

VISION OF THE UTAH STATE BAR

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

MISSION OF THE UTAH STATE BAR

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

UTAH STATE BAR STATEMENT ON DIVERSITY AND INCLUSION

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

The Bar shall strive to:

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

Utah State Bar Commission Policies and Procedures

Page 40

(g) Diversity Requirements.

Providers of continuing education programs sponsored or co-sponsored by the Bar are asked to ensure that program presenters reasonably reflect the diversity of firms, geography and gender within the Bar membership. CLE program proposals may not inappropriately promote individual law firms. If the CLE Administrator is of the opinion that a program violates this prohibition, the matter shall be referred to the Executive Director for decision and any appropriate recommendation to the program provider.

BAR AWARDS

<u>AWARD</u>	<u>DUE</u>	<u>CHOSEN</u>	<u>PRESENTED</u>
1. Dorathy Merrill Brothers Award Advancement of Women in the Law	Mid-January	January	Spring Convention
2. Ray Uno Award Advancement of Minorities in the Law	Mid-January	January	Spring Convention
3. Judge of the Year	Mid-April	June	Annual Convention
4. Distinguished Lawyer of the Year	Mid-April	June	Annual Convention
5. Distinguished Section of the Year	Mid-April	June	Annual Convention
6. Distinguished Committee of the Year	Mid-April	June	Annual Convention
7. Outstanding Pro Bono Service (Selected by the Pro Bono Commission)	Mid-March	September	Fall Forum
8. Distinguished Community Member	Mid-September	September	Fall Forum
9. Pro Bono Lawyer of the Year	Mid-September	September	Fall Forum
10. Professionalism Award	Mid-September	September	Fall Forum
11. Outstanding Mentor Award	Mid-September	September	Fall Forum
12. Heart and Hands Award	Mid-September	November	Utah Philanthropy Day
13. Distinguished Service Award			As Needed
14. Special Service Award			As Needed

(Distinguished Young Lawyer of the Year)
Law Day

(ABOTA)
Fall Forum

Points From Charlotte Miller's Bar Commission Leadership Workshop (August 23, 2014)

1. Remember why you joined the Commission – what are your goals?
2. Remember your goals are probably the same and/or similar to your colleagues on the Commission, even if you think you come from a different perspective than everybody else.
3. Being on the Commission is a privilege not a chore. Develop a mindset of “I *get* to do X” instead of “I *have* to do X.”
4. Attend all Commissions meetings; study the materials beforehand. Focus 100% of your attention while there. Do not text, or do other work during Commission meetings. Be engaged. Listen carefully. Offer thoughtful comments that are in the best interest of the Bar. Follow through. Make a difference.
5. Your time on the Commission is short, especially ex-officio members. Make the most of it.
6. Remember your role: Bar staff can handle the day –to-day operations of the Bar. Your job is big picture and oversight.
7. Charlotte encouraged the Commissioners to think about what consensus means to each of them and how they should not try to undermine a decision after it is made.
8. If you do not like someone you have to work with, use strategies to get to know the person that will enable you to better work with the person or even begin to like her or him. Charlotte gave an example of making a point to speak every day with a co-worker she thought was difficult.
9. Encourage and mentor others along in Bar leadership. Remember your Bar story, which probably included an invitation from a Bar leader to help.
10. Talk often about the Bar's Vision and Mission statement, to focus your work in a way that is consistent with those statements.
11. Charlotte conducted exercises that encouraged Commissioners to think about the decision making process. Groups were given scenarios with different difficult decisions to make and asked to reach decisions while considering the following factors:
 - a. What facts do they need? Data is very important to good decision making
 - b. What should the process be?
 - c. What unwritten Bar traditions impact the final decision?
 - d. How does the culture of the Bar impact the decision?
 - e. What items in Bar governance materials are relevant to the process?

Two most important responsibilities of a Bar Commissioner

Represent the interests of the attorneys we represent; voice for division

Bar activities and initiatives be consistent with the Bar's purpose and mission.

Help fulfill vision by devoting time and intellect

Contribute ideas and work

Serve lawyers of Utah

Help accomplish goals of the commission

Represent my division and my liaison groups

Make the Bar meaningful to lawyers

Speak honestly

Contribute with ideas and feedback

Fiduciary

Forward thinking visionary

Communicate with Bar members

Have programs that assist all attorneys and advance the profession

Protect core functions

Promote access to justice and diversity

Know concerns of membership

Speak for membership

Take action on members' needs

Be conservative with bar dues

Attend the meetings

Use sound judgment

Serve community

Represent the unrepresented

Access to Justice

Work together to assist sections of the Bar

Support Rule of Law and integrity of legal system

Listen and participate

Utah State Bar Commission
Friday, May 12, 2017
Logan Golf and Country Club
Logan, Utah

Agenda

1. 9:00 a.m. President's Report: Rob Rice

- | | | |
|-----------------|-----|--|
| <i>10 Mins.</i> | 1.1 | Futures Commission Report (Tab 1, Page 8) |
| <i>10 Mins.</i> | 1.2 | Report on Meetings with Congressional Delegations |
| <i>10 Mins.</i> | 1.3 | Report on Practice Portal |
| <i>10 Mins.</i> | 1.4 | Report of Website Redesign |
| <i>10 Mins.</i> | 1.5 | Report on 2017 Summer Convention |

2. 9:50 a.m. Action Items

- | | | |
|-----------------|-----|---|
| <i>30 Mins.</i> | 2.1 | Approve 2017-2018 Budget: (Tab 2, Page 17) |
| <i>15 Mins.</i> | 2.2 | Limited Practice Admissions Rule (Tab 3, Page 83) |
| <i>10 Mins.</i> | 2.3 | Select Lawyer of the Year Award Recipient (Tab 4, Page 87) |
| <i>10 Mins.</i> | 2.4 | Select Judge of the Year Award Recipient (Tab 5, Page 137) |
| <i>10 Mins.</i> | 2.5 | Select Committee of the Year Award Recipient (Tab 6, Page 146) |
| <i>10 Mins.</i> | 2.6 | Select Section of the Year Award Recipient (Tab 7, Page 149) |
| <i>10 Mins.</i> | 2.7 | Approve Location of 2019 Convention in Park City (Tab 8, Page 151) |
| <i>10 Mins.</i> | 2.8 | Nomination for Replacement of John Lund as Commission Rep. on Utah Judicial Council |

3. 11:35 a.m. Information Item

- | | | |
|----------------|-----|--|
| <i>10 Mins</i> | 3.1 | Convention Review Committee Report: Dickson Burton (Tab 9, Page 159) |
| | | <div style="display: flex; justify-content: space-around; font-size: small;"> <i>Appendix 1</i> <i>Appendix 3</i> <i>Appendix 5</i> <i>Appendix 7</i> </div> <div style="display: flex; justify-content: space-around; font-size: small;"> <i>Appendix 2</i> <i>Appendix 4</i> <i>Appendix 6</i> </div> |

4. 11:45 p.m. Executive Session

12:00 N. Adjourn to Lunch with Cache County Bar

Consent Agenda (Tab 10, Page 293)

1. Approve April 14, 2017 Commission Meeting Minutes

Attachment (Tab 11, Page 297)

1. April 2017 Financials
2. *Salt Lake Tribune*. Op-ed: Don't Undermine the Independence of Utah's Judges. by Robert O. Rice

(Over)

Calendar

July 18	Executive Committee	12:00 Noon	Utah State Bar
July 26	Commission Meeting	1:00 p.m.	Sun Valley, Idaho
July 26-29	Summer Convention		Sun Valley, Idaho
August 25-26	Commission Meeting and Retreat	12:00 Noon	Hyatt Centric, Park City

TAB
1



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Kristin K. Woods
Barney McKenna & Olmstead
St. George

Name _____
Firm _____
Address _____
City, State, Zip _____

May 14, 2017

Dear _____,

I am writing on behalf of the Utah State Bar to report to you on our progress in implementing the recommendations of the July 29, 2015 Final Report of the Bar's Futures Commission. The report concluded that quality affordable legal services for all could be assured only by a "transformational change in the legal profession" and it outlined how that change could begin. It then charged the Utah State Bar to implement those recommendations. Your efforts were instrumental in developing the work of the Commission and in determining the nature and scope of the recommendations and we acknowledge your stake in the actions taken.

This has been an important priority for us. We are grateful for our partnerships with the BYU Law School, the S.J. Quinney School of Law at the University of Utah, the Utah Supreme Court, the Utah Administrative Office of the Courts, the Utah Legislature, and various state agencies. I am pleased to say that most of the Commission's recommendations have now been accomplished and we have made substantial progress on the balance.

Our most important action was to create a new Affordable Attorneys for All (AAA) Task Force to take the lead in implementing the recommendations. That task force was made up of a broad spectrum of lawyers, judges and court administrators. Their efforts have been critical in moving this work forward and the group continues to drive these priorities along.

We also prioritized the development of an interactive online lawyer referral directory called *Licensed Lawyer* which lists lawyers who are willing to take clients by their geography, practice areas, billing preferences and language ability. It is presented in a search format that is easy to read and simple to navigate. It is found at www.LicensedLawyer.org.

Our Progress Report is attached. I have also included a copy of the Commission's report to refresh your memory on this great task. Please let me know if you want to discuss our efforts and the progress made so far. Thank you again for your devotion in helping us begin our work.

Sincerely,

Robert O. Rice
President

Progress Report on Implementation of the Recommendations of Utah State Bar's Futures Commission

May 14, 2017

Section 1. Make Lawyers More Available and Much More Accessible

Recommendation 1A. The Bar should develop and maintain a robust online lawyer referral directory that is easily available to the public.

Action. The Bar and the AAA Task Force have developed and are aggressively marketing a fully-functioning online directory called *Licensed Lawyer* which lists lawyers who are willing to take clients by their geography, practice areas, billing preferences and language ability. It is presented in a search format that is easy to read and simple to navigate. It is found at www.LicensedLawyer.org.

Recommendation 1B. The Bar should build and promote a consumer-focused website which, building on the online directory of lawyers, will become the key clearinghouse for clients in need of legal assistance.

Action. The Bar has engaged an outside web designer that is now working with our new Innovation and Technology Committee in creating an entirely different design for a web site with an uncluttered, more consumer-friendly, format highlighted by cleaner graphics and fewer clicks. It will highlight the *LicensedLawyer* membership directory and a new member-focused "Practice Portal" web site and will lead the public and members more swiftly and directly to the content they want. The Bar's new website will soon replace our current site at www.utahbar.org. We will continue to develop the site to improve access for the public and promote the availability of affordable legal help.

Recommendation 1C. The Bar should increase the use of discrete task representation and fixed fee pricing by: marketing the availability of "unbundling," educating lawyers and courts on best practices for implementing these approaches, and establishing an "unbundled" section for the Bar with lawyers who are willing to help clients on a fee-per-task, limited scope basis.

Action. The Bar created a Limited Scope Section with interested lawyers who are excited about promoting the value and effectiveness of discrete task representation to more readily help clients on specific, identifiable, legal tasks. They are vigorously working to educate lawyers on the efficiencies of performing fixed fee-per-task services and marketing the availability of these helpful legal services to the public and the courts. We have found that this is increasing in usage as it becomes more prominent and is finding greater acceptance in the profession and the courts.

Recommendation 1D. The Bar should promote fee-per-task (unbundled service) delivery models in locations where lawyers can meet with clients for advice in public access points like courthouses, public libraries, and community centers. The Bar should address, internally and with the courts, adjustments to the rules of practice, administration, and professional responsibility to facilitate such models.

Action. The AAA Task Force developed a pilot program entitled “Courthouse Steps” where lawyers were available to meet with clients at both the Utah State Bar and at the Matheson Courthouse for immediate assistance at reduced rates. Lawyers were available on-site to assist potential clients who needed immediate help and we set up schedules where clients could make appointments to drop in and get quick assistance as needed. However, the program never successfully matched enough lawyers with clients and was put in hiatus pending further study.

Recommendation 1E. The Bar should better promote, with both lawyers and those needing lawyers, the numerous *pro bono* and modest means offerings and programs already in place throughout Utah. It should strengthen and expand the Bar’s Modest Means Lawyer Referral Program, the statewide program already in place to serve middle class clientele.

Action. The AAA Task Force has been working with the Bar’s Communications Director, the Bar’s *Pro Bono* Commission and the Bar’s Modest Means Committee to more aggressively market the Bar’s Access to Justice programs through social and print media, information at courthouses, meetings with judges and presentations to local civic groups. We are focusing attention to our *LicensedLawyer* website where access is quickly available to these services for appropriate low-income clients.

Recommendation 1F. The Bar should investigate and promote providing incubators or other support for new lawyers who wish to establish practices, especially in the rural areas of Utah, to provide basic legal services to underserved clients. This should include seeking grants and other private funding, as well as exploring federal and state funding, for the specific purpose of helping lawyers establish viable practices.

Action. The University of Utah law school provided funding to pay two new lawyers to establish practices by working for the non-profit law firm, Open Legal Services. Open Legal Services actively solicited new graduates, but were unable to find any who were interested in starting on their own due to improving economic conditions in the state. The AAA Task Force will continue to encourage the creation of incubators and to work with the law schools to evaluate the success of this type of funded placement for new lawyers. They are also committed to work with the Utah Legislature to find funding and find local lawyers in rural areas who are willing to mentor new lawyers and introduce them to remote practice.

Recommendation 1G. The Bar should investigate and promote changes to licensing requirements to reflect the economic realities of multistate practices and to accommodate lawyers who live in Utah but do legal work for clients outside of Utah.

Action. The Bar is petitioning the Utah Supreme Court to modify its Admissions Rules and permit lawyers to practice in the state for one year pending approval of their Bar application. This rule change will allow greater mobility for lawyers who wish to practice law in Utah for in-state and out-of-state clients as they work to become licensed.

Recommendation 1H. The Bar should investigate and consider the impact of changes to Rule 5.4 of the Rules of Professional Conduct to allow non-lawyers to share fees and partner with lawyers in order to increase innovation and encourage lawyers to be more client focused.

Action. The Bar has actively supported the Supreme Court's Limited Paralegal Practitioner licensing steering committee, which has approved rules to allow non-lawyer legal practitioners to share fees with lawyers. The Bar has also appointed a committee to review the benefits and ethical concerns of permitting others to share fees. This is a significant departure from traditional rules of professional conduct across the country and continues to be a point of study and evaluation.

Section 2. Better Educate and Train Lawyers and Law Students about Their Business

Recommendation 2A. The Bar and the two law schools in the state should provide more business and entrepreneurial training.

Action. Bar leaders are working with the law schools in their development of practice management classes. The Bar has also found success through the work of the Innovation and Technology Committee in providing regular continuing legal education classes which focus on business models and trends in practice technology. *Apple* is now providing a series of continuing legal education seminars to train on incorporating new technology and developing entrepreneurial skills. The Bar leaders and the committee are working to develop the on-line "*Practice Portal*," mentioned above, to provide a one-stop site for access to a wide range of practice, business and legal aids.

Recommendation 2B. The "Third-Year Practice" Rule (which enables students in their third year of law school to engage in a very limited practice of law in specific circumstances under the supervision of a lawyer) should be expanded and enhanced. This is to permit more law students to provide limited advice and counsel in specific and innovative ways like issue spotting at legal clinics or courthouse consultations.

Action. The "Third-Year Practice" Rule has been expanded by the Utah Supreme Court to permit a greater variety of services by students in both their second and third years of school.

Section 3. Keep Improving Judicial Case Management

Recommendation 3A. The Bar Commission should endorse and promote increased judicial case management oversight of dockets, especially in family law and debt collection cases.

Action. The Utah Administrative Office of the Courts has created a Standing Committee on Children and Family Law, which is reviewing ways to improve case management. The Bar Commission has a representative on the committee who is committed to improving case management. The Bar is encouraged by the committee's efforts.

Recommendation 3B. The Bar Commission should endorse and promote simplification of court processes and redesign of court rules and procedures to better enable attorneys and clients to use limited scope representation. The bulk of the need is in family, housing, and debt collection matters so that is where such efforts should focus.

Action. The Bar Commission has charged the new Limited Scope Section with the task of working with the Administrative Office of the Courts on developing the rules and procedures necessary to incorporate greater access to limited scope representation by lawyers. The section is actively working to accomplish those charges.

Recommendation 3C. There should be legislation to increase the jurisdictional limit for Small Claims Court and promote additional resources and volunteers to provide mediation services.

Action. The Small Claims Court jurisdictional limit was increased to \$11,000 from \$10,000 in the 2017 legislative session. The Bar and its lobbyists, along with the AAA Task Force, supported Senator Todd Weiler in his efforts. We will continue to work with him and other interested legislators on encouraging access to alternative dispute resolution.

Recommendation 3D. The Bar Commission should support the Supreme Court's Task Force on limited legal licensed technicians to facilitate the provision of affordable legal services to the people of Utah.

Action. The Supreme Court's Task Force recommended the creation of Licensed Paralegal Practitioners to perform limited legal services in family law, landlord-tenant and collection areas of the law. The Bar Commission has several representatives on the steering committee and is actively involved in creating the rules and developing the processes to administer this new limited practice.

Section 4. Take Control of Technology

Recommendation 4A. The Bar should promote and maintain online CLE sessions on the business of practicing of law, best uses of technology, unbundling legal services, effectively promoting services to prospective middle class and small business clients, and managing a virtual law practice.

Action. The Bar has charged the Innovation and Technology Committee and the Limited Scope Section with developing more on-line education. They are actively working on those goals.

Recommendation 4B. The Bar should encourage lawyers to participate in established *pro bono* efforts that utilize remote services delivery systems to help clients in geographically isolated areas.

Action. The Bar and the AAA Task Force are working to increase information about the need and ease of remote representation and are working with rural court administrators and rural judges to educate them on the value and simple ways in which *pro bono* representation may be incorporated through video access in remote areas and to encourage them to permit web-based remote video appearances, particularly in *pro bono* matters. Current court rules permit this type of on-line remote representation and greater use will be possible as judges become more comfortable with conditions and the technology.

Recommendation 4C. The Bar should work to make all of its CLE offerings available for remote attendance and participation.

Action. The Bar is now web-casting regular interactive CLE seminars from central locations to courthouses throughout the state for live CLE credit. We are not able to make all of our CLE seminars available for remote attendance and participation because of limitations on technology and CLE rules which require in-person attendance for at least one-half of the CLE hours required by the Utah Supreme Court.

Recommendation 4D. The Bar should promote Utah's "one-stop" shop for small business registration; link to and promote this website on its own website; partner with the Utah Division of Corporations to determine other ways to promote the use of this website and whether there are additional services to promote; and study ways to refer the site's users to potential lawyers if they need additional assistance.

Action. Bar staff has worked with the Utah Division of Corporations to simplify and highlight the link to the Bar's website and access to lawyers. The Bar supported legislation which will enhance the Division's efforts to develop their one-stop web site and will continue to partner with the Division in sharing information and highlighting the availability of legal help.

Recommendation 4E. Clarify who with the Bar, among both staff and lawyers, has the charge of leading and training Utah lawyers in the area of law practice technologies.

Action. The Bar has accepted the responsibility of taking the lead by forming the Innovation and Technology Committee and appointing imaginative, interested, technologically progressive lawyers in creating regular continuing education seminars which introduce developments in technology and practice management. And, as previously noted, the development of the new "Practice Portal" website will provide a foundation for training lawyers and providing them with more creative tools to help them in their practices.

Section 5. Support Reestablishment of the Court's Access to Justice Commission

Recommendation 5. For a time, the Utah Supreme Court led an impressive and active stakeholders' roundtable organization and could again engage in that effort, as many state supreme courts choose to do.

Action. The Bar has formed an Access to Justice Council which consists of thirty-seven different access to justice stakeholders in the state. The Council met in the fall of 2016 in a roundtable setting to re-invigorate efforts, increase communications, reduce duplication of services and combine resources. We anticipate the group will meet regularly and provide the leadership needed to better address the needs of our citizens. Currently, the Bar and the Courts are also successfully operating a number of different innovative access to justice programs.

For the time being, the Bar believes that the work of an Access to Justice Commission is being performed by the Access to Justice Council and that the Council as now organized is well suited to coordinate Utah's many access to justice programs.

TAB
2



UTAH STATE BAR DRAFT BUDGET FY 2017/18

May 8, 2017

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Utah State Bar FY18 Budget Narrative

Overview

The Utah State Bar's operations consist of 23 unique departments. Many of the Bar's departments are regulatory in nature and contain little discretionary income and expenses (Licensing, Admissions, NLTP, and OPC). Some departments are intended to support themselves (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 (Facilities and Bar Journal). The Fund for Client Protection and the 36 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
Admissions	Admissions	Regulatory	Self-supporting
New Lawyer Training Program ("NLTP")	NLTP	Regulatory	Self-supporting
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 23 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 FY18 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, Admissions, CLE and Section Support have all been budgeted to break even (plus or minus \$20,000). Regulatory departments' income and expenses are driven primarily by the key changes highlighted below.

