob	Jepson	Staff	Utah State Bar - Access to Justice Office	rob.jepson@utahbar.org
Anna	Carpenter	Member	ULaw Clinical Director and Access to Justice Scholar	anna.carpenter@law.utah.edu
Darnell	Crandall	Member	Trial Attorney, Salt Lake Legal Defenders	dcrandall@sllda.com
Kimberli	Haywood	Member	Investment Manager, Community Reinvestment, Ally Bank	kimberli.haywood@ally.com
Scotti	Hill	Member	Associate General Counsel, Utah State Bar	scotti.hill@utahbar.org
Annika	Jones	Member	Associate, Snell & Wilmer	aljones@swlaw.com
Judge Clem	Landau	Member	Salt Lake City Justice Court	clandau@utcourts.gov
Judge Barry	Lawrence	Member	Third District Court	blawrence@utcourts.gov
Jojo	Liu	Member	Director, Criminal Justice Advisory Council at Salt Lake County	jliu@slco.org
Michelle	Love-Day	Member	Associate Director of Educational Equity, Granite School District	mlove-day@granitesd.org
John	Lund	Member	Shareholder, Parsons Behle & Latimer	jlund@parsonsbehle.com
David	McNeil	Member	Data Consultant	biodavid@gmail.com
Kim	Paulding	Member	Executive Director, Utah Bar Foundation	kpaulding@utahbarfoundation.org
Nubia	Peña	Member	Director, Office of Multicultural Affairs	nubia@ucasa.org
Nathanael	Player	Member	Director, Utah Courts Self-Help Center	nathanaelp@utcourts.gov
Nancy	Sylvester	Member	Associate General Counsel, Utah State Courts	nancyjs@utcourts.gov
Heather	Thuet	Member	Shareholder, Christensen & Jensen	heather.thuet@chrisjen.com
Chiara	Cameron	Summit Planning Member	Former Director, United Way of Utah, 2-1-1	chiara.thacker.cameron@gmail.com

Stephanie	Large	Summit Planning Member	Attorney, Utah Legal Services	slarge@utahlegalservices.org
Matt	Page	Summit Planning Member	Communications Director, Utah State Bar	matthew.page@utahbar.org
JoLynn	Spruance	Summit Planning Member	Outgoing Director, University of Utah Pro Bono Initiative	
Jeff	Daybell	Support Staff	Utah State Bar - Access to Justice Office	jeff.daybell@utahbar.org
Mackenzie	Hirai	Support Staff	Utah State Bar - Access to Justice Office	mackenzie.hirai@utahbar.org

STAFFING CHANGES

The Access to Justice Office has undergone three staffing changes in the past year and anticipates either one or two more potential changes.

- In July 2019, Nick Stiles left his role as Director and Rob Jepson assumed his role.
- In September 2019, Scotti Hill was hired as a Staff Attorney.
- In December 2019, Scotti was hired as Associate General Counsel within the Bar and Jeff Daybell was hired to take her place as a Staff Attorney.

In the coming two months, our current Coordinator, Mackenzie Hirai, may accept an offer to go to law school. We are waiting for final notice from Mackenzie.

Jeff Daybell, the current Staff Attorney, may also ultimately leave the Office in order to pursue managing a new non-profit organization full time. As of this writing, Jeff does not have immediate plans to leave and his departure will be contingent upon the IRS approving his non-profit application and securing funding from donors. In the event that Jeff leaves, our office will continue to work closely with his new non-profit and will promptly fill his role with another attorney.

John Baldwin, executive director for the Utah State Bar, has provided written confirmation of the Bar's commitment to continue matching funding for the coming year.

POSITIVE STORY

From Staff Attorney Jeff Daybell:

"A few weeks ago, I represented Mr. Jim Davis. He was being evicted for non-payment of rent. In speaking with Mr. Davis, it became evident that he was likely being wrongfully evicted given the Governor's Moratorium. The negotiation with opposing counsel came to a standstill, so I encouraged Mr. Davis to let us go forward with an occupancy hearing.

During the occupancy hearing opposing counsel made the argument that he wouldn't qualify for protection because he couldn't prove he had been impacted by the coronavirus. After the landlord testified, I was able to cross-examine him and asked what type of loan he used to purchase the property. Turns out he had used an FHA loan and therefore the rental property was covered under the CARES Act. The court granted my oral motion to strike the hearing given the evidence of qualification and the case was postponed to the end of the CARES Act period (August).

The very next morning Mr. Davis was served with a nuisance eviction with very slim accusations including leaving the porch light on, loud discussions at 3:00 p.m., and other absurd claims. I made one call to the attorney's office and the eviction went away. I feel like this was a great outcome for Mr. Davis, and one that he likely could not have achieved on his own."

SUMMARY

In summary, the Access to Justice Commission will continue to narrow its focus, build meaningful relationships, and shine the spotlight on many of the existing access to justice efforts being undertaken throughout the state.

We thank the Utah Bar Foundation Board for their ongoing support and confidence in our work. If there are additional questions we can answer as an executive team, we welcome any requests or further correspondence.

Sincerely,

Justice Christine Durham (ret.)

Amy Sorenson

Rob Jepson