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 2-3% increase in licensing revenue each year and utilizing existing staff to absorb much of the additional workload. Each of the last eight fiscal years has generated a net profit which has added to the Bar's reserves. However, it is anticipated based on historical trends that expense growth will outpace revenue growth around 2021 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 FY18 draft budget are the following key changes compared to FY17:

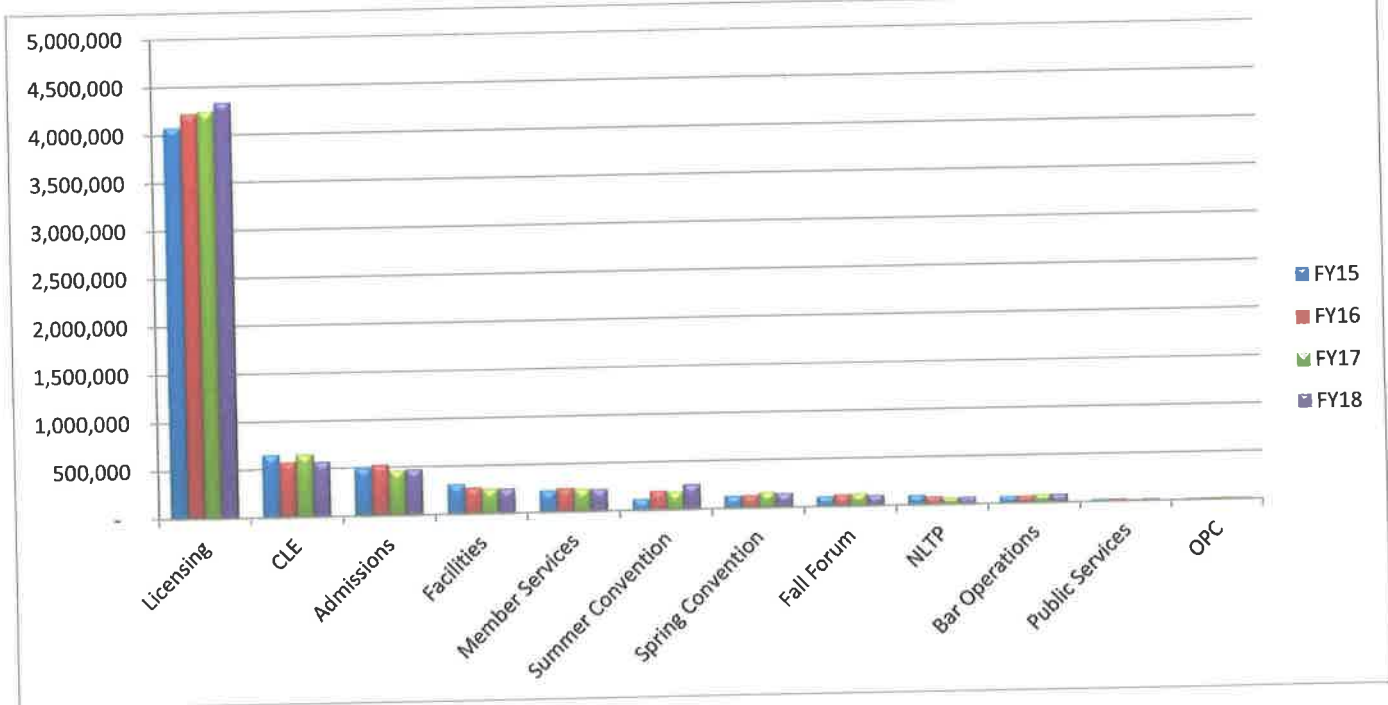
	Anticipated % Change vs. FY2017	Anticipated \$ Change vs. FY2017
Licensing revenue (except late fees)	+2.5%	\$104,000
Admissions revenue (except late fees)	+2.0%	\$8,000
Salaries (including Wipfli suggested adjustments)	+6.0%	\$167,000
Health insurance	+10.0%	\$12,000
Dental insurance	+3.0%	\$1,000
Building expenses (utilities, etc.)	+5.0%	\$12,000
Insurance expenses (liability, D&O, etc.)	+5.0%	\$4,000

Summary of Changes from First Draft of Budget:

- Added March and April 2017 actual results which refined the FY17 projections, thereby impacting the FY18 budgeted numbers (overall net difference is negligible).
- Added \$50,000 to FY18 salary budget for Wipfli proposed changes.
- Removed FY18 cash contribution to UDR of \$10,000.
- Added \$4,000 to YLD budget to match their request of \$56,000 for FY18.

**Utah State Bar
FY18 Draft Budget
Revenue by Department**

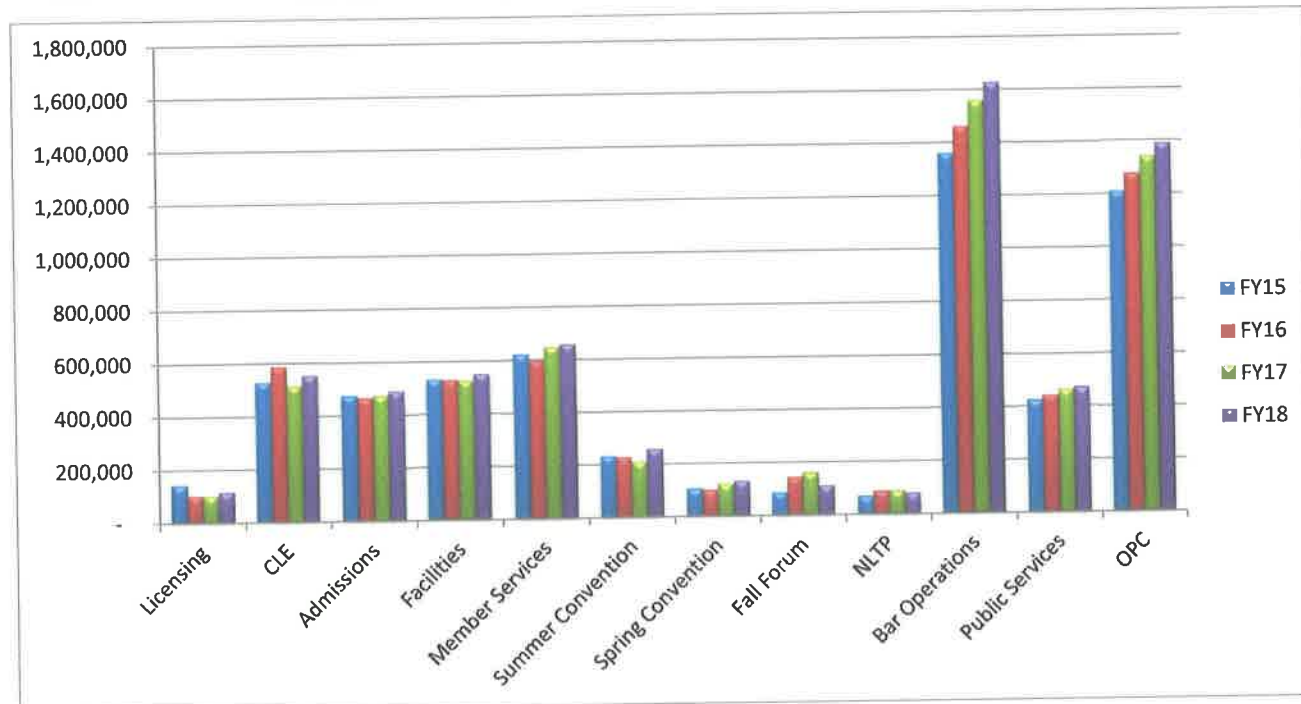
Revenue	Actual FY15	Actual FY16	Projected FY17	Budget FY18	% of Total	Trend
Licensing	4,076,078	4,217,626	4,240,559	4,331,400	65.2%	
CLE	648,062	570,370	644,823	570,000	9.9%	
Admissions	492,362	521,860	464,850	473,405	7.1%	
Facilities	312,896	274,410	257,979	257,979	4.0%	
Member Services	221,925	240,595	230,703	226,797	3.5%	
Summer Convention	114,948	198,446	189,012	257,000	2.9%	
Spring Convention	123,943	132,270	164,213	147,200	2.5%	
Fall Forum	100,139	120,992	129,261	111,000	2.0%	
NLTP	102,363	79,029	68,571	72,434	1.1%	
Bar Operations	68,729	70,279	85,259	85,569	1.3%	
Public Services	20,674	22,656	15,534	17,336	0.2%	
OPC	12,682	14,866	16,209	12,000	0.2%	
Total	6,294,800	6,463,398	6,506,973	6,562,121	100.0%	



This table and chart shows the Bar's trended revenue by financial statement category. More than 65% 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 82% of the Bar's income. We are projecting a 2.5% increase in licensing fees in FY18 compared to FY17 which equates to approximately \$100,000 in additional licensing fees. This projected increase is based historical trends over the last several years which have averaged 3% growth annually. CLE revenue is expected to be closer to FY2016 levels as fewer members must comply with MCLE in even years and therefore fewer CLE events are held in even years. Because we have seen a slowdown in Admissions revenue due to lower student and attorney exam fees, we are projecting just a slight increase in Admissions revenue in FY18.

**Utah State Bar
FY18 Draft Budget
Expenses by Department**

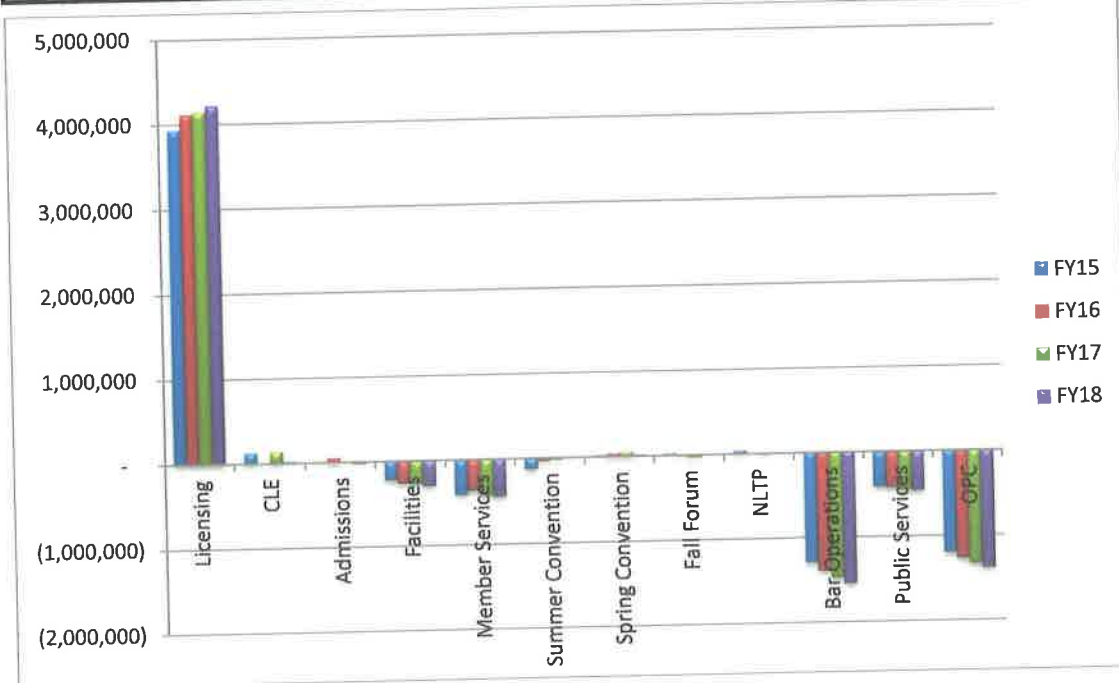
Expenses	Actual FY15	Actual FY16	Projected FY17	Budget FY18	% of Total	Trend
Licensing	142,172	101,761	101,420	115,000	1.6%	
CLE	527,352	586,914	513,719	552,826	8.3%	
Admissions	475,183	467,018	474,021	490,503	7.6%	
Facilities	530,330	528,309	524,293	548,267	8.5%	
Member Services	622,056	595,804	647,775	657,319	10.4%	
Summer Convention	233,641	229,468	211,279	257,201	3.4%	
Spring Convention	102,215	97,146	119,783	129,439	1.9%	
Fall Forum	86,389	143,518	160,546	111,312	2.6%	
NLTP	67,588	85,883	87,190	78,012	1.4%	
Bar Operations	1,360,756	1,461,586	1,558,845	1,627,665	25.1%	
Public Services	422,908	440,977	462,951	471,410	7.5%	
OPC	1,207,634	1,275,793	1,340,480	1,388,388	21.6%	
Total	5,778,224	6,014,179	6,202,300	6,427,343	95.3%	



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
FY18 Draft Budget
Net Profit (Cost) by Department**

Net profit (cost)	Actual FY15	Actual FY16	Projected FY17	Budget FY18	Trend
Licensing	3,933,906	4,115,865	4,139,139	4,216,400	
CLE	120,710	(16,544)	131,104	17,174	
Admissions	17,179	54,842	(9,171)	(17,098)	
Facilities	(217,435)	(253,900)	(266,313)	(290,287)	
Member Services	(400,131)	(355,209)	(417,071)	(430,522)	
Summer Convention	(118,693)	(31,023)	(22,267)	(201)	
Spring Convention	21,728	35,124	44,430	17,761	
Fall Forum	13,750	(22,526)	(31,285)	(312)	
NLTP	34,776	(6,855)	(18,619)	(5,578)	
Bar Operations	(1,292,028)	(1,391,307)	(1,473,586)	(1,542,096)	
Public Services	(402,234)	(418,321)	(447,417)	(454,074)	
OPC	(1,194,952)	(1,260,927)	(1,324,271)	(1,376,388)	
Total	516,576	449,219	304,673	134,778	



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
FY18 Draft Budget
Top 20 Gross Expense Categories (Based on FY16)

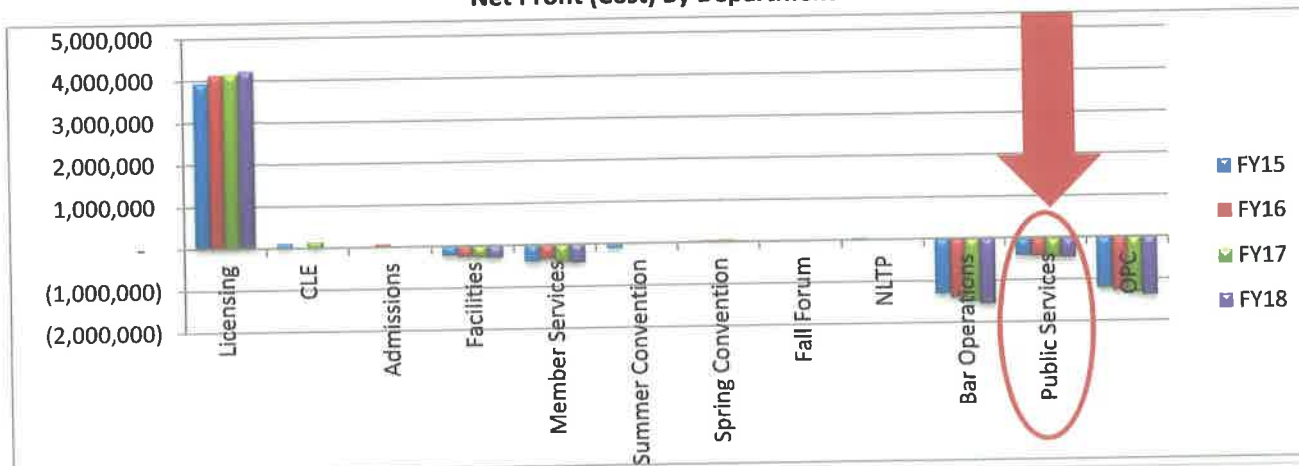
Rank	Top 20 Expense Categories	Actual FY15	Actual FY16	Projected FY17	Draft Budget FY18	% of Total	Trend
1	Salaries & Benefits	3,027,680	3,229,925	3,357,823	3,558,297	54.1%	
2	Food & Beverage Expenses	541,985	610,349	566,568	573,203	9.1%	
3	Depreciation	198,011	227,492	232,591	250,929	3.8%	
4	Building Overhead	206,950	208,274	219,223	230,055	3.5%	
5	Meeting Room Expenses	185,511	173,127	176,951	173,939	2.9%	
6	Copy/Printing Expense	163,375	165,316	138,295	132,135	2.2%	
7	Travel	109,854	119,223	132,038	147,010	2.1%	
8	3rd Party Revenue Sharing	84,689	79,988	70,969	70,000	1.1%	
9	Bar Exam Expenses	68,965	78,280	77,830	80,600	1.3%	
10	Casemaker	68,913	75,643	70,683	70,000	1.1%	
11	Blomquist Hale	73,887	73,966	73,951	75,000	1.2%	
12	Postage/Mailing Expense	67,177	72,378	47,929	49,083	0.8%	
13	LRE Support	65,000	65,000	65,000	65,000	1.0%	
14	Insurance Expense	59,689	64,620	65,159	66,962	1.1%	
15	Speaker Expenses	43,963	57,161	59,029	53,600	1.0%	
16	Outside Consultants	26,392	50,923	23,023	21,200	0.4%	
17	Telecommunications Expense	51,897	49,657	74,089	72,322	1.2%	
18	Office/Meeting Supplies	46,531	47,463	46,393	46,581	0.7%	
19	Credit Card Fees	63,874	45,161	46,140	45,660	0.7%	
20	MCLE Fees	39,566	40,866	42,246	38,000	0.7%	
	Other	584,316	477,664	616,369	607,767	9.9%	
	Total Expenses	5,778,224	6,012,475	6,202,300	6,427,343	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 accounts that make up 90% 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 10% 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 \$40,000 annually, or 0.5% of total expenses.

**Utah State Bar
FY18 Draft Budget
Public Services**

	Actual	Actual	Projected	Draft
	FY15	FY16	FY17	Budget
Program Net Cost				
Consumer Assistance Program (1 FTE)	98,142	115,605	124,306	128,920
Access to Justice (2 FTEs)	149,967	156,695	160,549	173,509
Tuesday Night Bar	35,628	37,305	35,038	35,840
LRE Contribution	65,000	65,000	65,000	65,000
UDR Contribution	10,000	-	10,000	-
Law Day	3,897	2,681	9,547	6,000
Staff time & other expenses associated with Committees	39,599	41,036	42,977	44,805
Public Service Programs Net Cost	402,234	418,321	447,417	454,074
Other Public Service Expenses Classified Elsewhere:				
Donation of Mercer royalty income to LHL	12,133	10,809	9,236	9,000
In Kind Contributions to UDR, LRE and other NFPs	34,326	29,671	25,030	25,030
Serving Our Seniors - YLD (estimated)	1,000	1,000	1,000	1,000
Wills for Heroes - YLD (estimated)	1,000	1,000	1,000	1,000
Other YLD Public Service Projects	-	-	2,950	2,950
Licensed Lawyer (some capitalized)	-	63,651	27,645	21,600
Total Other Public Service Expenses	48,458	106,132	66,861	60,580
Public Services Net Cost	499,150	630,585	581,139	575,234

Net Profit (Cost) By Department

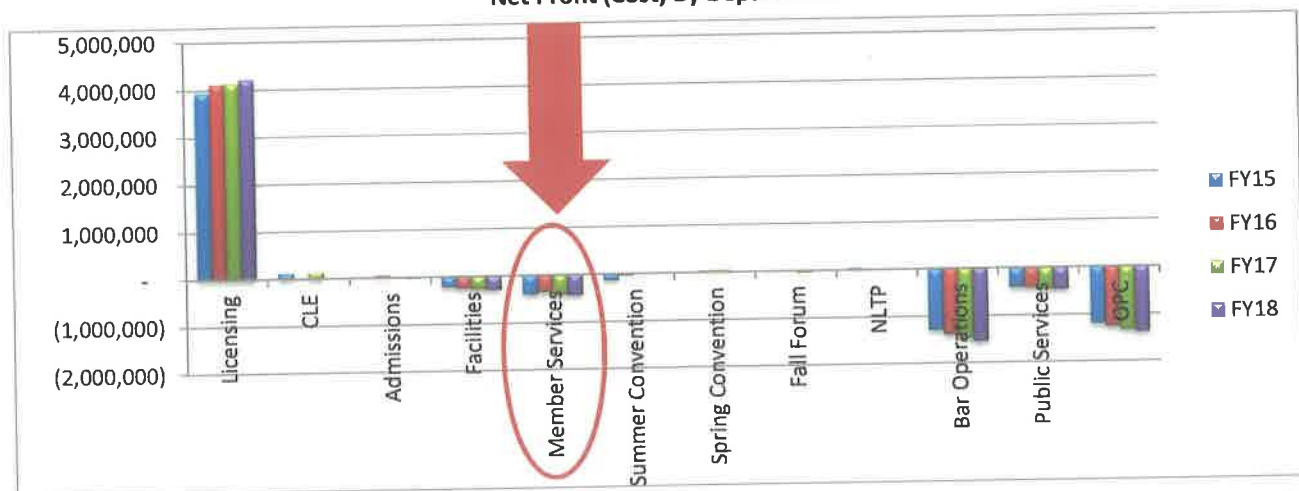


The above table shows the breakdown of Public Service expenses by program. The bar chart below the table depicts the net profit (cost) of each of the Bar's major functions and is presented to show how Public Services fits into the Bar's overall operations from a cost perspective. While it represents roughly 7% 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 FY18 Draft Budget Member Services

	Actual	Actual	Projected	Draft
	FY15	FY16	FY17	Budget
Program Net Cost				FY18
Bar Journal (0.5 FTE)	42,759	21,766	21,819	26,458
Blomquist Hale	73,887	73,966	73,951	75,000
Casemaker	68,913	75,643	70,683	70,000
Section Support (1 FTE)	1,264	2,048	834	568
Legislative	67,761	28,631	52,063	52,186
Public Education (1 FTE)	98,793	111,174	143,724	149,546
Young Lawyers Division	47,764	42,530	53,325	56,000
Staff time & other expenses associated with Member Benefits	(1,009)	(549)	672	764
Member Service Programs Net Cost	400,131	355,209	417,071	430,522
Other Member Services Expenses Classified Elsewhere:				
Leadership Academy	-	6,598	21,500	20,000
Bar Review	-	1,465	330	1,500
Breakfast of Champions	-	780	150	500
Bar Anniversary	-	15,782	-	-
Magna Carta Event	51,515	-	-	-
Total Other Member Service Expenses	51,515	24,625	21,980	22,000
Member Services Net Cost	451,646	379,834	439,051	452,522

Net Profit (Cost) By Department

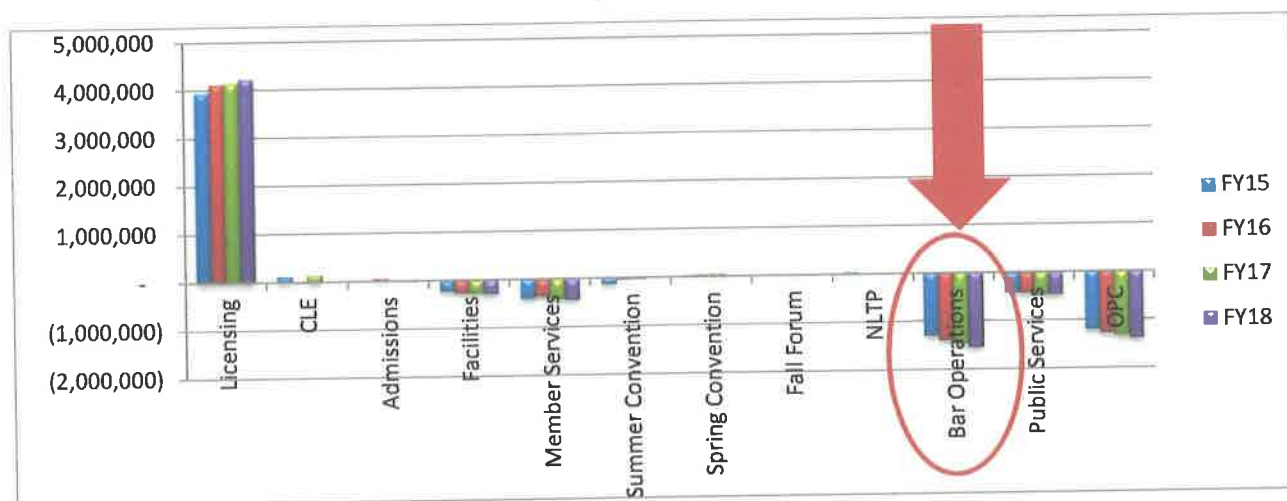


The above table shows the breakdown of Member Service expenses by program. The bar chart below the table depicts the net profit (cost) of each of the Bar's major functions and is presented to show how Member Services fits into the Bar's overall operations from a cost perspective. While it represents roughly 10% of the Bar's total expenses, it includes many of the Bar's discretionary programs and expenses.

**Utah State Bar
FY18 Draft Budget
Bar Operations**

	Actual	Actual	Projected	Draft Budget
	FY15	FY16	FY17	FY18
Program Net Cost				
Bar Management (4.5 FTEs)	687,549	720,598	692,948	739,827
General Counsel (2 FTEs)	202,728	247,838	280,532	289,045
IT (2 FTEs)	198,898	196,108	209,002	256,420
Commission/Special Projects	202,853	226,765	291,104	256,804
Bar Operations, net cost	1,292,028	1,391,307	1,473,586	1,542,096

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 (~\$30,000), 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
FY18 Draft Budget
Commission/Special Projects**

Sum of Amount Row Labels	(Projected)					Draft Budget FY18	Notes
	FY13	FY14	FY15	FY16	FY17		
85th Anniversary				15,782			
AAA Program (database modifications)				975			
ABA review				5,984			
Annual Report			627	465	500	500	
Awards	988	981	76	566	1,698	1,000	
Bar Review				1,465	1,330	1,500	
Books from Barristers	8,697	-917	590	-51	-14	0	
Breakfast of Champions				780	13	800	
Civics Education	596	1,088					
Commission Convention/CLE Registration Fees				7,851	21,611	25,000	Began charging for conventions/CLE in FY16
Commission Gifts	10,228	1,746	4,273	8,223	5,367	5,000	FY13 includes some FY14 expenses due to timing of purchases
Commission Meeting Expenses		1	873	1,436	1,223	3,000	
Commission Meeting Food & Beverage	13,779	18,823	15,848	15,559	23,022	22,000	FY17 includes \$12,000 commission lunch & dinner in San Diego
Commission Meeting Room Rental	1,721	6,616	7,596	6,294	7,568	6,000	
Commission Photo	724	810	604	571	761	700	
Commission Stationery			1,029	4,377	2,343	2,000	Formerly charged to Bar Mgmt
Copies	1,268	1,930	1,080	399	2,294	3,000	
E&O Insurance	7,718	8,256	8,802	3,000	4,797	6,000	Changed allocation methodology in FY16
eBulletin				756	178		Graphics for eBulletin
Election Expense	3,235	4,330	3,250	3,250	3,625	3,250	
Futures Commission		1,394	1,938	2,148			
Leadership Academy				6,598	21,497	20,000	
Leadership Conference	5,129	360					One-time training requested by Bar Pres; held at Little America
Licensed Lawyer				2,948	868		Other LL expenses charged to other depts & capitalized
Licensed Paralegal Practitioner				62	0		
Limited Scope Section					823	1,000	
Magna Carta Event			50,074	20			
Member Portal					917		Defining project scope & specs
Misc Technology Expense					527	500	
Office Supplies	398	446	578		250	500	
Past Presidents Book				5,803			
Past Presidents Lunch	2,010	2,826		391	1,874	2,000	
Postage/Mailing	1,514	1,044	1,312	233	1,032	800	
Pres/Pres-Elect Monthly "Stipend"	17,500	17,500	9,000	17,250	18,000	18,000	FY15 stipends were cut in half
President's expense	2,665	1,504	380	3,120	2,504	4,000	
Retreat	17,113	17,340	12,311	29,840	21,080	21,000	
Secret Santa	500	500					
Section Fair @ SJ Quinney College of Law				494			
Section Leadership Training	3,129	1,271					Commission sponsored in FY13 & 14 then CLE thereafter
SJ Quinney College of Law Building Donation	49,500						
Small Firm Tour					1,433	1,500	
Sponsorship	2,200	1,600	1,200	8,000	5,225	6,000	
Staff	8,732	5,745	11,287	8,042	11,600	10,754	
Steve Hughes (speaker)	4,190						
Tech & Innovation Committee					962		
Travel - AAA Taskforce					414		
Travel - ABA Delegates	4,960	7,114	8,675	8,541	9,329	11,000	
Travel - ABA Meetings	9,451	13,766	11,249	10,363	16,970	15,000	
Travel - Commission Mtgs	8,765	9,744	3,180	3,293	2,659	3,000	
Travel - Jackrabbit Bar	3,220	509	2,500	1,184	1,500	3,000	
Travel - Northwestern Bar Conf	1,984	1,561	599	979	1,500	3,000	
Travel - Other	426	1,769	695			10,000	
Travel - Spring Convention	6,936	9,398	8,689	13,599	12,288	14,000	
Travel - Summer Convention	23,321	26,559	21,258	23,388	36,355	25,000	San Diego averaged approx \$400 more per commissioner
Travel - Western States Bar Conf	23,741	7,238	13,284	2,785	10,685	7,000	FY13 included John & Richard's expenses
Website					6,000		website evaluation & scope
Wipfl review					28,500		
Grand Total	246,337	172,852	202,853	226,765	291,104	256,804	

This table shows spending by project in the Commission/Special Projects department over the last five years. FY13- FY16 are actual expenditures while FY17 is actual expenditures through 4/30/17 plus projected expenditures for the remainder of the year. Since expenses have not always been tracked by project, classifications may not be precise.

Utah State Bar
FY18 Draft Budget
Capital Expenditures

Category	FY12	FY13	FY14	FY15	FY16	Projected FY17	Draft Budget FY18	Total
Office furniture & fixtures	11,192	17,741	26,002	3,433	-	779	3,000	62,147
Meeting room furniture & fixtures	19,381	21,359	-	-	-	-	-	40,740
Office equipment (copiers, phones, fax, projectors, mail machine, etc)	44,458	11,617	10,472	-	-	41,699	-	108,245
Building improvements	-	325,968	361,966	6,365	-	-	5,250	699,549
Computer equipment/servers/software	7,036	7,473	61,770	21,721	14,913	37,811	35,674	186,398
OPC database software (New Dawn/Journal Technologies)			32,227	100,224				132,451
Membership database (Euclid - ClearVantage)			274,181	50,966	7,020	20,000	38,000	390,167
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	20,000	73,972
New Website (EKR) - based on proposal						30,000		30,000
Practice Portal (Euclid) - based on proposal						33,000	30,000	63,000
Total	82,066	384,158	811,618	214,729	103,078	167,715	131,924	1,895,288

Annual Maintenance Contracts (expensed over maintenance period):	FY12	FY13	FY14	FY15	FY16	Projected FY17	Draft Budget FY18	Total
ClearVantage Annual Maintenance (Euclid)					25,160	26,360	27,000	78,520
Licensed Lawyer Annual Hosting Fee (Euclid)						6,600	6,600	13,200
Journal Technologies Annual Maintenance				6,211	6,521	6,848	7,000	26,580
Synergy (Box Lake Networks) Admissions Database Annual Maintenance				3,900	3,900	3,900	4,000	15,700
Total				10,111	35,581	43,708	44,600	134,000

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 continue into FY18 as 67% of the capital budget is for software projects. Most purchased software also requires annual maintenance contracts (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
FY18 Draft Budget
Projected Cash Reserves**

Projected Cash Reserves, 6/30/17	\$ 4,010,000
Add: FY18 budgeted change in cash	273,783
Projected Cash Reserves, 6/30/18	<u>4,283,783</u>
Board Designated Reserves:	
Operations Reserve (6 months' operations)	3,213,671
Capital Replacement Reserve - Equipment	200,000
Capital Replacement Reserve - Building	650,000
Total Board Designated Reserves	<u>4,063,671</u>
Other Contingency Reserve	<u>200,000</u>
Excess Cash Reserves over Board Designated & Contingency Reserves	<u>\$ 20,111</u>

President: Jaelynn Jenkins
 President-Elect: Dani Cepernich
 Treasurer: Audrey Phillips
 Secretary: Bebe Grill



March 31, 2017

Utah State Bar Commission
 645 South 200 East
 Salt Lake City, Utah 84111

Re: Young Lawyers Division 2017-2018 Budget Request

Dear Bar Commissioners:

As the incoming President of the Utah State Bar Young Lawyers Division, I am writing to you to respectfully request that you allocate \$56,000 to YLD for the 2017-2018 fiscal year, the same amount that was allotted during the previous year. Attached for your review is our proposed budget, as well as the budgets from the past three years. YLD plans to maintain its successful programs and activities in addition to expanding upon the two newest programs, the West Jordan Pro Bono Clinic and Fit2Practice.

The proposed 2017-2018 budget allocates funds to the YLD programs and activities in roughly the same amount as in prior years. Below is an outline of some of the existing programs and activities we plan to continue from prior years. I have also provided a detailed explanation of major funding requests.

Current YLD Programs and Activities

Community Service Programs

- Tuesday Night Bar – This is one of the bar's most widely known and widely attended programs, where members of the public can sign up in advance to receive free legal consultation on a variety of legal issues. The program is co-coordinated with the bar and YLD and is staffed largely with YLD members.
- Wills for Heroes – Since it began in 2006, this program serves approximately 300 first responders (police officers, firefighters, and EMTs) each year, preparing estate planning documents free of charge. The program is coordinated and staffed by YLD volunteers and has served over 4,500 individuals and families to date.
- Serving Our Seniors – This is a popular program implemented and run by YLD in which volunteer attorneys and paralegals host legal clinics at retirement homes and community centers around the state, helping senior citizens prepare advanced healthcare directives and power of attorney documents.

- Disaster Response – As part of the ABA Young Lawyers Division, YLD has a standing agreement to provide free legal services to victims of disasters by helping victims with disaster-related issues and disaster relief funding. This program, as well as the related programs instituted by local bar associations, helps thousands of disaster victims across the country each year. This year, the Nevada Young Lawyers Section has provided emergency legal services to flooding victims in Northern Nevada; the ABA YLD remains ready to assist should the flooding become more serious.
- Veterans Clinic – Started by YLD in 2013, the Veterans Clinic provides veterans at the VA Hospital with free legal advice on a number of topics including healthcare issues, family law, and estate planning.
- Cinderella Boutique/Professional Clothing Drive – Not all of YLDs programs are based on the practice of law. The Cinderella Boutique and Professional Clothing Drive take donations of formal dresses and professional clothes and lend them to low-income students for proms or other formal occasions. This increases the public profile of lawyers in the community and exposes students to professionals they otherwise may not have met and a profession they may not have otherwise considered.
- And Justice For All Co-Projects – YLD has a long tradition of partnering with And Justice For All on various programs like “Bar Sharks for Justice” and the Law Day 5k.

Legal Education Programs

- Practice in a Flash – These 1-hour CLE sessions are free for YLD members and typically feature presenters who are also young attorneys. The sessions are recorded, and we hope to make a collection of recordings available in an online library along with forms and sample pleadings as additional resources for YLD members to access. Topics range from different practice areas, to ethics, to managing your own solo practice.
- Law Day – Our division heavily supports this annual bar-sponsored event, a YLD liaison serves on the Law Day Committee, and YLD contributes financially and through volunteer work to the Law Day festivities.
- High School Debate Tournament – Many future lawyers participate in competitive speech and debate in high school. For that reason, YLD co-sponsors an annual high school debate tournament each year and young lawyers volunteer to judge the final rounds.

Networking Events

- Young Professional Networking Events – In 2016, YLD hosted a young professional networking event in partnership with the Young Architects Forum, the Society of Civil

Engineers Younger Members Forum, Women in Transportation, and Young Professionals of Salt Lake. Approximately seventy-five members from these various groups attended. Following the event, YLD has been invited to and participated in events hosted by the other groups. YLD is planning a similar young professional networking event for Spring 2017 and will do the same in 2018.

- Utah State Bar Conventions/Forums – During the 2016 Fall Forum conference, YLD hosted a mixer that brought together YLD and members of the Bar in general. The YLD continues to seek ways by which it can encourage and support its membership in attending the Utah Bar Annual Convention, the Fall Forum, and the Spring Convention. We hope to support young lawyer involvement and attendance at these conferences by our officers, board members, and membership at large by helping with travel fees and expenditures, as well as planning events and activities for YLD members at the events.
- Opening/Closing Socials – These events are both YLD traditions that many members of our division look forward to as a way of socializing, networking, and celebrating the opening and closing of the year.
- New Lawyer Mentoring Social – Co-sponsored with the New Lawyer Training Program, this event is an opportunity for newly admitted lawyers to network with each other and with the more established members of the bar who have volunteered to serve as NLTP mentors.
- Law Student to Lawyer – Formerly known as the “Mentoring Marathon,” YLD hosts an annual event for law students designed to assist with the transition from law school to practicing law. The students attend several panel presentations on various topics, usually featuring young lawyers. They additionally attend a resume review session, where they have the opportunity to have their resume reviewed by three practicing attorneys in one-on-one meetings.
- Speed Networking Social – Each year, YLD hosts a speed networking event that is modeled after “speed dating,” during which young lawyer attendees are introduced to and get to spend three minutes talking to seasoned lawyers. The event seeks to foster professional relationship within the Utah legal community, as well as assist in job searches and the building of referral and mentoring networks.

Recent Programs & Initiatives for 2017-2018

- West Jordan Pro Bono Clinic – In June 2016, YLD began serving as the lead anchor for the West Jordan Pro Bono Clinic covering the Landlord Tenant Pro Se Calendar at the Third District courthouse in West Jordan. As part of this clinic, young lawyers enter a limited appearance on behalf of pro se litigants involved in landlord-tenant disputes, primarily evictions. This program provides legal services to an underserved portion of

the population and provides valuable courtroom experience for young lawyers. As part of this program, YLD has offered CLEs to train young lawyers on the area of law. For the 2017-2018 year, YLD plans to strengthen its role as the anchor for the West Jordan Pro Bono Clinic, providing additional CLEs and training resources for volunteers, as well as creating an interface to better facilitate recruiting and communicating with volunteers.

- Fit2Practice Utah – Modeled after the ABA YLD Fit2Practice program, Fit2Practice Utah is a yearlong health and wellness initiative introduced in 2016. The program seeks to educate and inform young lawyers and lawyers in Utah in general about the professional benefits of maintaining a healthy life style. The program will utilize events such as lunch and learns in conjunction with articles and social media to educate and encourage participation. For the 2017-2018 year, YLD plans to expand on the program, hosting fitness events free of charge for YLD members, creating fitness challenges, featuring a fitness-focused (mental, emotional, or physical) lawyer in each edition of the bar journal, and offering quarterly CLE programming.
- Increased Regional Focus – Utah's population is divided between a few population centers, although most bar-related activities occur in the Salt Lake Valley. For the 2017-2018 year, YLD is focused on expanding its reach and engaging its members across the state by working with liaisons from each region to host socials, CLEs, and other programming.

Explanation of Major Budget Items

- Social Activities & Events – The YLD social activities and events allow YLD members to network with each other and build relationships crucial to their legal practice. The events also expose YLD members to the many service projects offered by YLD and the Bar. Social events are integral to the success of any organization as they serve to foster and build social ties between the members.
- YLD Leadership Summit – For the past three years, the YLD officers and board members have held a one-day leadership summit. The summit serves to train the leadership and offer an intense and focused brainstorming session regarding issues and projects for the organization. The summit includes team-building exercises to strengthen the board and officers. As a result, the YLD has seen increased buy-in and commitment from its officers and members to the organization and the membership. This year's summit will include introductions, a review of the year's agenda, a presentation of the year's action plan, and team building exercises. Funds for this event will be used for the venue, food/drink, transportation, team-building activities and training materials.
- ABA Conferences – ABA conferences serve as an important resource for leadership training and provide a unique opportunity to compare notes and obtain ideas from young lawyer organizations from across the United States. Many of our successful programs

have been developed or tailored after programs initiated by the ABA YLD or its affiliates including Wills for Heroes and the Cinderella Boutique.

- Attendance and participation in these conferences establishes the Utah State Bar, through its YLD leadership, as a national leader for community service projects and training programs for young lawyers. In the past few years, during these conferences, Utah's YLD has been honored with awards for the successful implementation of programs. During the annual and mid-year ABA conferences, Utah YLD members vote in the ABA YLD assembly, playing a part in the governance of the ABA YLD and helping guide the resolutions it submits to the ABA.

Summary

YLD is a proud division of the Utah State Bar and serves as an introduction to life as a lawyer and involvement with the Utah State Bar Association. Many young lawyers who accept leadership positions with YLD go on to serve in leadership positions with the bar. YLD sets a tone of service, education, and professionalism early in a young lawyer's career.

While much of YLD's success relies on the volunteerism and good will of the young lawyers in the State of Utah, YLD cannot continue without the funding requested in this proposal. The requested funds will allow YLD to continue quality programming and events that the Utah legal community and the community in general have come to expect. The requested funds support the YLD in delivering desperately needed professional services to underserved parts of the community. For these reasons, I respectfully request that the Bar Commission allocate \$56,000.00 to YLD for the 2017-2018 year.

If you have any additional questions about YLD or our proposed budget, please feel free to contact me at 801-322-9264 or at dnc@scmlaw.com. Thank you for your consideration and support.

Respectfully,



Dani Cepernich
YLD President 2017-2018

YLD 2017-2018 BUDGET PROPOSAL		
ACTIVITIES AND COMMITTEES	2016-2017 Budget	2017-2018 Budget
Executive Committee:		
Quarterly Executive Committee Meetings	1,000.00	500.00
Committee-President Meetings	600.00	600.00
Miscellaneous Requests	1,400.00	950.00
TOTAL Executive Committee	3,000.00	2,050.00
Professional Development Committee:		
Annual Leadership Retreat	5,000.00	4,000.00
Practice in a Flash Series	500.00	500.00
Trial Advocacy 101 Series	500.00	-
Bar Review	500.00	500.00
Utah County CLE	500.00	300.00
Fit2Practice	-	1,000.00
TOTAL Professional Development Committee	7,000.00	6,300.00
Social Activities Committee:		
Law Students to Lawyers (prev. Mentoring Marathon/Law School to Lawyer)	500.00	500.00
Young Professional Mixer (Networking)	1,000.00	1,000.00
Speed Networking (\$1,000 additional donation by firm)	1,000.00	1,000.00
New Lawyers Socials	1,200.00	1,200.00
Opening Social (\$1,000 additional donation by firm)	3,000.00	3,000.00
Closing Social	3,000.00	3,000.00
Fall Forum After Party	800.00	800.00
Committee Meeting(s)	-	100.00
TOTAL Social Activities Committee	10,500.00	10,600.00
Public Service Committee:		
Bullyproof	200.00	-
Cinderella Boutique	500.00	500.00
Green Utah	150.00	-
High School Debate	1,000.00	1,000.00
Outreach & Volunteer	300.00	300.00
Project Street Youth	600.00	600.00
Serving Our Seniors	1,000.00	1,000.00
Veterans Clinic	500.00	500.00

Wills for Heroes - Operating Costs	1,000.00	1,000.00
Tuesday Night Bar	100.00	100.00
Development of Virtual Legal Clinic	100.00	100.00
West Jordan Pro Bono Legal Clinic	-	500.00
Committee Meeting(s)	-	100.00
TOTAL Public Service Committee	5,000.00	5,700.00
Liaisons:		
ABA District Representative	2,000.00	2,000.00
And Justice for All	250.00	250.00
Northern Utah	-	200.00
Central Utah	-	200.00
Southern Utah	-	200.00
Disaster Legal Response Committee Liaison	-	250.00
Gov. Relations	-	-
Law Day	900.00	900.00
LALU	-	-
Modest Means	-	-
Paralegal Division	500.00	500.00
Pro Bono Commission	-	-
BYU Law Students	200.00	200.00
U Law Students	200.00	200.00
Utah Bar Journal	250.00	250.00
UMBA	600.00	600.00
WLU	-	-
TOTAL Liaisons	4,900.00	5,750.00
Conferences:		
Utah Bar Spring Convention 2018, St. George	1,000.00	1,000.00
Utah Bar Convention 2018, Sun Valley	3,000.00	3,000.00
ABA Annual Meeting 2017, New York	2,000.00	4,500.00
ABA YLD Fall Conference 2017, Denver (2016 – Detroit)	4,000.00	2,500.00
ABA Midyear Meeting 2018, Vancouver (2017 – Miami)	5,000.00	5,000.00
ABA YLD Spring Meeting 2018, Louisville (2017 – Montreal)	5,000.00	3,000.00
Four Corners Regional Conference	-	1,000.00
TOTAL Conferences	20,000.00	20,000.00

Board Resources:		
Food & Beverage	2,500.00	2,500.00
End of year appreciation for board members	1,250.00	1,250.00
Reserve (website, mail chimp, etc.)	1,850.00	1,850.00
TOTAL Board Resources	5,600.00	5,600.00
GRAND TOTAL	56,00.00	56,000.00

PAST YLD BUDGETS		
Programs & Activities:	2014-2015	2015-2016
Law Day	\$900.00	\$900.00
YLD Opening Social	\$3,500.00	\$3,250.00
YLD Closing Social	\$2,000.00	\$2,000.00
Co-Sponsored Activities	\$5,000.00	\$5,000.00
Tuesday/Wednesday Night Bar	\$240.00	\$250.00
Community Service	\$3,500.00	\$3,500.00
Wills for Heroes	\$2,750.00	\$2,000.00
Public Education (including Choose Law and Bullyproof)	\$600.00	\$500.00
And Justice for All	\$250.00	\$250.00
Veterans Clinic	\$1,000.00	\$1,000.00
CLEs (including Practice in a Flash and Trial Adv. Institute)	\$1,500.00	\$1,000.00
Bar Journal	\$0.00	\$50.00
Utah Debate Tournament	\$1,000.00	\$1,000.00
Law School Division	\$0.00	\$0.00
Paralegal Division	\$0.00	\$0.00
Disaster Relief	\$0.00	\$0.00
Career Advancement (incorporated into other areas)	\$100.00	\$0.00
UMBA Banquet	\$600.00	\$600.00
Serving our Seniors	\$350.00	\$350.00
Green Utah	\$100.00	\$100.00
Publicity Coordination	\$0.00	\$0.00
YLD Leadership Summit	\$7,500.00	\$7,000.00
Street Youth	--	\$800.00
TOTAL Programs & Activities:	\$31,840.00	\$30,500.00
Conferences:		
Utah Bar Convention	\$1,210.00	\$500.00
ABA Annual Meeting	\$4,000.00	\$4,000.00
ABA YLD Fall Conference	\$4,000.00	\$4,000.00
ABA Midyear Meeting	\$4,000.00	\$4,000.00
Utah Bar Spring Convention	\$0.00	\$0.00
Four Corners Summit	--	\$2,000.00
ABA YLD Spring Meeting	\$4,000.00	\$4,000.00
TOTAL Conferences:	\$17,210.00	\$18,500.00
Board Resources:		
Executive Committee	\$3,200.00	\$3,000.00
Food & Beverage	\$2,500.00	\$2,500.00
End of year appreciation for board members	\$1,200.00	\$1,000.00
Reserve	\$500.00	\$500.00
TOTAL Board Resources:	\$7,400.00	\$7,000.00
GRAND TOTAL:	\$56,000.00	\$56,000.00

UTAH LAW RELATED EDUCATION

HISTORY AND MISSION

The national Law-Related Education (LRE) movement began over forty-five years ago. The mission of LRE nationally and Utah Law Related Education is two-fold:

- To provide law-related and citizenship education through interactive educational experiences and curricula which foster in youth and communities an understanding of the law, the legal system, and their rights and responsibilities as engaged citizens.
- To help our youth develop the knowledge, skills, and attitudes of effective, engaged citizens and to avoid delinquent behavior.

In 1974, former Governor Scott and Norma Matheson, together with federal Judge J. Thomas and Kay Greene, created Utah Law Related Education to provide law-related and citizenship education for Utah's youth and communities through interactive educational experiences. Utah Law Related Education has trained thousands of youth and adult community members, including educators, attorneys, court employees, juvenile justice professionals, and other legal professionals, through a host of institutes, seminars, courses, and programs, such as the Mock Trial Competition, Salt Lake Peer Court Program, *We the People--The Citizen and the Constitution* Program, *We the People--Project Citizen* Program, elementary and secondary Mentor/Dialogue on Democracy Programs, Teaching Law in the High Schools Seminar at the S.J. Quinney College of Law, Court Tour Programs, Youth Summits, *We the People Initiative for High-Needs Students*, Representative Democracy in America, Conflict Management Programs, and Juvenile Justice Programs.

CURRENT PROGRAMS AND ACTIVITIES

MOCK TRIAL PROGRAM: In February and March 2017, more than 800 junior and senior high school students across Utah tried a criminal case in which a fire destroyed 1,875 acres in Elk Creek State Park, including Elk Creek State Campground. While no one was killed in the fire, over 50 individuals were treated for smoke inhalation, and many suffered first- and second degree burns. The fire, which spread through the campground's 75 camping sites, destroyed 47 RVs, 23 boats, 12 ATVs, 53 trucks, 14 automobiles, and 17 tents. Through the course of an investigation into the cause of the fire, it was discovered that a private property owner, Lee Morgan Hatch, had built a fire on his/her neighboring property earlier in the night in celebration of the Memorial Day holiday. Given the windy conditions that evening, the prosecution alleged that sparks flew from Hatch's fire into the air; specifically, into Elk Creek State Park, thereby igniting trees and brush. The eyewitness testimony from those at the party differed on the nature and size of Hatch's fire, and the two experts disagreed on the cause of the fire.

The Prosecutor stated on information and belief that the defendant committed the following: Causing a Catastrophe, a second-degree felony, or, in the alternative, the lesser included offenses of Reckless Burning, a class A misdemeanor, and Abandoning a Fire, a class A misdemeanor.

More than 300 judges, attorneys, and community representatives volunteered their time as judges and attorney coaches in over 100 mock trials which were held in Salt Lake valley courtrooms. The high school and junior high school championship rounds were held in the Court of Appeals Courtroom in the Scott M. Matheson Courthouse. Integritas was the championship team in the high school division, with Wasatch Independent League of Debate, senior division, placing second. Integritas will participate in the National Mock Trial Competition in New Haven, Connecticut, in May. In the junior high school division, Central Davis Junior High School was the championship team, with Wasatch Independent League of Debate, junior division, placing second. Both state champion teams will be honored at the Law Day Luncheon on May 1.

The Utah State Bar and Utah Law Related Education co-sponsored a two-hour Continuing Legal Education experience for mock trial judges and attorney coaches.

WE THE PEOPLE--THE CITIZEN AND THE CONSTITUTION: The primary goal of *We the People--The Citizen and the Constitution* is to promote civic competence and responsibility among the nation's elementary and secondary students. What makes this program so successful is the design of its instructional program, including its innovative culminating activity.

The foundation of the program is the classroom curriculum. It complements the regular school curriculum by providing upper elementary, middle, and high school students with an innovative course of instruction on the history and principles of constitutional democracy in the United States. The textbooks are designed for a wide range of student abilities and may be used as a supplemental text or for a full semester of study. Critical-thinking exercises, problem-solving activities, and cooperative-learning techniques help develop intellectual and participatory skills while increasing students' understanding of the institutions of American constitutional democracy. After studying the textbook, students take a multiple-choice test and prepare for the simulated congressional hearing which is the culminating activity for the program. The entire class, working in cooperative teams, prepares and presents statements before a panel of community representatives who act as congressional committee members.

On January 9, 2017, four high schools in Utah participated in the state mock congressional hearings at the Utah State Capitol, with an awards luncheon following the competition. Lieutenant Governor Spencer Cox spoke to the students. Sky View High School's class won the competition, with Mountain Crest High School placing second. More than 1,200 high school students and their teachers, including Sky View and Mountain Crest students and teachers, will participate in the *We the People* national finals in Washington, D. C. at the end of April. Four junior high school classes participated in the state mock congressional hearings on February 8 at the Utah State Bar Law and Justice Center. Judge Royal Hansen spoke to the junior high school students. Pleasant Grove Junior High School was the winner, with Oak Canyon Junior High School placing second.

WE THE PEOPLE--PROJECT CITIZEN: A curricular program for high school, middle-grade students, and youth groups, *We the People--Project Citizen* promotes competent and responsible participation in local and state government. The program helps young people learn how to monitor and influence public policy. In the process, they develop support for democratic values and principles, tolerance, and feelings of political efficacy.

Entire classes of students or members of youth organizations work cooperatively to identify a public policy problem in their community. They then research the problem, evaluate alternative solutions, develop their own solution in the form of a public policy, and create a political action plan to enlist local or state authorities to adopt their proposed policy. Participants develop a portfolio of their work and present their project before a panel of community members. One exemplary portfolio is selected to send to the annual *Project Citizen* National Showcase. State legislators from across the nation serve as evaluators, determining the level of achievement attained by each portfolio.

SALT LAKE PEER COURT: Salt Lake Peer Court provides an alternative approach to juvenile justice in which youth referred for minor offenses are sentenced by a jury of their peers. Using a restorative justice-based approach, Salt Lake Peer Court provides early intervention for a variety of offenses, such as truancy, fighting, tobacco/alcohol, bullying, theft, assault, and disorderly conduct; holds the referred youth accountable for their actions; provides educational experiences to assist them in building the skills necessary to change their problem behaviors; and helps them strengthen their ties to school, community, and positive peer role models. Approximately 80% of the referred youth come from low-income families who might not otherwise have access to support services, including a variety of community agency programs.

From August 1, 2015 to July 31, 2016, 110 Peer Court youth volunteers, approximately 50% of whom were minority youth, were selected from Salt Lake City high schools. The 40 advisors were from the community-at-large, including University of Utah law students and Bennion Center students. Peer Court adjudicated approximately 275 new and carry-over cases from Salt Lake School District resource officers, administrators, counselors and social workers, elementary through high school.

Students conducted court hearings in six juvenile court courtrooms each Monday evening from 5:45 p.m. to 8:00, September through May, in the Scott M. Matheson Courthouse. Referred youth are required to attend with a parent or guardian. Salt Lake School District translators are used for families who do not speak English. Many of the Peer Court members and advisors are bilingual (Spanish/English), so court sessions may be conducted in Spanish when the need arises.

The student volunteers, who adjudicated and mentored the referred youth, received initial and ongoing training, including conflict resolution, mediation, bias awareness, communication skills, restorative-justice concepts, peer mentoring, team building, and courtroom procedures. The approximately 40 adult volunteers received similar training and were assigned to student volunteers with whom they attended the court hearings to provide support and guidance when needed.

In a typical court hearing, a panel of seven student volunteers questions the referred youth and parent(s) to gain an understanding of the youth and the offense. The panel members deliberate and assign a disposition which provides educational and/or community service opportunities. During deliberation, one of the Peer Court panel members elects to be the personal mentor for each referred youth. The student mentor follows up with a weekly contact, thereby supporting and encouraging compliance until the disposition is completed. Peer Court members and advisors participate in other activities, such as the annual swearing-in ceremony, ongoing training, Youth Summits, presentations to civic groups, and youth conferences.

COURT TOUR PROGRAM: Utah LRE promotes the court tour program at the Scott M. Matheson Courthouse. ULRE's Court Tour manual, *Your Day in Court*, is distributed to all teachers who schedule a tour at the Matheson Courthouse.

YOUTH SUMMIT: In August 2016, Salt Lake Peer Court conducted the annual two-day Youth Court Summit at Camp Tuttle in Big Cottonwood Canyon, where peer court members and advisors received initial training in conflict resolution, mediation, communication skills, restorative- justice concepts, peer mentoring, team building skills, and courtroom procedures. Follow-up training sessions continued throughout the year.

REPRESENTATIVE DEMOCRACY IN AMERICA: Representative Democracy in America is designed to reinvigorate and educate Americans on the critical relationship between government and the people it serves. The program introduces citizens, particularly young people, to the representatives, institutions, and processes that serve to realize the goal of a government of, by, and for the people. Through the Representative Democracy program, Utah teachers statewide have received the innovative educational materials for K-12 classrooms and have participated in professional development opportunities.

TEACHING MATERIALS/PUBLICATIONS: Utah LRE produces publications to enable those who teach our youth and communities to integrate law-related education into their curriculum. In the last year, Utah LRE produced and helped distribute statewide the *2017 Mock Trial Competition Handbook* and *Your Day in Court*. Many of our teaching materials are available for downloading from our website, www.lawrelatededucation.org, along with information about our programs and activities.

COMMUNITY NEED, INDIVIDUALS TO BE SERVED IN 2017-2018, AND GEOGRAPHIC REGION SERVED

One measure of community need is the requests from schools and communities for teacher training, workshops, and programs. Through law-related education, students and community members learn about the foundations of our constitutional republic, its laws, its legal system, and their rights and responsibilities as engaged citizens. This understanding promotes social responsibility and a commitment to good citizenship.

Data collected nationwide from law-related education programs continues to show that properly implemented law-related education programs can improve knowledge of the law; increase awareness of the law and positive attitudes toward law and authority; and reduce delinquent behavior.

Through its law-related education programs, Utah LRE serves approximately 20,000 youth and community members each year. Elementary and secondary school students from Tooele County to Uintah County and from Cache and Box Elder Counties to Washington and San Juan Counties have participated in Utah LRE's programs.

PERSONNEL PROVIDING SERVICES

Kathy D. Dryer, an attorney and the director of Utah Law Related Education, oversees all ULRE programs.

Kayley Richards, program director of Salt Lake Peer Court, oversees all Peer Court activities. Jenny Sanchez, Salt Lake Peer Court's program coordinator, provides overall program assistance.

Victoria Dyatt is the mock trial coordinator, and Dawn Harvey is the state coordinator for the *We the People--the Citizen and the Constitution* program. William Gillespie, Andrea Thompson, William Spence, and Laurie Wirz are the congressional district coordinators for the *We the People* program. Brian Beal is the state coordinator for the *We the People--Project Citizen* Program.

VOLUNTEERS

Over 600 committed and dedicated attorneys, community members, and youth volunteer with Utah LRE each year. In our *mock trial competition*, they volunteer as judges for the over 100 junior high and high school mock trials and as attorney coaches for mock trial teams. For our *We the People--The Citizen and the Constitution* program, they volunteer their time to be judges, facilitators, and timers at our junior high and high school district and state mock congressional hearings. Our *Salt Lake Peer Court* student volunteers adjudicate and mentor the referred youth, and our adult Peer Court volunteers are assigned to student volunteers with whom they attend the court hearings to provide support and guidance when needed.

IN-KIND CONTRIBUTIONS

- Over 6,000 hours are donated by 600 attorneys and other community volunteers yearly.
- The Utah State Bar provides: 1) Office space free-of-charge for Utah Law Related Education, and 2) Rooms free-of-charge for meetings and trainings at the Law and Justice Center.
- Access to over 130 courtrooms is provided each year by the Administrative Office of the Courts for our Mock Trial and Salt Lake Peer Court programs.
- A tax manager, who is an accountant, is Utah Law Related Education's financial advisor.
- Internet services are provided by XMission.

Attachments: List of Board of Directors
Financial Statement

**UTAH LAW RELATED EDUCATION
Board of Directors
2016-2017**

Judge Augustus G. Chin
Holladay Justice Court

Bruce R. Baird
Attorney At Law

Mary Draper, Chair
Guadalupe School

Kathy D. Dryer
Utah Law Related Education

Alan P. Hawkins, Vice Chair
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Character Education

Kathi Sjoberg, Secretary
Davis County Attorney's Office

Gregory G. Skordas
Skordas, Caston and Hyde, LLC.

Utah Law Related Education
Statement of Revenue and Expenses
Actual and Projected Operating Budgets
Fiscal Year July 1 to June 30

	Actual	*Actual & Projected	*Projected
	2015-16	2016-17	2017-18
Revenue			
Bastion Foundation	2,000	0	0
Center for Civic Education	0	1,500	1,500
Commission on Civic Education	30,000	60,000	70,000
Community Development Block Grant	10,000	7,500	0
George and Dolores Dorè Eccles Foundation	6,500	6,500	6,500
Individual Donors	1,000	2,300	2,600
Marriner S. Eccles Foundation	5,000	5,000	5,000
R. Harold Burton Foundation	6,000	6,000	6,000
Salt Lake City Police Department	10,000	10,000	10,000
Salt Lake City Police Foundation	5,000	0	0
Salt Lake City School District	25,000	25,000	25,000
Utah Bar Foundation	50,000	50,000	50,000
Utah State Bar	65,000	65,000	65,000
Walmart	1,000	700	700
Total Grants	216,500	239,500	242,300
Fees	4,000	4,000	4,000
Mock Trials	3,200	3,000	3,000
CLE Seminars			
Earned Income	1,000	1,000	1,000
Total Revenue	224,700	247,500	250,300

***\$67,000 one-time generous funding from the Utah Bar Foundation** has been granted to further civic education by expanding the number of students served by Utah Law Related Education. The approximate allocation is as follows: Salt Lake Peer Court, \$20,000; We the People: The Citizen and the Constitution, \$25,000; Mock Trials, \$15,000; We the People: Project Citizen, \$7,000. Plans to expand the reach of our programs to include and to train more students and teachers statewide have been and are being developed.

A Tax Manager at Jeff Hill, LLC., who is an accountant and member of Utah Law Related Education's Board of Directors, is the financial advisor. Due to funding limitations, an audit has not been completed.

Expenses	Actual 2015-16	Actual & Projected 2016-17	Projected 2017-18
Administrative	42,500	42,000	42,000
Salaries and Fees	2,000	2,000	2,000
Benefits/Insurance	3,000	3,000	3,000
Web Site Consultant	10,000	10,000	10,000
Operating Expenses	3,000	3,000	3,000
Materials and Supplies	60,500	60,000	60,000
Total Administrative Expenses			
Mock Trials	17,000	17,000	17,000
Salaries and Fees	23,500	31,500	31,500
Materials and Supplies/National Mock Trial Finals	40,500	48,500	48,500
Total Mock Trial Expenses			
Representative Democracy in America	0	1,000	1,000
Salaries and Fees	0	1,000	1,000
Materials and Supplies	0	2,000	2,000
Total Representative Democracy in America Expenses			
Salt Lake Peer Court	52,000	52,000	52,000
Salaries and Fees	14,000	14,000	14,000
Conferences, Workshops, and Trainings	4,000	4,000	4,000
Operating Expenses	5,000	5,000	5,000
Materials and Supplies	75,000	75,000	75,000
Total Salt Lake Peer Court Expenses	0	0	0
Teaching Law in the High Schools			
We the People: The Citizen and the Constitution	11,300	16,000	16,000
Salaries and fees	600	600	600
District Congressional Hearings	5,000	5,000	10,000
State Congressional Hearings	10,000	10,000	10,000
National Congressional Hearings Travel	4,000	7,000	7,000
Congressional District Coordinators/Trainings	4,000	4,000	3,800
Operating Expenses	8,400	12,000	10,000
Materials and Supplies, including classroom texts and awards	43,300	54,600	57,400
Total We the People: The Citizen and the Constitution			
We the People: Project Citizen	4,000	5,000	5,000
Salaries and Fees	0	0	0
Showcase	1,000	2,000	2,000
In-service Training	200	200	200
Operating Expenses	200	200	200
Materials and Supplies, including classroom texts and awards	5,400	7,400	7,400
Total We the People: Project Citizen Expenses			
Total Expenses	\$224,700	\$247,500	\$250,300

SUPPLEMENTAL SCHEDULES

Utah State Bar
Preliminary FY2018 Budget - Summary by Department
Based on Actual Results through 4/30/17

	Actual FY 2015	Actual FY 2016	Projected FY 2017	Draft Budget FY 2018	\$ Change 2016 Projected vs 2017 Budget	% Change 2016 Projected vs 2017 Budget
Revenue						
Licensing	4,076,078	4,217,626	4,240,559	4,331,400	90,841	2%
Admissions	492,362	521,860	464,850	473,405	8,555	2%
NLTP	102,363	79,029	68,571	72,434	3,863	6%
OPC	12,682	14,866	16,209	12,000	(4,209)	-26%
CLE	648,062	570,370	644,823	570,000	(74,823)	-12%
Summer Convention	114,948	198,446	189,012	257,000	67,988	36%
Fall Forum	100,139	120,992	129,261	111,000	(18,261)	-14%
Spring Convention	123,943	132,270	164,213	147,200	(17,013)	-10%
Member Services	221,925	240,595	230,703	226,797	(3,906)	-2%
Public Services	20,674	22,656	15,534	17,336	1,803	12%
Bar Operations	68,729	70,279	85,259	85,569	311	0%
Facilities	312,896	274,410	257,979	257,979	-	0%
Total Revenue	6,294,800	6,463,398	6,506,973	6,562,121	55,148	1%
Expenses						
Licensing	142,172	101,761	101,420	115,000	13,580	13%
Admissions	475,183	467,018	474,021	490,503	16,482	3%
NLTP	67,588	85,883	87,190	78,012	(9,178)	-11%
OPC	1,207,634	1,275,793	1,340,480	1,388,388	47,908	4%
CLE	527,352	586,914	513,719	552,826	39,107	8%
Summer Convention	233,641	229,468	211,279	257,201	45,922	22%
Fall Forum	86,389	143,518	160,546	111,312	(49,233)	-31%
Spring Convention	102,215	97,146	119,783	129,439	9,656	8%
Member Services	622,056	595,804	647,775	657,319	9,544	1%
Public Services	422,908	440,977	462,951	471,410	8,460	2%
Bar Operations	1,360,756	1,459,882	1,558,845	1,627,665	68,820	4%
Facilities	530,330	528,309	524,293	548,267	23,974	5%
Total Expenses	5,778,224	6,012,475	6,202,300	6,427,343	225,043	4%
Other						
Gain (Loss) on Disposal of Assets	-	(1,704)	-	-	-	-
Net Profit (Loss)	\$ 516,576	\$ 449,219	\$ 304,673	\$ 134,778	\$ (169,895)	-56%
Depreciation	198,011	227,492	232,591	250,929	18,337	8%
Cash increase (decrease) from operations	714,587	676,711	537,264	385,707	(151,558)	-28%
Changes in operating assets/liabilities	17,066	106,168	15,000	20,000	5,000	33%
Capital expenditures	(224,115)	(103,078)	(167,715)	(131,924)	35,791	-21%
Net change in cash	\$ 507,538	\$ 679,801	\$ 384,549	\$ 273,783	\$ (110,767)	-29%

(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
Preliminary FY2018 Budget - Summary by Account
Based on Actual Results through 4/30/17

	Actual FY 2015	Actual FY 2016	Projected FY 2017	Draft Budget FY 2018	\$ Change 2016 Projected vs 2017 Budget	% Change 2016 Projected vs 2017 Budget
Revenue						
4001 · Admissions - Student Exam Fees	\$ 167,400	\$ 161,700	\$ 145,000	\$ 147,900	\$ 2,900	2%
4002 · Admissions - Attorney Exam Fees	68,800	75,745	64,150	65,433	1,283	2%
4003 · Admissions - Retake Fees	38,025	62,400	57,250	58,395	1,145	2%
4004 · Admissions - Laptop Fees	65,400	73,050	68,000	69,360	1,360	2%
4005 · Admissions - Application Forms	25	-	-	-	-	#DIV/0!
4006 · Transfer App Fees	34,500	19,300	2,000	2,040	40	2%
4008 · Attorney - Motion	69,000	67,700	75,300	76,806	1,506	2%
4009 · House Counsel	12,750	16,150	19,550	19,941	391	2%
4010 · Section/Local Bar Support fees	101,417	104,825	97,800	101,220	3,420	3%
4020 · NLTP Fees	102,450	79,800	71,700	73,134	1,434	2%
4021 · Lic Fees > 3 Years	3,299,930	3,404,815	3,470,000	3,556,750	86,750	2%
4022 · Lic Fees < 3 Years	279,290	284,210	246,000	252,150	6,150	2%
4023 · Lic Fees - House Counsel	20,700	23,970	28,885	29,607	722	2%
4025 · Pro Hac Vice Fees	70,250	75,500	69,250	70,981	1,731	3%
4026 · Lic Fees - Inactive/FS	109,280	107,150	111,800	114,595	2,795	2%
4027 · Lic Fees - Inactive/NS	181,915	199,495	209,810	215,055	5,245	2%
4029 · Prior Year Lic Fees	890	1,165	3,686	3,778	92	2%
4030 · Certs of Good Standing	25,995	23,590	23,970	24,569	599	2%
4039 · Room Rental-All parties	131,234	122,887	115,574	115,574	-	0%
4042 · Food & Beverage Rev-All Parties	154,514	128,413	118,222	118,222	-	0%
4043 · Setup & A/V charges-All parties	5,406	3,189	2,186	2,186	-	0%
4051 · Meeting - Registration	247,869	365,290	394,825	432,500	37,675	10%
4052 · Meeting - Sponsor Revenue	55,500	92,650	74,650	69,000	(5,650)	-8%
4053 · Meeting - Vendor Revenue	36,475	31,550	34,625	34,000	(625)	-2%
4054 · Meeting - Material Sales	275	15	-	-	-	#DIV/0!
4055 · Meeting - Sp Ev Registration	10,394	6,368	5,386	6,700	1,314	24%
4060 · E-Filing Revenue	22,981	20,609	12,952	13,211	259	2%
4061 · Advertising Revenue	130,162	141,648	134,573	134,573	-	0%
4062 · Subscriptions	240	150	60	61	1	2%
4063 · Modest Means revenue	15,970	15,945	12,750	13,000	250	2%
4071 · Mem Benefits - Lexis	3,095	2,715	833	-	(833)	-100%
4072 · Royalty Inc - Bar J, MBNA, LM,M	5,717	6,361	7,078	5,000	(2,078)	-29%
4081 · CLE - Registrations	494,596	466,849	504,799	450,000	(54,799)	-11%
4082 · CLE - Video Library Sales	143,725	69,529	110,057	105,000	(5,057)	-5%
4083 · CLE - Material Sales	560	-	-	-	-	#DIV/0!
4084 · Business Law Book Sales	-	12,825	10,026	-	(10,026)	-100%
4090 · Tenant Rent	21,672	19,866	21,672	21,672	-	0%
4093 · Law Day Revenue	5,145	6,380	3,593	5,163	1,570	44%
4095 · Miscellaneous Income	22,051	9,129	17,674	8,192	(9,482)	-54%
4096 · Late Fees	99,125	118,076	90,806	77,000	(13,806)	-15%
4103 · In - Kind Revenue - UDR	1,935	910	1,252	1,277	25	2%
4151 · ILM Realized Gains / Losses	68,076	48,495	59,928	59,928	-	0%
4152 · ILM Interest Income	(13,815)	10,005	15,746	15,746	-	0%
4153 · ILM Unrealized Gains / Losses	(25,789)	(11,831)	(7,330)	(7,330)	-	0%
4155 · General Interest Income	82	116	144	144	-	0%
4200 · Seminar Profit/Loss	9,588	(5,305)	740	(414)	(1,154)	-156%
Total Revenue	6,294,800	6,463,398	6,506,973	6,562,121	55,148	1%
Expenses						
Program Services						
5001 · Meeting Facility-external only	75,306	59,656	44,198	67,489	23,291	53%
5002 · Meeting facility-internal only	69,503	71,804	70,763	69,109	(1,654)	-2%
5013 · ExamSoft	19,735	22,095	23,145	24,000	855	4%
5014 · Questions	44,180	50,085	48,085	50,000	1,915	4%
5015 · Investigations	11,538	125	300	430	130	43%
5016 · Credit Checks	2,280	2,606	2,568	2,568	-	0%
5017 · Medical Exam	975	183	2,560	2,560	-	0%
5025 · Temp Labor/Proctors	5,050	6,100	6,600	6,600	-	0%
5030 · Speaker Fees & Expenses	31,568	42,255	48,399	43,100	(5,299)	-11%
5031 · Speaker Reimb. - Receipt Req'd	12,395	14,907	10,630	10,500	(130)	-1%
5035 · Awards	3,161	4,163	5,920	5,467	(453)	-8%
5037 · Grants/ contributions - general	5,100	20,721	7,350	9,500	2,150	29%

Utah State Bar
Preliminary FY2018 Budget - Summary by Account
Based on Actual Results through 4/30/17

	Actual FY 2015	Actual FY 2016	Projected FY 2017	Draft Budget FY 2018	\$ Change 2016 Projected vs 2017 Budget	% Change 2016 Projected vs 2017 Budget
5040 · Witness & Hearing Expense	1,656	7,443	14,369	9,700	(4,669)	-32%
5041 · Process Serving	1,126	2,380	1,364	1,200	(164)	-12%
5042 · Operations Audit	-	5,984	28,500	-	(28,500)	-100%
5045 · Bar Anniversary	-	16,026	251	-	(251)	-100%
5046 · Court Reporting	494	1,172	1,414	850	(564)	-40%
5047 · Casemaker	68,913	75,643	70,683	70,000	(683)	-1%
5055 · Legislative Expense	51,854	21,100	43,220	43,000	(220)	-1%
5060 · Program Special Activities	100	6,522	325	5,250	4,925	1515%
5061 · LRE - Bar Support	65,000	65,000	65,000	65,000	-	0%
5062 · Law Day	9,408	14,920	20,528	17,760	(2,768)	-13%
5063 · Special Event Expense	73,170	8,434	30,876	27,379	(3,498)	-11%
5064 · MCLE Fees Paid	39,566	40,866	42,246	38,000	(4,246)	-10%
5070 · Equipment Rental	40,703	41,666	61,990	37,342	(24,649)	-40%
5075 · Food & Bev-external costs only	445,577	524,457	483,772	491,714	7,943	2%
5076 · Food & beverage - internal only	82,712	72,968	71,758	70,450	(1,308)	-2%
5079 · Soft Drinks	13,695	12,925	11,038	11,038	-	0%
5085 · Misc. Program Expense	19,015	18,365	16,173	16,540	367	2%
5090 · Commission Expense	25,851	23,973	23,856	23,856	-	0%
5096 · UDR Support	10,000	-	10,000	-	(10,000)	-100%
5099 · Blomquist Hale	73,887	73,966	73,951	75,000	1,049	1%
5501 · Books Purchased-BFB	9,822	-	-	-	-	#DIV/0!
5702 · Lodging	-	-	-	-	-	#DIV/0!
5702 · Travel - Lodging	34,441	41,765	47,190	55,600	8,410	18%
5703 · Transportation	-	-	-	-	-	#DIV/0!
5703 · Travel - Transportation/Parking	23,145	15,768	24,097	24,902	805	3%
5704 · Travel - Mileage Reimbursement	18,785	15,335	9,674	10,865	1,190	12%
5705 · Travel - Per Diems	7,839	7,204	4,875	8,434	3,560	73%
5706 · Travel - Meals	623	901	843	1,209	366	43%
5707 · Travel - Commission Mtgs	25,021	38,250	45,359	46,000	641	1%
5805 · ABA Annual Meeting	16,984	9,974	11,173	21,602	10,429	93%
5810 · ABA Mid Year Meeting	10,556	13,834	13,494	18,081	4,587	34%
5815 · Commission/Education	600	10,377	24,400	26,000	1,600	7%
5820 · ABA Annual Delegate	8,675	8,541	14,106	11,000	(3,106)	-22%
5830 · Western States Bar Conference	17,086	7,460	23,353	11,550	(11,803)	-51%
5840 · President's Expense	11,753	21,784	19,495	18,000	(1,495)	-8%
5841 · President's Reimbursement	-	8,845	3,882	4,000	118	3%
5850 · Leadership Academy	-	6,598	21,500	20,000	(1,500)	-7%
5855 · Bar Review	-	1,765	330	1,500	1,170	355%
5865 · Retreat	12,311	30,561	26,080	26,000	(80)	0%
5960 · Overhead Allocation - Seminars	8,212	0	(0)	1,261	1,261	0%
5970 · Event Revenue Sharing - 3rd Pty	84,689	79,988	70,969	70,000	(969)	-1%
Total Program Services Expenses	1,594,061	1,647,461	1,702,652	1,671,405	(31,247)	-2%
Salaries & Benefits						
5510 · Salaries/Wages	2,379,546	2,525,936	2,598,833	2,765,974	167,141	6%
5605 · Payroll Taxes	174,667	183,842	189,691	201,503	11,811	6%
5610 · Health Insurance	188,129	229,870	243,052	254,671	11,619	5%
5630 · Dental Insurance	12,561	14,704	16,052	16,910	858	5%
5640 · Life & LTD Insurance	18,661	16,339	15,876	15,876	-	0%
5645 · Workman's Comp Insurance	6,210	3,524	2,949	2,949	-	0%
5650 · Retirement Plan Contributions	213,913	218,493	239,011	254,736	15,725	7%
5655 · Retirement Plan Fees & Costs	22,074	23,036	22,396	22,396	-	0%
5660 · Training/Development	7,527	9,927	26,200	19,519	(6,681)	-26%
Total Salaries/Benefit Expenses	3,023,289	3,225,670	3,354,059	3,554,534	200,474	6%
General & Administrative						
7025 · Office Supplies	25,155	25,164	23,750	23,887	138	1%
7033 · Operating Meeting Supplies	21,376	22,299	22,644	22,694	50	0%
7035 · Postage/Mailing, net	67,177	72,378	47,929	49,083	1,154	2%
7040 · Copy/Printing Expense	187,385	192,946	164,331	158,171	(6,160)	-4%
7041 · Copy/Print revenue	(24,010)	(27,630)	(26,036)	(26,036)	-	0%
7045 · Internet Service	16,242	6,822	15,414	15,469	55	0%
7050 · Computer Maintenance	13,991	12,028	25,900	65,135	39,235	151%

Utah State Bar
Preliminary FY2018 Budget - Summary by Account
Based on Actual Results through 4/30/17

	Actual FY 2015	Actual FY 2016	Projected FY 2017	Draft Budget FY 2018	\$ Change 2016 Projected vs 2017 Budget	% Change 2016 Projected vs 2017 Budget
7055 · Computer Supplies & Small Equip	23,697	14,072	8,372	8,351	(21)	0%
7089 · Membership Database Fees	97,858	31,094	34,652	33,646	(1,006)	-3%
7095 · Fax Equip & Supplies	-	970	-	-	-	#DIV/0!
7100 · Telephone	35,656	41,865	58,675	56,853	(1,822)	-3%
7105 · Advertising	705	1,332	20,738	20,650	(88)	0%
7106 · Public Notification	861	2,050	1,158	1,158	-	0%
7110 · Publications/Subscriptions	11,590	13,617	16,506	16,340	(166)	-1%
7115 · Public Relations	-	991	12,000	12,000	-	0%
7120 · Membership/Dues	11,673	12,334	11,181	11,096	(85)	-1%
7135 · Bank Service Charges	1,811	2,291	1,662	1,662	-	0%
7136 · ILM Service Charges	12,444	13,694	15,009	15,009	-	0%
7138 · Bad debt expense	3	1,891	1,891	1,891	-	0%
7140 · Credit Card Merchant Fees	89,566	102,475	97,438	96,958	(480)	0%
7140 · Credit Card Merchant Fees - Other	-	-	-	-	-	#DIV/0!
7141 · Credit Card surcharge	(25,692)	(57,314)	(51,298)	(51,298)	-	0%
7145 · Commission Election Expense	1,625	3,250	3,250	3,500	250	8%
7150 · E&O/Off & Dir Insurance	46,584	39,839	47,637	48,577	940	2%
7160 · Audit Expense	32,253	30,504	29,539	30,000	461	2%
7170 · Lobbying Rebates	692	746	14	14	-	0%
7175 · O/S Consultants	26,392	50,923	23,023	21,200	(1,823)	-8%
7176 · Bar Litigation	13,117	19,207	19,169	15,244	(3,925)	-20%
7177 · UPL	2,548	2,750	10,377	10,000	(377)	-4%
7178 · Offsite Storage/Backup	3,084	3,688	3,959	4,000	41	1%
7179 · Payroll Adm Fees	2,881	2,810	2,811	2,811	-	0%
7180 · Administrative Fee Expense	1,510	1,445	952	952	-	0%
7190 · Lease Interest Expense	1,051	647	185	185	-	0%
7191 · Lease Sales Tax Expense	282	592	704	704	-	0%
7195 · Other Gen & Adm Expense	8,976	7,356	7,688	7,099	(589)	-8%
Total General & Administrative Expenses	708,483	649,126	651,222	677,004	25,783	4%
In Kind Expenses						
7103 · InKind Contrib-UDR & all other	34,326	29,671	25,030	25,030	-	0%
Building Overhead						
6015 · Janitorial Expense	31,244	29,599	30,293	31,785	1,493	5%
6020 · Heat	23,844	17,416	17,092	17,934	842	5%
6025 · Electricity	49,472	47,619	47,849	50,207	2,358	5%
6030 · Water/Sewer	4,438	4,320	4,951	5,195	244	5%
6035 · Outside Maintenance	20,498	12,735	12,436	13,049	613	5%
6040 · Building Repairs	5,585	14,339	25,938	27,216	1,278	5%
6045 · Bldg Mtnce Contracts	38,832	40,681	36,400	38,193	1,794	5%
6050 · Bldg Mtnce Supplies	2,520	2,254	2,936	3,080	145	5%
6055 · Real Property Taxes	29,796	38,593	40,569	42,597	2,028	5%
6060 · Personal Property Taxes	720	718	760	798	38	5%
6065 · Bldg Insurance/Fees	13,105	24,781	17,522	18,386	863	5%
6070 · Building & Improvements Depre	55,646	52,608	52,522	56,663	4,141	8%
6075 · Furniture & Fixtures Depre	15,397	15,402	15,325	16,533	1,208	8%
7065 · Computers, Equip & Sftwre Depr	126,968	159,482	164,745	177,733	12,988	8%
Total Building Overhead Expenses	418,066	460,547	469,337	499,370	30,033	6%
Total Expenses	5,778,224	6,012,475	6,202,300	6,427,343	225,043	4%
Other Income/Expense						
4300 · Gain (Loss) - Sales of Assets	-	(1,704)	-	-	-	#DIV/0!
Net Profit (Loss)	\$ 516,576	\$ 449,219	\$ 304,673	\$ 134,778	\$ (169,895)	-56%

Utah State Bar
Preliminary FY2018 Budget
Based on Actual Results through 4/30/17
01 - Licensing

	Actual FY 2015	Actual FY 2016	Projected FY 2017	Draft Budget FY 2018	\$ Change 2016 Projected vs 2017 Budget	% Change 2016 Projected vs 2017 Budget
Revenue						
4010 · Section/Local Bar Support fees	\$ 23,085	\$ 21,602	\$ 16,800	\$ 17,220	\$ 420	3%
4021 · Lic Fees > 3 Years	3,299,930	3,404,815	3,470,000	3,556,750	86,750	2%
4022 · Lic Fees < 3 Years	279,290	284,210	246,000	252,150	6,150	2%
4023 · Lic Fees - House Counsel	20,700	23,970	28,885	29,607	722	2%
4025 · Pro Hac Vice Fees	70,250	75,500	69,250	70,981	1,731	3%
4026 · Lic Fees - Inactive/FS	109,280	107,150	111,800	114,595	2,795	2%
4027 · Lic Fees - Inactive/NS	181,915	199,495	209,810	215,055	5,245	2%
4029 · Prior Year Lic Fees	890	1,165	3,686	3,778	92	2%
4030 · Certs of Good Standing	25,995	23,590	23,970	24,569	599	2%
4095 · Miscellaneous Income	1,018	1,703	1,652	1,694	41	2%
4096 · Late Fees	63,725	74,426	58,706	45,000	(13,706)	-23%
Total Revenue	4,076,078	4,217,626	4,240,559	4,331,400	90,841	2%
Expenses						
Salaries & Benefits						
5510 · Salaries/Wages	54,374	43,720	36,246	48,058	11,812	33%
5605 · Payroll Taxes	4,005	2,937	2,845	3,987	1,142	40%
5610 · Health Insurance	5,729	5,841	5,870	4,939	(930)	-16%
5630 · Dental Insurance	363	367	441	456	14	3%
5640 · Life & LTD Insurance	623	467	571	571	-	0%
5650 · Retirement Plan Contributions	5,358	3,548	2,943	4,090	1,147	39%
5655 · Retirement Plan Fees & Costs	867	391	712	712	-	0%
5660 · Training/Development	-	-	625	625	-	0%
Total Salaries/Benefit Expenses	71,320	57,272	50,253	63,438	13,186	26%
General & Administrative						
7025 · Office Supplies	987	1,276	1,684	1,684	-	0%
7035 · Postage/Mailing, net	13,346	9,833	8,855	8,855	-	0%
7040 · Copy/Printing Expense	3,087	16,905	10,222	10,222	-	0%
7050 · Computer Maintenance	1,097	792	1,654	1,654	-	0%
7055 · Computer Supplies & Small Equip	350	230	230	230	-	0%
7089 · Membership Database Fees	24,844	4,355	7,124	7,124	-	0%
7100 · Telephone	1,210	1,820	2,618	2,618	-	0%
7120 · Membership/Dues	-	-	70	70	-	0%
7140 · Credit Card Merchant Fees	45,520	59,991	64,047	64,047	-	0%
7140 · Credit Card Merchant Fees - Other	-	-	-	-	-	#DIV/0!
7141 · Credit Card surcharge	(25,692)	(57,314)	(51,298)	(51,298)	-	0%
7170 · Lobbying Rebates	692	746	14	14	-	0%
Total General & Administrative Expenses	65,442	38,634	45,218	45,218	-	0%
Building Overhead						
6015 · Janitorial Expense	437	411	421	442	21	5%
6020 · Heat	333	242	238	249	12	5%
6025 · Electricity	691	662	665	698	33	5%
6030 · Water/Sewer	62	60	69	72	3	5%
6035 · Outside Maintenance	287	177	173	181	9	5%
6040 · Building Repairs	72	199	361	379	18	5%
6045 · Bldg Mtncn Contracts	542	565	506	531	25	5%
6050 · Bldg Mtncn Supplies	35	31	41	43	2	5%
6065 · Bldg Insurance/Fees	183	344	243	255	12	5%
6070 · Building & Improvements Depre	778	731	730	788	58	8%
6075 · Furniture & Fixtures Depre	215	214	213	230	17	8%
7065 · Computers, Equip & Sftwre Depre	1,773	2,217	2,290	2,473	183	8%
Total Building Overhead Expenses	5,410	5,855	5,949	6,343	394	7%
Total Expenses	142,172	101,761	101,420	115,000	13,580	13%
Net Profit (Loss)	\$ 3,933,906	\$ 4,115,865	\$ 4,139,139	\$ 4,216,400	\$ 77,261	2%

Utah State Bar
Preliminary FY2018 Budget
Based on Actual Results through 4/30/17
02 - Admissions

	Actual FY 2015	Actual FY 2016	Projected FY 2017	Draft Budget FY 2018	\$ Change 2016 Projected vs 2017 Budget	% Change 2016 Projected vs 2017 Budget
Revenue						
4001 · Admissions - Student Exam Fees	\$ 167,400	\$ 161,700	\$ 145,000	\$ 147,900	\$ 2,900	2%
4002 · Admissions - Attorney Exam Fees	68,800	75,745	64,150	65,433	1,283	2%
4003 · Admissions - Retake Fees	38,025	62,400	57,250	58,395	1,145	2%
4004 · Admissions - Laptop Fees	65,400	73,050	68,000	69,360	1,360	2%
4005 · Admissions - Application Forms	25	-	-	-	-	#DIV/0!
4006 · Transfer App Fees	34,500	19,300	2,000	2,040	40	2%
4008 · Attorney - Motion	69,000	67,700	75,300	76,806	1,506	2%
4009 · House Counsel	12,750	16,150	19,550	19,941	391	2%
4095 · Miscellaneous Income	1,265	2,165	1,500	1,530	30	2%
4096 · Late Fees	35,400	43,650	32,100	32,000	(100)	0%
4200 · Seminar Profit/Loss	(203)	-	-	-	-	#DIV/0!
Total Revenue	492,362	521,860	464,850	473,405	8,555	2%
Expenses						
Program Services						
5001 · Meeting Facility-external only	20,056	13,641	16,169	16,000	(169)	-1%
5002 · Meeting facility-internal only	6,775	8,251	7,278	7,000	(278)	-4%
5013 · ExamSoft	19,735	22,095	23,145	24,000	855	4%
5014 · Questions	44,180	50,085	48,085	50,000	1,915	4%
5015 · Investigations	11,527	96	230	230	-	0%
5016 · Credit Checks	2,280	2,606	2,568	2,568	-	0%
5017 · Medical Exam	975	183	2,560	2,560	-	0%
5025 · Temp Labor/Proctors	5,050	6,100	6,600	6,600	-	0%
5046 · Court Reporting	494	325	-	-	-	#DIV/0!
5070 · Equipment Rental	1,377	4,240	7,422	7,422	-	0%
5075 · Food & Bev-external costs only	8,502	4,548	6,891	6,891	-	0%
5076 · Food & beverage - internal only	8,918	9,217	9,085	8,000	(1,085)	-12%
5085 · Misc. Program Expense	12	56	35	35	-	0%
5702 · Travel - Lodging	2,086	423	1,343	4,200	2,857	213%
5703 · Travel - Transportation/Parking	1,790	2,228	1,042	2,550	1,508	145%
5704 · Travel - Mileage Reimbursement	92	181	-	-	-	#DIV/0!
5705 · Travel - Per Diems	1,035	1,103	512	1,500	988	193%
Total Program Services Expenses	134,885	125,378	132,967	139,557	6,590	5%
Salaries & Benefits						
5510 · Salaries/Wages	225,749	229,084	228,407	239,828	11,420	5%
5605 · Payroll Taxes	16,822	17,549	17,701	18,586	885	5%
5610 · Health Insurance	17,188	18,972	20,434	20,248	(186)	-1%
5630 · Dental Insurance	1,089	1,216	1,367	1,367	(0)	0%
5640 · Life & LTD Insurance	1,676	1,604	1,573	1,573	-	0%
5650 · Retirement Plan Contributions	21,234	22,448	23,153	24,311	1,158	5%
5655 · Retirement Plan Fees & Costs	2,269	2,409	2,137	2,137	-	0%
5660 · Training/Development	15	299	1,349	600	(749)	-56%
Total Salaries/Benefit Expenses	286,043	293,581	296,122	308,650	12,528	4%
General & Administrative						
7025 · Office Supplies	1,762	1,665	1,550	1,500	(50)	-3%
7035 · Postage/Mailing, net	2,679	2,425	1,770	1,800	30	2%
7040 · Copy/Printing Expense	6,288	5,150	4,705	4,000	(705)	-15%
7045 · Internet Service	-	40	-	-	-	#DIV/0!
7050 · Computer Maintenance	-	235	2,589	2,600	11	0%
7055 · Computer Supplies & Small Equip	236	347	321	300	(21)	-6%
7089 · Membership Database Fees	16,078	3,900	3,900	3,180	(720)	-18%
7100 · Telephone	1,815	2,722	3,916	2,500	(1,416)	-36%
7110 · Publications/Subscriptions	120	181	1,166	1,000	(166)	-14%
7120 · Membership/Dues	215	865	885	800	(85)	-10%
7140 · Credit Card Merchant Fees	11,763	16,861	10,222	10,000	(222)	-2%
7150 · E&O/Off & Dir Insurance	3,979	3,684	3,765	3,800	35	1%
7175 · O/S Consultants	145	-	-	-	-	#DIV/0!
Total General & Administrative Expenses	45,081	38,076	34,789	31,480	(3,309)	-10%

Utah State Bar
Preliminary FY2018 Budget
Based on Actual Results through 4/30/17
02 - Admissions

	Actual FY 2015	Actual FY 2016	Projected FY 2017	Draft Budget FY 2018	\$ Change 2016 Projected vs 2017 Budget	% Change 2016 Projected vs 2017 Budget
Building Overhead						
6015 - Janitorial Expense	741	702	718	754	36	5%
6020 - Heat	565	413	405	425	20	5%
6025 - Electricity	1,172	1,129	1,134	1,191	57	5%
6030 - Water/Sewer	105	102	117	123	6	5%
6035 - Outside Maintenance	486	302	295	309	15	5%
6040 - Building Repairs	122	340	615	645	31	5%
6045 - Bldg Mtncn Contracts	920	964	863	906	43	5%
6050 - Bldg Mtncn Supplies	60	53	70	73	3	5%
6065 - Bldg Insurance/Fees	311	587	415	436	21	5%
6070 - Building & Improvements Depr	1,319	1,247	1,245	1,344	100	8%
6075 - Furniture & Fixtures Depr	365	365	363	392	29	8%
7065 - Computers, Equip & Sftwre Depr	3,009	3,780	3,904	4,217	312	8%
Total Building Overhead Expenses	9,175	9,983	10,144	10,816	673	7%
Total Expenses	475,183	467,018	474,021	490,503	16,482	3%
Net Profit (Loss)	\$ 17,179	\$ 54,842	\$ (9,171)	\$ (17,098)	\$ (7,927)	86%

Utah State Bar
Preliminary FY2018 Budget
Based on Actual Results through 4/30/17
03 - NLTP

	Actual FY 2015	Actual FY 2016	Projected FY 2017	Draft Budget FY 2018	\$ Change 2016 Projected vs 2017 Budget	% Change 2016 Projected vs 2017 Budget
Revenue						
4020 · NLTP Fees	102,450	79,800	71,700	73,134	1,434	2%
4200 · Seminar Profit/Loss	(87)	(771)	(3,129)	(700)	2,429	-78%
Total Revenue	102,363	79,029	68,571	72,434	3,863	6%
Expenses						
Program Services						
5002 · Meeting facility-internal only	2,038	1,383	1,665	1,665	-	0%
5075 · Food & Bev-external costs only	1,493	1,468	29	300	271	931%
5076 · Food & beverage - internal only	3,069	2,146	3,404	2,500	(904)	-27%
5079 · Soft Drinks	144	-	-	-	-	#DIV/0!
5085 · Misc. Program Expense	51	23	-	-	-	#DIV/0!
5702 · Travel - Lodging	62	2,075	1,458	1,600	142	10%
5703 · Travel - Transportation/Parking	160	966	-	1,285	1,285	#DIV/0!
5704 · Travel - Mileage Reimbursement	383	1,186	414	634	220	53%
5705 · Travel - Per Diems	-	140	34	685	651	1915%
5706 · Travel - Meals	-	466	-	-	-	#DIV/0!
Total Program Services Expenses	7,400	9,852	7,005	8,669	1,664	24%
Salaries & Benefits						
5510 · Salaries/Wages	40,320	48,228	50,203	42,713	(7,490)	-15%
5605 · Payroll Taxes	3,527	3,710	4,007	3,207	(800)	-20%
5610 · Health Insurance	5,260	6,324	5,750	4,637	(1,113)	-19%
5630 · Dental Insurance	303	405	441	456	14	3%
5640 · Life & LTD Insurance	430	413	399	399	-	0%
5650 · Retirement Plan Contributions	361	4,177	4,929	4,175	(754)	-15%
5655 · Retirement Plan Fees & Costs	-	607	712	712	-	0%
5660 · Training/Development	30	935	1,254	960	(294)	-23%
Total Salaries/Benefit Expenses	50,230	64,799	67,694	57,259	(10,435)	-15%
General & Administrative						
7025 · Office Supplies	95	364	22	22	-	0%
7035 · Postage/Mailing, net	82	143	192	192	-	0%
7040 · Copy/Printing Expense	2,112	1,614	1,607	1,200	(407)	-25%
7050 · Computer Maintenance	-	78	936	936	-	0%
7100 · Telephone	660	1,032	1,200	1,200	-	0%
7120 · Membership/Dues	571	-	542	542	-	0%
7140 · Credit Card Merchant Fees	826	1,894	1,760	1,760	-	0%
Total General & Administrative Expenses	4,345	5,124	6,285	5,878	(407)	-6%
Building Overhead						
6015 · Janitorial Expense	453	429	439	439	-	0%
6020 · Heat	346	253	248	248	-	0%
6025 · Electricity	717	690	694	694	-	0%
6030 · Water/Sewer	64	63	72	72	-	0%
6035 · Outside Maintenance	297	185	180	180	-	0%
6040 · Building Repairs	75	208	376	376	-	0%
6045 · Bldg Mtncn Contracts	563	590	528	528	-	0%
6050 · Bldg Mtncn Supplies	37	33	43	43	-	0%
6065 · Bldg Insurance/Fees	190	359	254	254	-	0%
6070 · Building & Improvements Depre	807	763	762	762	-	0%
6075 · Furniture & Fixtures Depre	223	223	222	222	-	0%
7065 · Computers, Equip & Sftwre Depre	1,841	2,312	2,389	2,389	-	0%
Total Building Overhead Expenses	5,613	6,108	6,206	6,206	-	0%
Total Expenses	67,588	85,883	87,190	78,012	(9,178)	-11%
Net Profit (Loss)	\$ 34,776	\$ (6,855)	\$ (18,619)	\$ (5,578)	\$ 13,040	-70%

Utah State Bar
Preliminary FY2018 Budget
Based on Actual Results through 4/30/17
04 - Bar Management

	Actual FY 2015	Actual FY 2016	Projected FY 2017	Draft Budget FY 2018	\$ Change 2016 Projected vs 2017 Budget	% Change 2016 Projected vs 2017 Budget
Revenue						
4060 · E-Filing Revenue	22,981	20,609	12,952	13,211	259	2%
4095 · Miscellaneous Income	1,353	1,921	2,543	2,593	51	2%
4103 · In - Kind Revenue - UDR	1,935	910	1,252	1,277	25	2%
4151 · ILM Realized Gains / Losses	68,076	48,495	59,928	59,928	-	0%
4152 · ILM Interest Income	(13,815)	10,005	15,746	15,746	-	0%
4153 · ILM Unrealized Gains / Losses	(25,789)	(11,831)	(7,330)	(7,330)	-	0%
4155 · General Interest Income	82	116	144	144	-	0%
Total Revenue	54,824	70,224	85,234	85,569	335	0%
Expenses						
Program Services						
5002 · Meeting facility-internal only	1,050	1,663	2,000	2,000	-	0%
5055 · Legislative Expense	-	-	220	-	(220)	-100%
5063 · Special Event Expense	237	838	2,379	2,379	-	0%
5070 · Equipment Rental	-	22	22	22	-	0%
5075 · Food & Bev-external costs only	2,527	3,385	3,671	3,671	-	0%
5076 · Food & beverage - internal only	-	987	1,042	1,042	-	0%
5079 · Soft Drinks	3,488	2,735	2,776	2,776	-	0%
5085 · Misc. Program Expense	496	96	1,200	1,200	-	0%
5702 · Travel - Lodging	-	1,667	4,112	4,112	-	0%
5703 · Travel - Transportation/Parking	1,934	1,597	823	823	-	0%
5704 · Travel - Mileage Reimbursement	45	547	511	511	-	0%
5705 · Travel - Per Diems	145	365	381	381	-	0%
5706 · Travel - Meals	-	-	415	415	-	0%
5805 · ABA Annual Meeting	2,486	1,954	1,954	5,800	3,846	197%
5810 · ABA Mid Year Meeting	302	1,893	-	-	-	#DIV/0!
5815 · Commission/Education	-	425	-	-	-	#DIV/0!
5830 · Western States Bar Conference	3,803	4,675	11,353	6,050	(5,303)	-47%
5960 · Overhead Allocation - Seminars	-	(5,697)	(25,760)	(20,000)	5,760	-22%
Total Program Services Expenses	16,511	17,153	7,100	11,182	4,082	57%
Salaries & Benefits						
5510 · Salaries/Wages	460,320	499,138	517,929	543,826	25,896	5%
5605 · Payroll Taxes	30,708	34,425	34,741	36,478	1,737	5%
5610 · Health Insurance	26,773	31,498	35,292	43,420	8,128	23%
5630 · Dental Insurance	2,545	2,142	2,334	1,594	(740)	-32%
5640 · Life & LTD Insurance	3,528	1,418	1,432	1,432	-	0%
5645 · Workman's Comp Insurance	6,210	3,524	2,848	2,848	-	0%
5650 · Retirement Plan Contributions	43,894	44,538	45,556	47,834	2,278	5%
5655 · Retirement Plan Fees & Costs	7,148	4,661	3,183	3,183	-	0%
5660 · Training/Development	-	1,350	2,212	2,000	(212)	-10%
Total Salaries/Benefit Expenses	581,126	622,693	645,527	682,615	37,087	6%
General & Administrative						
7025 · Office Supplies	5,171	11,350	9,962	9,962	-	0%
7035 · Postage/Mailing, net	1,149	1,085	1,070	1,070	-	0%
7040 · Copy/Printing Expense	6,996	3,175	5,138	5,138	-	0%
7050 · Computer Maintenance	-	392	4,315	4,315	-	0%
7055 · Computer Supplies & Small Equip	3,707	2,397	654	654	-	0%
7089 · Membership Database Fees	-	2,262	-	-	-	#DIV/0!
7100 · Telephone	4,991	3,935	4,476	4,476	-	0%
7105 · Advertising	-	594	-	-	-	#DIV/0!
7120 · Membership/Dues	4,753	3,749	2,638	2,638	-	0%
7135 · Bank Service Charges	1,811	2,252	1,662	1,662	-	0%
7136 · ILM Service Charges	12,444	13,694	15,009	15,009	-	0%
7138 · Bad debt expense	-	1	1	1	-	0%
7140 · Credit Card Merchant Fees	8,225	664	(1,573)	(1,573)	-	0%
7150 · E&O/Off & Dir Insurance	3,979	3,684	7,762	8,150	388	5%
7160 · Audit Expense	32,253	30,504	29,539	30,000	461	2%
7175 · O/S Consultants	22,812	31,195	5,623	10,000	4,377	78%
7179 · Payroll Adm Fees	2,881	2,810	2,811	2,811	-	0%

Utah State Bar
Preliminary FY2018 Budget
Based on Actual Results through 4/30/17
04 - Bar Management

	Actual FY 2015	Actual FY 2016	Projected FY 2017	Draft Budget FY 2018	\$ Change 2016 Projected vs 2017 Budget	% Change 2016 Projected vs 2017 Budget
7180 - Administrative Fee Expense	1,510	1,445	952	952	-	0%
7195 - Other Gen & Adm Expense	5,750	5,117	5,819	5,000	(819)	-14%
Total General & Administrative Expenses	118,431	120,305	95,859	100,265	4,407	5%
In Kind Expenses						
7103 - InKind Contrib-UDR & all other	1,935	4,661	5,000	5,000	-	0%
Building Overhead						
6015 - Janitorial Expense	1,971	1,708	1,748	1,835	87	5%
6020 - Heat	1,513	1,005	986	1,036	49	5%
6025 - Electricity	3,121	2,748	2,761	2,899	138	5%
6030 - Water/Sewer	279	249	286	300	14	5%
6035 - Outside Maintenance	1,312	735	718	753	36	5%
6040 - Building Repairs	327	827	1,497	1,571	75	5%
6045 - Bldg Mtncn Contracts	2,434	2,347	2,100	2,205	105	5%
6050 - Bldg Mtncn Supplies	160	130	169	178	8	5%
6065 - Bldg Insurance/Fees	827	1,430	1,011	1,062	51	5%
6070 - Building & Improvements Depr	3,511	3,036	3,031	3,273	242	8%
6075 - Furniture & Fixtures Depr	970	889	884	955	71	8%
7065 - Computers, Equip & Sftwre Depr	7,943	9,202	9,506	10,266	760	8%
Total Building Overhead Expenses	24,370	24,305	24,696	26,334	1,637	7%
Total Expenses	742,372	789,118	778,182	825,396	47,214	6%
Other Income/Expense						
4300 - Gain (Loss) - Sales of Assets	-	(1,704)	-	-	-	#DIV/0!
Net Profit (Loss)	\$ (687,549)	\$ (720,598)	\$ (692,948)	\$ (739,827)	\$ (46,879)	7%

Utah State Bar
Preliminary FY2018 Budget
Based on Actual Results through 4/30/17
05 - Property Management

	Actual FY 2015	Actual FY 2016	Projected FY 2017	Draft Budget FY 2018	\$ Change 2016 Projected vs 2017 Budget	% Change 2016 Projected vs 2017 Budget
Revenue						
4039 · Room Rental-All parties	131,234	122,887	115,574	115,574	-	0%
4042 · Food & Beverage Rev-All Parties	154,514	128,413	118,222	118,222	-	0%
4043 · Setup & A/V charges-All parties	5,406	3,189	2,186	2,186	-	0%
4090 · Tenant Rent	21,672	19,866	21,672	21,672	-	0%
4095 · Miscellaneous Income	70	54	325	325	-	0%
Total Revenue	312,896	274,410	257,979	257,979	-	0%
Expenses						
Program Services						
5070 · Equipment Rental	4,597	3,020	2,186	2,186	-	0%
5075 · Food & Bev-external costs only	141,394	113,038	105,448	105,448	-	0%
5079 · Soft Drinks	8,807	10,189	8,225	8,225	-	0%
Total Program Services Expenses	154,797	126,247	115,858	115,858	-	0%
Salaries & Benefits						
5510 · Salaries/Wages	92,058	105,730	113,091	118,745	5,655	5%
5605 · Payroll Taxes	7,906	8,012	8,883	9,327	444	5%
5610 · Health Insurance	10,519	12,648	14,389	16,556	2,167	15%
5630 · Dental Insurance	666	811	882	911	29	3%
5640 · Life & LTD Insurance	726	736	703	703	-	0%
5650 · Retirement Plan Contributions	7,610	7,826	9,978	10,477	499	5%
5655 · Retirement Plan Fees & Costs	685	1,325	1,425	1,425	-	0%
5660 · Training/Development	-	-	950	950	-	0%
Total Salaries/Benefit Expenses	120,169	137,087	150,301	159,095	8,794	6%
General & Administrative						
7025 · Office Supplies	3,984	1,088	1,208	1,208	-	0%
7033 · Operating Meeting Supplies	21,376	22,235	22,536	22,536	-	0%
7035 · Postage/Mailing, net	3,609	5,223	(4,562)	(4,562)	-	0%
7040 · Copy/Printing Expense	2,423	3,837	3,829	3,829	-	0%
7041 · Copy/Print revenue	(24,010)	(27,630)	(26,036)	(26,036)	-	0%
7055 · Computer Supplies & Small Equip	173	66	-	-	-	#DIV/0!
7100 · Telephone	3,583	5,116	7,194	7,194	-	0%
7140 · Credit Card Merchant Fees	21	6	26	26	-	0%
7190 · Lease Interest Expense	1,051	647	185	185	-	0%
7191 · Lease Sales Tax Expense	282	592	704	704	-	0%
Total General & Administrative Expenses	12,931	11,180	5,085	5,085	-	0%
In Kind Expenses						
7103 · InKind Contrib-UDR & all other	32,391	25,010	20,030	20,030	-	0%
Building Overhead						
6015 · Janitorial Expense	15,972	14,971	15,322	16,088	766	5%
6020 · Heat	12,198	8,809	8,645	9,077	432	5%
6025 · Electricity	25,289	24,086	24,202	25,412	1,210	5%
6030 · Water/Sewer	2,268	2,185	2,504	2,630	125	5%
6035 · Outside Maintenance	10,497	6,441	6,290	6,605	315	5%
6040 · Building Repairs	2,634	7,253	13,119	13,775	656	5%
6045 · Bldg Mtncce Contracts	19,835	20,576	18,411	19,332	921	5%
6050 · Bldg Mtncce Supplies	1,289	1,140	1,485	1,559	74	5%
6055 · Real Property Taxes	11,918	15,437	16,227	17,039	811	5%
6060 · Personal Property Taxes	288	287	304	319	15	5%
6065 · Bldg Insurance/Fees	6,699	12,534	8,863	9,306	443	5%
6070 · Building & Improvements Depre	28,446	26,609	26,565	28,691	2,125	8%
6075 · Furniture & Fixtures Depre	7,870	7,790	7,751	8,371	620	8%
7065 · Computers, Equip & Sftwre Depr	64,837	80,666	83,328	89,994	6,666	8%
Total Building Overhead Expenses	210,042	228,785	233,018	248,198	15,180	7%
Total Expenses	530,330	528,309	524,293	548,267	23,974	5%
Net Profit (Loss)	\$ (217,435)	\$ (253,900)	\$ (266,313)	\$ (290,287)	\$ (23,974)	9%

Utah State Bar
Preliminary FY2018 Budget
Based on Actual Results through 4/30/17
06 - Office of Prof Conduct

	Actual FY 2015	Actual FY 2016	Projected FY 2017	Draft Budget FY 2018	\$ Change 2016 Projected vs 2017 Budget	% Change 2016 Projected vs 2017 Budget
Revenue						
4095 · Miscellaneous Income	1,412	3,182	2,530	2,000	(530)	-21%
4200 · Seminar Profit/Loss	11,270	11,685	13,679	10,000	(3,679)	-27%
Total Revenue	12,682	14,866	16,209	12,000	(4,209)	-26%
Expenses						
Program Services						
5002 · Meeting facility-internal only	3,885	3,775	890	1,000	110	12%
5015 · Investigations	12	-	-	-	-	#DIV/0!
5040 · Witness & Hearing Expense	1,656	7,187	14,638	10,000	(4,638)	-32%
5041 · Process Serving	1,126	2,380	1,364	1,200	(164)	-12%
5046 · Court Reporting	-	847	1,414	850	(564)	-40%
5070 · Equipment Rental	160	-	-	-	-	#DIV/0!
5075 · Food & Bev-external costs only	243	-	-	-	-	#DIV/0!
5076 · Food & beverage - internal only	4,343	1,903	212	500	288	136%
5702 · Travel - Lodging	6,172	2,501	6,475	3,684	(2,791)	-43%
5703 · Travel - Transportation/Parking	4,138	1,683	2,711	732	(1,979)	-73%
5704 · Travel - Mileage Reimbursement	2,391	3,070	1,144	1,916	772	67%
5705 · Travel - Per Diems	2,617	1,897	1,160	1,278	119	10%
5805 · ABA Annual Meeting	3,884	-	-	5,342	5,342	#DIV/0!
5810 · ABA Mid Year Meeting	-	2,292	1,837	5,580	3,743	204%
Total Program Services Expenses	30,627	27,535	31,882	32,119	237	1%
Salaries & Benefits						
5510 · Salaries/Wages	779,638	837,575	870,949	914,496	43,547	5%
5605 · Payroll Taxes	57,303	61,827	64,145	67,353	3,207	5%
5610 · Health Insurance	67,207	80,148	83,105	77,112	(5,993)	-7%
5630 · Dental Insurance	4,417	5,437	5,881	6,661	780	13%
5640 · Life & LTD Insurance	6,541	6,137	5,821	5,821	-	0%
5650 · Retirement Plan Contributions	68,743	74,330	86,343	90,660	4,317	5%
5655 · Retirement Plan Fees & Costs	7,423	7,248	6,946	6,946	-	0%
5660 · Training/Development	3,877	2,746	8,651	3,850	(4,801)	-55%
Total Salaries/Benefit Expenses	995,150	1,075,447	1,131,841	1,172,899	41,058	4%
General & Administrative						
7025 · Office Supplies	10,608	6,129	4,720	4,720	-	0%
7035 · Postage/Mailing, net	6,059	7,515	6,068	6,068	-	0%
7040 · Copy/Printing Expense	18,182	20,183	16,707	16,707	-	0%
7045 · Internet Service	-	294	-	-	-	#DIV/0!
7050 · Computer Maintenance	-	235	2,589	2,589	-	0%
7055 · Computer Supplies & Small Equip	3,866	965	162	162	-	0%
7089 · Membership Database Fees	24,355	6,781	6,848	6,848	-	0%
7100 · Telephone	7,322	10,906	15,673	15,673	-	0%
7105 · Advertising	75	75	75	75	-	0%
7106 · Public Notification	861	2,050	998	998	-	0%
7110 · Publications/Subscriptions	9,223	9,171	11,118	11,118	-	0%
7120 · Membership/Dues	3,915	4,091	4,430	4,430	-	0%
7150 · E&O/Off & Dir Insurance	13,078	12,944	13,211	13,871	661	5%
7176 · Bar Litigation	-	-	244	244	-	0%
7178 · Offsite Storage/Backup	3,084	3,688	3,959	4,000	41	1%
7195 · Other Gen & Adm Expense	157	39	800	800	-	0%
Total General & Administrative Expenses	100,785	85,068	87,603	88,304	701	1%
Building Overhead						
6015 · Janitorial Expense	6,508	6,166	6,310	6,625	315	5%
6020 · Heat	4,967	3,628	3,560	3,738	178	5%
6025 · Electricity	10,305	9,919	9,967	10,465	498	5%
6030 · Water/Sewer	924	900	1,031	1,083	52	5%
6035 · Outside Maintenance	4,270	2,653	2,590	2,720	130	5%
6040 · Building Repairs	1,509	2,987	5,403	5,673	270	5%
6045 · Bldg Mtncn Contracts	8,089	8,474	7,582	7,961	379	5%
6050 · Bldg Mtncn Supplies	525	469	612	642	31	5%

Utah State Bar
Preliminary FY2018 Budget
Based on Actual Results through 4/30/17
06 - Office of Prof Conduct

	Actual FY 2015	Actual FY 2016	Projected FY 2017	Draft Budget FY 2018	\$ Change 2016 Projected vs 2017 Budget	% Change 2016 Projected vs 2017 Budget
6065 · Bldg Insurance/Fees	2,730	5,162	3,650	3,832	182	5%
6070 · Building & Improvements Depre	11,591	10,958	10,940	11,816	875	8%
6075 · Furniture & Fixtures Depre	3,207	3,208	3,192	3,447	255	8%
7065 · Computers, Equip & Sftwre Depr	26,447	33,220	34,316	37,062	2,745	8%
Total Building Overhead Expenses	81,072	87,743	89,154	95,065	5,911	7%
Total Expenses	1,207,634	1,275,793	1,340,480	1,388,388	47,908	4%
Net Profit (Loss)	\$ (1,194,952)	\$ (1,260,927)	\$ (1,324,271)	\$ (1,376,388)	\$ (52,117)	4%

Utah State Bar
Preliminary FY2018 Budget
Based on Actual Results through 4/30/17
07 - General Counsel

	Actual FY 2015	Actual FY 2016	Projected FY 2017	Draft Budget FY 2018	\$ Change 2016 Projected vs 2017 Budget	% Change 2016 Projected vs 2017 Budget
Expenses						
Program Services						
5002 · Meeting facility-internal only	-	1,593	4,470	5,000	530	12%
5015 · Investigations	-	30	70	200	130	186%
5040 · Witness & Hearing Expense	-	256	(269)	(300)	(31)	11%
5075 · Food & Bev-external costs only	111	204	-	-	-	#DIV/0!
5076 · Food & beverage - internal only	-	648	2,752	2,752	-	0%
5702 · Travel - Lodging	1,621	-	1,341	1,700	359	27%
5703 · Travel - Transportation/Parking	1,444	-	528	638	110	21%
5705 · Travel - Per Diems	-	204	204	335	131	64%
5706 · Travel - Meals	145	-	-	-	-	#DIV/0!
5810 · ABA Mid Year Meeting	-	-	1,410	2,273	863	61%
Total Program Services Expenses	3,321	2,934	10,505	12,598	2,092	20%
Salaries & Benefits						
5510 · Salaries/Wages	127,064	157,437	164,832	173,073	8,242	5%
5605 · Payroll Taxes	9,922	10,852	11,913	12,508	596	5%
5610 · Health Insurance	8,124	11,441	12,589	12,020	(569)	-5%
5630 · Dental Insurance	182	334	441	456	14	3%
5640 · Life & LTD Insurance	864	1,004	1,101	1,101	-	0%
5650 · Retirement Plan Contributions	13,987	12,313	14,644	15,376	732	5%
5655 · Retirement Plan Fees & Costs	365	711	1,046	1,046	-	0%
5660 · Training/Development	840	399	1,245	1,625	380	31%
Total Salaries/Benefit Expenses	161,347	194,491	207,811	217,206	9,395	5%
General & Administrative						
7025 · Office Supplies	132	812	263	263	-	0%
7035 · Postage/Mailing, net	89	304	818	818	-	0%
7040 · Copy/Printing Expense	342	1,253	1,153	1,153	-	0%
7050 · Computer Maintenance	-	157	1,726	1,726	-	0%
7055 · Computer Supplies & Small Equip	-	650	2,584	2,584	-	0%
7100 · Telephone	1,208	1,816	2,613	2,613	-	0%
7110 · Publications/Subscriptions	610	1,387	1,606	1,606	-	0%
7120 · Membership/Dues	510	1,428	1,064	1,064	-	0%
7150 · E&O/Off & Dir Insurance	3,979	3,684	3,765	3,953	188	5%
7176 · Bar Litigation	13,117	19,207	18,925	15,000	(3,925)	-21%
7177 · UPL	2,548	2,747	10,377	10,000	(377)	-4%
Total General & Administrative Expenses	22,536	33,521	45,053	40,940	(4,113)	-9%
Building Overhead						
6015 · Janitorial Expense	1,253	1,187	1,215	1,275	61	5%
6020 · Heat	956	698	685	720	34	5%
6025 · Electricity	1,984	1,910	1,919	2,015	96	5%
6030 · Water/Sewer	178	173	199	208	10	5%
6035 · Outside Maintenance	822	511	499	524	25	5%
6040 · Building Repairs	206	575	1,040	1,092	52	5%
6045 · Bldg Mtncn Contracts	1,557	1,631	1,460	1,533	73	5%
6050 · Bldg Mtncn Supplies	101	90	118	124	6	5%
6065 · Bldg Insurance/Fees	525	994	703	738	35	5%
6070 · Building & Improvements Depr	2,231	2,110	2,106	2,275	168	8%
6075 · Furniture & Fixtures Depr	617	618	614	664	49	8%
7065 · Computers, Equip & Sftwre Depr	5,091	6,395	6,606	7,135	529	8%
Total Building Overhead Expenses	15,523	16,892	17,163	18,301	1,138	7%
Total Expenses	202,728	247,838	280,532	289,045	8,512	3%
Net Profit (Loss)	\$ (202,728)	\$ (247,838)	\$ (280,532)	\$ (289,045)	\$ (8,512)	3%

Utah State Bar
Preliminary FY2018 Budget
Based on Actual Results through 4/30/17
08 - Computer/MIS/Internet

	Actual FY 2015	Actual FY 2016	Projected FY 2017	Draft Budget FY 2018	\$ Change 2016 Projected vs 2017 Budget	% Change 2016 Projected vs 2017 Budget
Expenses						
Program Services						
5075 · Food & Bev-external costs only	-	101	162	162	-	0%
5702 · Travel - Lodging	-	1,247	3,428	3,428	-	0%
5703 · Travel - Transportation/Parking	2,094	847	3,485	3,485	-	0%
5704 · Travel - Mileage Reimbursement	-	303	-	-	-	#DIV/0!
5705 · Travel - Per Diems	178	224	-	-	-	#DIV/0!
5805 · ABA Annual Meeting	-	460	460	460	-	0%
5810 · ABA Mid Year Meeting	-	2,260	228	228	-	0%
Total Program Services Expenses	2,272	5,440	7,764	7,764	-	0%
Salaries & Benefits						
5510 · Salaries/Wages	112,343	114,363	122,100	128,205	6,105	5%
5605 · Payroll Taxes	7,437	7,816	8,507	8,932	425	5%
5610 · Health Insurance	8,594	11,924	11,916	11,731	(185)	-2%
5630 · Dental Insurance	545	730	846	911	65	8%
5640 · Life & LTD Insurance	971	1,007	948	948	-	0%
5650 · Retirement Plan Contributions	10,717	11,159	9,312	9,778	466	5%
5655 · Retirement Plan Fees & Costs	1,342	1,551	1,091	1,091	-	0%
5660 · Training/Development	-	1,245	3,825	3,825	-	0%
Total Salaries/Benefit Expenses	141,948	149,795	158,545	165,421	6,876	4%
General & Administrative						
7025 · Office Supplies	188	681	1,713	1,713	-	0%
7040 · Copy/Printing Expense	-	-	85	85	-	0%
7045 · Internet Service	14,410	3,196	10,252	10,252	-	0%
7050 · Computer Maintenance	12,821	9,195	1,726	41,726	40,000	2318%
7055 · Computer Supplies & Small Equip	12,017	7,774	2,482	2,482	-	0%
7089 · Membership Database Fees	-	332	1,216	1,216	-	0%
7100 · Telephone	3,779	2,101	3,663	3,663	-	0%
7105 · Advertising	-	-	75	75	-	0%
7110 · Publications/Subscriptions	1,070	2,248	2,385	2,385	-	0%
7120 · Membership/Dues	-	496	372	372	-	0%
7135 · Bank Service Charges	-	39	-	-	-	#DIV/0!
7175 · O/S Consultants	3,000	6,765	10,550	10,550	-	0%
Total General & Administrative Expenses	47,284	32,827	34,518	74,518	40,000	116%
Building Overhead						
6015 · Janitorial Expense	597	565	579	608	29	5%
6020 · Heat	455	333	326	343	16	5%
6025 · Electricity	945	910	914	960	46	5%
6030 · Water/Sewer	85	83	95	99	5	5%
6035 · Outside Maintenance	392	243	238	249	12	5%
6040 · Building Repairs	98	274	495	520	25	5%
6045 · Bldg Mtncn Contracts	742	777	695	730	35	5%
6050 · Bldg Mtncn Supplies	48	43	56	59	3	5%
6065 · Bldg Insurance/Fees	250	473	335	351	17	5%
6070 · Building & Improvements Depre	1,063	1,005	1,003	1,083	80	8%
6075 · Furniture & Fixtures Depre	294	294	293	316	23	8%
7065 · Computers, Equip & Sftwre Depr	2,425	3,046	3,147	3,398	252	8%
Total Building Overhead Expenses	7,394	8,045	8,175	8,717	542	7%
Total Expenses	198,898	196,108	209,002	256,420	47,418	23%
Net Profit (Loss)	\$ (198,898)	\$ (196,108)	\$ (209,002)	\$ (256,420)	\$ (47,418)	23%

Utah State Bar
Preliminary FY2018 Budget
Based on Actual Results through 4/30/17
CLE

	Actual FY 2015	Actual FY 2016	Projected FY 2017	Draft Budget FY 2018	\$ Change 2016 Projected vs 2017 Budget	% Change 2016 Projected vs 2017 Budget
Revenue						
4051 · Meeting - Registration	140	-	-	-	-	#DIV/0!
4052 · Meeting - Sponsor Revenue	12,250	43,150	25,000	25,000	-	0%
4053 · Meeting - Vendor Revenue	1,000	-	-	-	-	#DIV/0!
4054 · Meeting - Material Sales	-	15	-	-	-	#DIV/0!
4081 · CLE - Registrations	494,596	465,369	504,799	450,000	(54,799)	-11%
4082 · CLE - Video Library Sales	143,725	69,529	110,057	105,000	(5,057)	-5%
4083 · CLE - Material Sales	560	-	-	-	-	#DIV/0!
4084 · Business Law Book Sales	-	12,825	10,026	-	(10,026)	-100%
4095 · Miscellaneous Income	-	-	9,050	-	(9,050)	-100%
4200 · Seminar Profit/Loss	(4,209)	(20,518)	(14,109)	(10,000)	4,109	-29%
Total Revenue	648,062	570,370	644,823	570,000	(74,823)	-12%
Expenses						
Program Services						
5001 · Meeting Facility-external only	22,426	13,098	17,418	15,000	(2,418)	-14%
5002 · Meeting facility-internal only	10,948	10,161	9,035	9,035	-	0%
5030 · Speaker Fees & Expenses	12,259	23,042	6,167	20,000	13,833	224%
5031 · Speaker Reimb. - Receipt Req'd	9,960	9,055	8,580	9,000	420	5%
5035 · Awards	-	1,441	1,441	1,441	-	0%
5037 · Grants/ contributions - general	-	8,250	-	-	-	#DIV/0!
5045 · Bar Anniversary	-	244	251	-	(251)	-100%
5060 · Program Special Activities	-	5,575	75	5,000	4,925	6567%
5063 · Special Event Expense	3,984	(210)	9,781	5,000	(4,781)	-49%
5064 · MCLE Fees Paid	29,752	28,404	28,791	25,000	(3,791)	-13%
5070 · Equipment Rental	5,293	9,772	9,109	10,000	891	10%
5075 · Food & Bev-external costs only	71,911	139,489	135,599	135,000	(599)	0%
5076 · Food & beverage - internal only	31,234	28,956	24,326	24,000	(326)	-1%
5079 · Soft Drinks	1,257	-	-	-	-	#DIV/0!
5085 · Misc. Program Expense	12,400	10,263	8,167	8,000	(167)	-2%
5702 · Travel - Lodging	4,025	5,939	7,988	6,000	(1,988)	-25%
5703 · Travel - Transportation/Parking	3,268	1,626	3,096	2,000	(1,096)	-35%
5704 · Travel - Mileage Reimbursement	41	512	2,535	500	(2,035)	-80%
5705 · Travel - Per Diems	640	266	627	300	(327)	-52%
5706 · Travel - Meals	-	-	78	78	-	0%
5960 · Overhead Allocation - Seminars	8,212	5,697	(24,241)	(28,739)	(4,498)	19%
5970 · Event Revenue Sharing - 3rd Pty	83,792	79,988	70,969	70,000	(969)	-1%
Total Program Services Expenses	311,401	381,567	319,793	316,615	(3,177)	-1%
Salaries & Benefits						
5510 · Salaries/Wages	83,964	88,275	81,964	116,062	34,098	42%
5605 · Payroll Taxes	6,187	6,926	6,561	8,689	2,128	32%
5610 · Health Insurance	8,144	12,648	15,494	19,341	3,847	25%
5630 · Dental Insurance	514	811	882	911	29	3%
5640 · Life & LTD Insurance	841	900	864	864	-	0%
5650 · Retirement Plan Contributions	6,707	7,268	8,077	11,481	3,404	42%
5655 · Retirement Plan Fees & Costs	1,011	1,255	1,425	1,425	-	0%
5660 · Training/Development	1,621	1,630	2,955	1,950	(1,005)	-34%
Total Salaries/Benefit Expenses	108,989	119,713	118,221	160,722	42,501	36%
General & Administrative						
7025 · Office Supplies	631	318	745	745	-	0%
7033 · Operating Meeting Supplies	-	64	108	108	-	0%
7035 · Postage/Mailing, net	5,536	12,647	3,025	4,000	975	32%
7040 · Copy/Printing Expense	39,960	28,348	23,634	21,000	(2,634)	-11%
7045 · Internet Service	574	544	365	365	-	0%
7050 · Computer Maintenance	-	157	1,726	1,726	-	0%
7055 · Computer Supplies & Small Equip	2,909	800	1,386	1,386	-	0%
7089 · Membership Database Fees	16,552	728	2,886	2,886	-	0%
7095 · Fax Equip & Supplies	-	970	-	-	-	#DIV/0!
7100 · Telephone	3,180	3,138	3,962	3,962	-	0%
7120 · Membership/Dues	245	255	255	255	-	0%

Utah State Bar
Preliminary FY2018 Budget
Based on Actual Results through 4/30/17
CLE

	Actual FY 2015	Actual FY 2016	Projected FY 2017	Draft Budget FY 2018	\$ Change 2016 Projected vs 2017 Budget	% Change 2016 Projected vs 2017 Budget
7140 · Credit Card Merchant Fees	16,771	13,350	12,611	12,611	-	0%
7175 · O/S Consultants	-	-	125	125	-	0%
7195 · Other Gen & Adm Expense	225	307	66	66	-	0%
Total General & Administrative Expenses	86,582	61,625	50,894	49,235	(1,660)	-3%
Building Overhead						
6015 · Janitorial Expense	906	858	878	922	44	5%
6020 · Heat	691	505	496	520	25	5%
6025 · Electricity	1,435	1,381	1,388	1,457	69	5%
6030 · Water/Sewer	129	125	144	151	7	5%
6035 · Outside Maintenance	594	369	361	379	18	5%
6040 · Building Repairs	149	416	752	790	38	5%
6045 · Bldg Mtnce Contracts	1,126	1,180	1,056	1,108	53	5%
6050 · Bldg Mtnce Supplies	73	65	85	89	4	5%
6055 · Real Property Taxes	8,939	11,578	12,171	12,779	609	5%
6060 · Personal Property Taxes	216	215	228	239	11	5%
6065 · Bldg Insurance/Fees	380	719	508	534	25	5%
6070 · Building & Improvements Depre	1,614	1,526	1,523	1,645	122	8%
6075 · Furniture & Fixtures Depre	447	447	444	480	36	8%
7065 · Computers, Equip & Sftwre Depr	3,682	4,625	4,778	5,160	382	8%
Total Building Overhead Expenses	20,381	24,009	24,811	26,254	1,443	6%
Total Expenses	527,352	586,914	513,719	552,826	39,107	8%
Net Profit (Loss)	\$ 120,710	\$ (16,544)	\$ 131,104	\$ 17,174	\$ (113,930)	-87%

Utah State Bar
Preliminary FY2018 Budget
Based on Actual Results through 4/30/17
10 - Summer Convention

	Actual FY 2015	Actual FY 2016	Projected FY 2017	Draft Budget FY 2018	\$ Change 2016 Projected vs 2017 Budget	% Change 2016 Projected vs 2017 Budget
Revenue						
4051 · Meeting - Registration	66,093	164,995	156,612	216,500	59,888	38%
4052 · Meeting - Sponsor Revenue	22,350	18,650	20,000	25,000	5,000	25%
4053 · Meeting - Vendor Revenue	11,750	11,500	10,600	12,000	1,400	13%
4054 · Meeting - Material Sales	275	-	-	-	-	-
4055 · Meeting - Sp Ev Registration	8,138	3,301	1,800	3,500	1,700	94%
4095 · Miscellaneous Income	6,342	-	-	-	-	-
Total Revenue	114,948	198,446	189,012	257,000	67,988	36%
Expenses						
Program Services						
5001 · Meeting Facility-external only	8,660	20,741	-	22,000	22,000	-
5002 · Meeting facility-internal only	848	1,110	1,168	1,100	(68)	-6%
5030 · Speaker Fees & Expenses	11,915	1,213	-	5,000	5,000	-
5031 · Speaker Reimb. - Receipt Req'd	-	711	1,163	-	(1,163)	-100%
5063 · Special Event Expense	6,474	806	2,399	2,000	(399)	-17%
5064 · MCLE Fees Paid	2,351	4,486	4,094	4,500	407	10%
5070 · Equipment Rental	18,688	6,381	26,731	6,700	(20,031)	-75%
5075 · Food & Bev-external costs only	118,897	123,269	102,679	124,000	21,321	21%
5076 · Food & beverage - internal only	1,399	2,621	2,657	2,600	(57)	-2%
5085 · Misc. Program Expense	-	1,079	1,358	1,100	(258)	-19%
5702 · Travel - Lodging	5,835	11,613	5,190	11,600	6,410	124%
5703 · Travel - Transportation/Parking	1,585	927	1,759	1,600	(159)	-9%
5704 · Travel - Mileage Reimbursement	3,547	2,376	231	2,400	2,169	939%
5705 · Travel - Per Diems	1,134	1,969	-	2,000	2,000	-
5815 · Commission/Education	-	350	-	-	-	-
5960 · Overhead Allocation - Seminars	-	-	20,000	20,000	-	0%
Total Program Services Expenses	181,332	179,651	169,429	206,600	37,171	22%
Salaries & Benefits						
5510 · Salaries/Wages	28,984	30,211	20,980	30,000	9,020	43%
5605 · Payroll Taxes	2,197	2,222	1,553	2,200	647	42%
5650 · Retirement Plan Contributions	2,833	2,889	2,093	3,000	907	43%
Total Salaries/Benefit Expenses	34,014	35,323	24,626	35,200	10,574	43%
General & Administrative						
7025 · Office Supplies	104	217	130	200	70	-
7035 · Postage/Mailing, net	3,558	88	34	88	54	161%
7040 · Copy/Printing Expense	10,406	3,595	6,583	4,000	(2,583)	-39%
7045 · Internet Service	-	-	45	-	(45)	-100%
7089 · Membership Database Fees	-	4,000	4,000	4,000	-	0%
7100 · Telephone	262	375	613	400	(213)	-35%
7140 · Credit Card Merchant Fees	1,719	3,751	3,271	4,000	729	22%
Total General & Administrative Expenses	16,051	12,051	14,742	12,754	(1,988)	-13%
Building Overhead						
6015 · Janitorial Expense	181	172	176	184	9	5%
6020 · Heat	138	101	99	104	5	5%
6025 · Electricity	287	276	278	291	14	5%
6030 · Water/Sewer	26	25	29	30	1	5%
6035 · Outside Maintenance	119	74	72	76	4	5%
6040 · Building Repairs	30	83	150	158	8	5%
6045 · Bldg Mtnc Contracts	225	236	211	222	11	5%
6050 · Bldg Mtnc Supplies	15	13	17	18	1	5%
6065 · Bldg Insurance/Fees	76	144	102	107	5	5%
6070 · Building & Improvements Depr	323	305	305	329	24	8%
6075 · Furniture & Fixtures Depr	89	89	89	96	7	8%
7065 · Computers, Equip & Sftwre Depr	736	925	956	1,032	76	8%
Total Building Overhead Expenses	2,245	2,443	2,482	2,647	165	7%
Total Expenses	233,641	229,468	211,279	257,201	45,922	22%
Net Profit (Loss)	\$ (118,693)	\$ (31,023)	\$ (22,267)	\$ (201)	\$ 22,066	-99%

Utah State Bar
Preliminary FY2018 Budget
Based on Actual Results through 4/30/17
11 - Fall Forum

	Actual FY 2015	Actual FY 2016	Projected FY 2017	Draft Budget FY 2018	\$ Change 2016 Projected vs 2017 Budget	% Change 2016 Projected vs 2017 Budget
Revenue						
4051 · Meeting - Registration	85,910	96,242	106,861	101,000	(5,861)	-5%
4052 · Meeting - Sponsor Revenue	500	15,000	10,000	-	(10,000)	-100%
4053 · Meeting - Vendor Revenue	12,675	9,600	12,025	10,000	(2,025)	-17%
4055 · Meeting - Sp Ev Registration	(161)	150	375	-	(375)	-100%
4095 · Miscellaneous Income	1,215	-	-	-	-	#DIV/0!
Total Revenue	100,139	120,992	129,261	111,000	(18,261)	-14%
Expenses						
Program Services						
5001 · Meeting Facility-external only	8,684	3,250	3,200	6,000	2,800	87%
5002 · Meeting facility-internal only	263	875	95	700	605	637%
5030 · Speaker Fees & Expenses	2,294	13,000	36,710	12,000	(24,710)	-67%
5031 · Speaker Reimb. - Receipt Req'd	-	2,118	652	-	(652)	-100%
5035 · Awards	-	433	361	-	(361)	-100%
5063 · Special Event Expense	1,454	-	-	-	-	#DIV/0!
5064 · MCLE Fees Paid	3,758	4,006	4,110	4,000	(110)	-3%
5070 · Equipment Rental	6,996	14,864	11,992	6,000	(5,992)	-50%
5075 · Food & Bev-external costs only	36,328	74,543	59,879	40,000	(19,879)	-33%
5076 · Food & beverage - internal only	307	12	15	15	-	0%
5085 · Misc. Program Expense	-	-	39	-	(39)	-100%
5703 · Travel - Transportation/Parking	833	259	-	-	-	#DIV/0!
5704 · Travel - Mileage Reimbursement	-	682	-	-	-	#DIV/0!
5960 · Overhead Allocation - Seminars	-	-	15,000	15,000	-	0%
Total Program Services Expenses	60,917	114,042	132,053	83,715	(48,338)	-37%
Salaries & Benefits						
5510 · Salaries/Wages	14,418	9,833	11,270	11,000	(270)	-2%
5605 · Payroll Taxes	1,100	715	832	800	(32)	-4%
5650 · Retirement Plan Contributions	1,427	883	1,082	1,200	118	11%
Total Salaries/Benefit Expenses	16,945	11,431	13,184	13,000	(184)	-1%
General & Administrative						
7025 · Office Supplies	240	442	130	300	170	130%
7035 · Postage/Mailing, net	97	3,180	75	100	25	34%
7040 · Copy/Printing Expense	4,066	5,402	5,431	5,400	(31)	-1%
7089 · Membership Database Fees	-	4,000	4,000	4,000	-	0%
7100 · Telephone	181	280	392	200	(192)	-49%
7140 · Credit Card Merchant Fees	1,697	2,298	2,731	1,800	(931)	-34%
7195 · Other Gen & Adm Expense	-	-	66	100	34	51%
Total General & Administrative Expenses	6,282	15,602	12,826	11,950	(876)	-7%
Building Overhead						
6015 · Janitorial Expense	181	172	176	184	9	5%
6020 · Heat	138	101	99	104	5	5%
6025 · Electricity	287	276	278	291	14	5%
6030 · Water/Sewer	26	25	29	30	1	5%
6035 · Outside Maintenance	119	74	72	76	4	5%
6040 · Building Repairs	30	83	150	158	8	5%
6045 · Bldg Mtncn Contracts	225	236	211	222	11	5%
6050 · Bldg Mtncn Supplies	15	13	17	18	1	5%
6065 · Bldg Insurance/Fees	76	144	102	107	5	5%
6070 · Building & Improvements Depr	323	305	305	329	24	8%
6075 · Furniture & Fixtures Depr	89	89	89	96	7	8%
7065 · Computers, Equip & Sftwre Depr	736	925	956	1,032	76	8%
Total Building Overhead Expenses	2,245	2,443	2,482	2,647	165	7%
Total Expenses	86,389	143,518	160,546	111,312	(49,233)	-31%
Net Profit (Loss)	\$ 13,750	\$ (22,526)	\$ (31,285)	\$ (312)	\$ 30,972	-99%

Utah State Bar
Preliminary FY2018 Budget
Based on Actual Results through 4/30/17
12 - Spring Convention

	Actual FY 2015	Actual FY 2016	Projected FY 2017	Draft Budget FY 2018	\$ Change 2016 Projected vs 2017 Budget	% Change 2016 Projected vs 2017 Budget
Revenue						
4051 · Meeting - Registration	95,726	104,053	131,352	115,000	(16,352)	-12%
4052 · Meeting - Sponsor Revenue	14,750	14,850	17,650	17,000	(650)	-4%
4053 · Meeting - Vendor Revenue	11,050	10,450	12,000	12,000	-	0%
4055 · Meeting - Sp Ev Registration	2,417	2,917	3,211	3,200	(11)	0%
Total Revenue	123,943	132,270	164,213	147,200	(17,013)	-10%
Expenses						
Program Services						
5001 · Meeting Facility-external only	6,527	8,165	6,922	8,000	1,078	16%
5002 · Meeting facility-internal only	350	438	605	600	(5)	-1%
5030 · Speaker Fees & Expenses	5,100	5,000	5,432	6,000	568	10%
5031 · Speaker Reimb. - Receipt Req'd	2,435	3,023	235	1,500	1,265	539%
5035 · Awards	144	-	200	-	(200)	-100%
5060 · Program Special Activities	-	250	250	250	-	0%
5063 · Special Event Expense	2,068	6,200	8,906	9,000	94	1%
5064 · MCLE Fees Paid	3,706	3,971	5,252	4,500	(752)	-14%
5070 · Equipment Rental	3,391	2,798	3,068	3,500	432	14%
5075 · Food & Bev-external costs only	34,270	31,384	33,316	36,400	3,084	9%
5076 · Food & beverage - internal only	1,114	1,022	1,500	1,500	-	0%
5085 · Misc. Program Expense	332	988	-	900	900	#DIV/0!
5702 · Travel - Lodging	6,948	4,790	1,282	3,000	1,718	134%
5704 · Travel - Mileage Reimbursement	2,769	2,340	1,935	2,000	65	3%
5705 · Travel - Per Diems	620	537	402	400	(2)	0%
5960 · Overhead Allocation - Seminars	-	-	15,000	15,000	-	0%
5970 · Event Revenue Sharing - 3rd Pty	897	-	-	-	-	#DIV/0!
Total Program Services Expenses	70,672	70,906	84,306	92,550	8,244	10%
Salaries & Benefits						
5510 · Salaries/Wages	16,360	13,159	18,500	19,425	925	5%
5605 · Payroll Taxes	1,280	1,004	1,500	1,575	75	5%
5650 · Retirement Plan Contributions	1,451	1,297	1,850	1,943	93	5%
Total Salaries/Benefit Expenses	19,090	15,460	21,850	22,943	1,093	5%
General & Administrative						
7025 · Office Supplies	51	217	849	800	(49)	-6%
7033 · Operating Meeting Supplies	-	-	-	-	-	#DIV/0!
7035 · Postage/Mailing, net	10	22	1	22	21	1471%
7040 · Copy/Printing Expense	2,751	5,332	6,261	6,500	239	4%
7045 · Internet Service	425	-	-	-	-	#DIV/0!
7055 · Computer Supplies & Small Equip	-	90	-	-	-	#DIV/0!
7089 · Membership Database Fees	4,000	-	-	-	-	#DIV/0!
7100 · Telephone	184	273	911	911	-	0%
7140 · Credit Card Merchant Fees	2,146	2,403	3,057	3,000	(57)	-2%
7195 · Other Gen & Adm Expense	642	-	66	66	-	0%
Total General & Administrative Expenses	10,208	8,337	11,145	11,299	154	1%
Building Overhead						
6015 · Janitorial Expense	181	172	176	184	9	5%
6020 · Heat	138	101	99	104	5	5%
6025 · Electricity	287	276	278	291	14	5%
6030 · Water/Sewer	26	25	29	30	1	5%
6035 · Outside Maintenance	119	74	72	76	4	5%
6040 · Building Repairs	30	83	150	158	8	5%
6045 · Bldg Mtnc Contracts	225	236	211	222	11	5%
6050 · Bldg Mtnc Supplies	15	13	17	18	1	5%
6065 · Bldg Insurance/Fees	76	144	102	107	5	5%
6070 · Building & Improvements Depre	323	305	305	329	24	8%
6075 · Furniture & Fixtures Depre	89	89	89	96	7	8%
7065 · Computers, Equip & Sftwre Depre	736	925	956	1,032	76	8%
Total Building Overhead Expenses	2,245	2,443	2,482	2,647	165	7%
Total Expenses	102,215	97,146	119,783	129,439	9,656	8%
Net Profit (Loss)	\$ 21,728	\$ 35,124	\$ 44,430	\$ 17,761	\$ (26,669)	-60%

Utah State Bar
Preliminary FY2018 Budget
Based on Actual Results through 4/30/17
13 - Bar Journal

	Actual FY 2015	Actual FY 2016	Projected FY 2017	Draft Budget FY 2018	\$ Change 2016 Projected vs 2017 Budget	% Change 2016 Projected vs 2017 Budget
Revenue						
4061 · Advertising Revenue	130,162	141,648	134,573	134,573	-	0%
4062 · Subscriptions	240	150	60	61	1	2%
4071 · Mem Benefits - Lexis	-	-	833	-	(833)	-100%
4072 · Royalty Inc - Bar J, MBNA, LM,M	5,712	5,522	7,078	5,000	(2,078)	-29%
Total Revenue	136,114	147,319	142,545	139,634	(2,910)	-2%
Expenses						
Program Services						
5002 · Meeting facility-internal only	1,050	963	1,030	1,030	-	0%
5076 · Food & beverage - internal only	2,870	2,966	2,488	2,500	12	0%
5085 · Misc. Program Expense	-	-	21	-	(21)	-100%
5090 · Commission Expense	24,022	23,973	23,856	23,856	-	0%
Total Program Services Expenses	27,941	27,901	27,395	27,386	(9)	0%
Salaries & Benefits						
5510 · Salaries/Wages	25,038	23,109	23,133	24,290	1,157	5%
5605 · Payroll Taxes	1,822	1,657	1,597	1,677	80	5%
5610 · Health Insurance	2,865	3,162	3,420	3,692	272	8%
5630 · Dental Insurance	182	203	221	228	7	3%
5640 · Life & LTD Insurance	221	203	195	195	-	0%
5650 · Retirement Plan Contributions	2,466	2,301	2,292	2,407	115	5%
5655 · Retirement Plan Fees & Costs	314	384	356	356	-	0%
5660 · Training/Development	-	-	225	225	-	0%
Total Salaries/Benefit Expenses	32,907	31,020	31,439	33,070	1,630	5%
General & Administrative						
7025 · Office Supplies	37	1	13	13	-	0%
7035 · Postage/Mailing, net	29,072	29,138	29,141	29,141	-	0%
7040 · Copy/Printing Expense	86,603	76,797	71,553	71,553	-	0%
7045 · Internet Service	54	16	92	92	-	0%
7055 · Computer Supplies & Small Equip	236	54	-	-	-	#DIV/0!
7100 · Telephone	301	453	652	652	-	0%
7138 · Bad debt expense	-	1,890	1,890	1,890	-	0%
7140 · Credit Card Merchant Fees	250	215	563	563	-	0%
Total General & Administrative Expenses	116,553	108,564	103,903	103,903	-	0%
Building Overhead						
6015 · Janitorial Expense	119	112	115	121	6	5%
6020 · Heat	91	66	65	68	3	5%
6025 · Electricity	188	181	182	191	9	5%
6030 · Water/Sewer	17	16	19	20	1	5%
6035 · Outside Maintenance	78	48	47	50	2	5%
6040 · Building Repairs	20	54	99	104	5	5%
6045 · Bldg Mtncn Contracts	148	155	138	145	7	5%
6050 · Bldg Mtncn Supplies	10	9	11	12	1	5%
6065 · Bldg Insurance/Fees	50	94	67	70	3	5%
6070 · Building & Improvements Depre	211	200	200	216	16	8%
6075 · Furniture & Fixtures Depre	58	59	58	63	5	8%
7065 · Computers, Equip & Sftwre Depre	482	606	626	676	50	8%
Total Building Overhead Expenses	1,471	1,601	1,626	1,734	108	7%
Total Expenses	178,872	169,086	164,363	166,093	1,729	1%
Net Profit (Loss)	\$ (42,759)	\$ (21,766)	\$ (21,819)	\$ (26,458)	\$ (4,640)	21%

Utah State Bar
Preliminary FY2018 Budget
Based on Actual Results through 4/30/17
14 - Committees

	Actual FY 2015	Actual FY 2016	Projected FY 2017	Draft Budget FY 2018	\$ Change 2016 Projected vs 2017 Budget	% Change 2016 Projected vs 2017 Budget
Revenue						
4093 · Law Day Revenue	5,145	6,380	2,453	4,000	1,547	63%
4095 · Miscellaneous Income	10	50	50	50	-	0%
Total Revenue	5,155	6,430	2,503	4,050	1,547	62%
Expenses						
Program Services						
5002 · Meeting facility-internal only	2,083	2,989	3,283	3,283	-	0%
5035 · Awards	-	-	26	26	-	0%
5061 · LRE - Bar Support	65,000	65,000	65,000	65,000	-	0%
5062 · Law Day	9,042	8,301	12,000	10,000	(2,000)	-17%
5070 · Equipment Rental	-	98	98	98	-	0%
5075 · Food & Bev-external costs only	982	120	-	-	-	#DIV/0!
5076 · Food & beverage - internal only	3,696	3,383	3,620	3,620	-	0%
5085 · Misc. Program Expense	-	84	-	-	-	#DIV/0!
5096 · UDR Support	10,000	-	10,000	-	(10,000)	-100%
Total Program Services Expenses	90,803	79,974	94,026	82,026	(12,000)	-13%
Salaries & Benefits						
5510 · Salaries/Wages	22,603	24,029	24,640	25,871	1,232	5%
5605 · Payroll Taxes	1,744	1,634	1,726	1,812	86	5%
5610 · Health Insurance	2,865	3,162	3,420	3,692	272	8%
5630 · Dental Insurance	182	203	221	228	7	3%
5640 · Life & LTD Insurance	221	203	195	195	-	0%
5650 · Retirement Plan Contributions	2,228	2,252	2,450	2,573	123	5%
5655 · Retirement Plan Fees & Costs	314	384	356	356	-	0%
5660 · Training/Development	-	-	125	125	-	0%
Total Salaries/Benefit Expenses	30,157	31,867	33,132	34,852	1,720	5%
General & Administrative						
7025 · Office Supplies	22	201	8	8	-	0%
7035 · Postage/Mailing, net	139	167	160	160	-	0%
7040 · Copy/Printing Expense	727	828	400	400	-	0%
7045 · Internet Service	-	41	-	-	-	#DIV/0!
7100 · Telephone	332	464	675	675	-	0%
7177 · UPL	-	3	-	-	-	#DIV/0!
Total General & Administrative Expenses	1,221	1,705	1,242	1,242	-	0%
Building Overhead						
6015 · Janitorial Expense	119	112	115	121	6	5%
6020 · Heat	91	66	65	68	3	5%
6025 · Electricity	188	181	182	191	9	5%
6030 · Water/Sewer	17	16	19	20	1	5%
6035 · Outside Maintenance	78	48	47	50	2	5%
6040 · Building Repairs	20	54	99	104	5	5%
6045 · Bldg Mtncn Contracts	148	155	138	145	7	5%
6050 · Bldg Mtncn Supplies	10	9	11	12	1	5%
6065 · Bldg Insurance/Fees	50	94	67	70	3	5%
6070 · Building & Improvements Depr	211	200	200	216	16	8%
6075 · Furniture & Fixtures Depr	58	59	58	63	5	8%
7065 · Computers, Equip & Sftwre Depr	482	606	626	676	50	8%
Total Building Overhead Expenses	1,471	1,601	1,626	1,734	108	7%
Total Expenses	123,652	115,147	130,027	119,855	(10,172)	-8%
Net Profit (Loss)	\$ (118,497)	\$ (108,717)	\$ (127,524)	\$ (115,805)	\$ 11,719	-9%

Utah State Bar
Preliminary FY2018 Budget
Based on Actual Results through 4/30/17
15 - Member Benefits

	Actual FY 2015	Actual FY 2016	Projected FY 2017	Draft Budget FY 2018	\$ Change 2016 Projected vs 2017 Budget	% Change 2016 Projected vs 2017 Budget
Revenue						
4071 · Mem Benefits - Lexis	3,095	2,715	-	-	-	#DIV/0!
4072 · Royalty Inc - Bar J, MBNA, LM,M	5	839	-	-	-	#DIV/0!
4093 · Law Day Revenue	-	-	1,140	1,163	23	2%
Total Revenue	3,101	3,554	1,140	1,163	23	2%
Expenses						
Program Services						
5047 · Casemaker	68,913	75,643	70,683	70,000	(683)	-1%
5099 · Blomquist Hale	73,887	73,966	73,951	75,000	1,049	1%
Total Program Services Expenses	142,800	149,609	144,635	145,000	365	0%
Salaries & Benefits						
5510 · Salaries/Wages	627	332	268	281	13	5%
5605 · Payroll Taxes	47	23	19	20	1	5%
5650 · Retirement Plan Contributions	63	33	27	28	1	5%
Total Salaries/Benefit Expenses	737	388	314	329	16	5%
General & Administrative						
7035 · Postage/Mailing, net	-	9	-	-	-	#DIV/0!
7040 · Copy/Printing Expense	-	1,133	-	-	-	#DIV/0!
Total General & Administrative Expenses	-	1,143	-	-	-	#DIV/0!
Building Overhead						
6015 · Janitorial Expense	109	104	106	111	5	5%
6020 · Heat	83	61	60	63	3	5%
6025 · Electricity	173	167	167	176	8	5%
6030 · Water/Sewer	16	15	17	18	1	5%
6035 · Outside Maintenance	72	45	44	46	2	5%
6040 · Building Repairs	18	50	91	95	5	5%
6045 · Bldg Mtncn Contracts	136	142	127	134	6	5%
6050 · Bldg Mtncn Supplies	9	8	10	11	1	5%
6065 · Bldg Insurance/Fees	46	87	61	64	3	5%
6070 · Building & Improvements Depre	195	184	184	199	15	8%
6075 · Furniture & Fixtures Depre	54	54	54	58	4	8%
7065 · Computers, Equip & Sftwre Depr	444	558	577	623	46	8%
Total Building Overhead Expenses	1,355	1,474	1,498	1,597	99	7%
Total Expenses	144,892	152,614	146,446	146,927	480	0%
Net Profit (Loss)	\$ (141,791)	\$ (149,060)	\$ (145,306)	\$ (145,764)	\$ (457)	0%

Utah State Bar
Preliminary FY2018 Budget
Based on Actual Results through 4/30/17
16 - Section Support

	Actual FY 2015	Actual FY 2016	Projected FY 2017	Draft Budget FY 2018	\$ Change 2016 Projected vs 2017 Budget	% Change 2016 Projected vs 2017 Budget
Revenue						
4010 · Section/Local Bar Support fees	78,332	83,223	81,000	84,000	3,000	4%
Total Revenue	78,332	83,223	81,000	84,000	3,000	4%
Expenses						
Program Services						
5002 · Meeting facility-internal only	-	-	113	113	-	0%
5076 · Food & beverage - internal only	-	-	271	271	-	0%
5703 · Travel - Transportation/Parking	-	2	2	2	-	0%
Total Program Services Expenses	-	2	386	386	-	0%
Salaries & Benefits						
5510 · Salaries/Wages	44,876	51,098	50,345	52,862	2,517	5%
5605 · Payroll Taxes	3,476	3,723	3,933	4,130	197	5%
5610 · Health Insurance	5,729	6,324	4,926	3,969	(957)	-19%
5630 · Dental Insurance	363	405	405	456	51	13%
5640 · Life & LTD Insurance	377	350	296	296	-	0%
5650 · Retirement Plan Contributions	3,997	4,304	2,488	2,613	124	5%
5655 · Retirement Plan Fees & Costs	8	610	712	712	-	0%
5660 · Training/Development	-	-	650	650	-	0%
Total Salaries/Benefit Expenses	58,827	66,814	63,756	65,688	1,932	3%
General & Administrative						
7025 · Office Supplies	-	-	-	-	-	#DIV/0!
7035 · Postage/Mailing, net	-	-	-	-	-	#DIV/0!
7040 · Copy/Printing Expense	66	29	95	95	-	0%
7050 · Computer Maintenance	-	78	863	863	-	0%
7089 · Membership Database Fees	8,435	806	293	293	-	0%
7100 · Telephone	603	906	1,304	1,304	-	0%
7140 · Credit Card Merchant Fees	34	-	-	-	-	#DIV/0!
7175 · O/S Consultants	-	2,145	-	-	-	#DIV/0!
Total General & Administrative Expenses	9,137	3,965	2,555	2,555	-	0%
Building Overhead						
6015 · Janitorial Expense	200	189	194	204	10	5%
6020 · Heat	153	111	109	115	5	5%
6025 · Electricity	317	305	306	322	15	5%
6030 · Water/Sewer	28	28	32	33	2	5%
6035 · Outside Maintenance	131	82	80	84	4	5%
6040 · Building Repairs	33	92	166	174	8	5%
6045 · Bldg Mtncn Contracts	249	260	233	245	12	5%
6050 · Bldg Mtncn Supplies	16	14	19	20	1	5%
6055 · Real Property Taxes	8,939	11,578	12,171	12,779	609	5%
6060 · Personal Property Taxes	216	215	228	239	11	5%
6065 · Bldg Insurance/Fees	84	159	112	118	6	5%
6070 · Building & Improvements Depre	356	337	336	363	27	8%
6075 · Furniture & Fixtures Depre	99	99	98	106	8	8%
7065 · Computers, Equip & Sftwre Depre	813	1,021	1,054	1,139	84	8%
Total Building Overhead Expenses	11,632	14,489	15,138	15,940	802	5%
Total Expenses	79,596	85,271	81,834	84,568	2,734	3%
Net Profit (Loss)	\$ (1,264)	\$ (2,048)	\$ (834)	\$ (568)	\$ 266	-32%

Utah State Bar
Preliminary FY2018 Budget
Based on Actual Results through 4/30/17
17 - Consumer Assistance

	Actual FY 2015	Actual FY 2016	Projected FY 2017	Draft Budget FY 2018	\$ Change 2016 Projected vs 2017 Budget	% Change 2016 Projected vs 2017 Budget
Expenses						
Program Services						
5002 · Meeting facility-internal only	613	-	-	-	-	#DIV/0!
5704 · Travel - Mileage Reimbursement	102	36	11	11	-	0%
Total Program Services Expenses	715	36	11	11	-	0%
Salaries & Benefits						
5510 · Salaries/Wages	75,119	83,489	88,757	90,532	1,775	2%
5605 · Payroll Taxes	5,335	5,772	5,982	6,101	120	2%
5610 · Health Insurance	3,380	6,324	7,880	10,004	2,125	27%
5630 · Dental Insurance	212	393	441	456	14	3%
5640 · Life & LTD Insurance	401	647	603	603	-	0%
5650 · Retirement Plan Contributions	7,085	7,978	8,441	8,610	169	2%
5655 · Retirement Plan Fees & Costs	197	664	712	712	-	0%
5660 · Training/Development	-	409	759	759	-	0%
Total Salaries/Benefit Expenses	91,730	105,676	113,575	117,777	4,203	4%
General & Administrative						
7025 · Office Supplies	264	94	132	132	-	0%
7035 · Postage/Mailing, net	375	350	339	339	-	0%
7040 · Copy/Printing Expense	25	37	32	32	-	0%
7055 · Computer Supplies & Small Equip	66	255	255	255	-	0%
7100 · Telephone	2,828	2,475	3,201	3,201	-	0%
7120 · Membership/Dues	620	575	555	555	-	0%
Total General & Administrative Expenses	4,178	3,785	4,515	4,515	-	0%
Building Overhead						
6015 · Janitorial Expense	113	429	439	461	22	5%
6020 · Heat	69	253	248	260	12	5%
6025 · Electricity	181	690	694	728	35	5%
6030 · Water/Sewer	17	63	72	75	4	5%
6035 · Outside Maintenance	37	185	180	189	9	5%
6040 · Building Repairs	15	208	376	395	19	5%
6045 · Bldg Mtncn Contracts	173	590	528	554	26	5%
6050 · Bldg Mtncn Supplies	8	33	43	45	2	5%
6065 · Bldg Insurance/Fees	48	359	254	267	13	5%
6070 · Building & Improvements Depre	202	763	762	822	61	8%
6075 · Furniture & Fixtures Depre	58	223	222	240	18	8%
7065 · Computers, Equip & Sftwre Depr	598	2,312	2,389	2,580	191	8%
Total Building Overhead Expenses	1,519	6,108	6,206	6,618	411	7%
Total Expenses	98,142	115,605	124,306	128,920	4,614	4%
Net Profit (Loss)	\$ (98,142)	\$ (115,605)	\$ (124,306)	\$ (128,920)	\$ (4,614)	4%

Utah State Bar
Preliminary FY2018 Budget
Based on Actual Results through 4/30/17
18 - Access to Justice

	Actual FY 2015	Actual FY 2016	Projected FY 2017	Draft Budget FY 2018	\$ Change 2016 Projected vs 2017 Budget	% Change 2016 Projected vs 2017 Budget
Revenue						
4063 · Modest Means revenue	15,970	15,945	12,750	13,000	250	2%
4200 · Seminar Profit/Loss	(451)	281	281	286	6	2%
Total Revenue	15,519	16,226	13,031	13,286	256	2%
Expenses						
Program Services						
5002 · Meeting facility-internal only	4,367	2,773	2,133	2,133	-	0%
5035 · Awards	-	45	72	-	(72)	-100%
5037 · Grants/ contributions - general	-	380	1,000	1,000	-	0%
5060 · Program Special Activities	-	697	-	-	-	#DIV/0!
5075 · Food & Bev-external costs only	5,263	4,734	1,886	2,500	614	33%
5076 · Food & beverage - internal only	7,461	6,705	5,149	6,000	851	17%
5085 · Misc. Program Expense	-	-	50	50	-	0%
5702 · Travel - Lodging	1,345	733	-	-	-	#DIV/0!
5703 · Travel - Transportation/Parking	1,761	444	161	161	-	0%
5704 · Travel - Mileage Reimbursement	3,915	3,366	2,247	2,247	-	0%
5705 · Travel - Per Diems	506	55	-	-	-	#DIV/0!
5706 · Travel - Meals	-	24	24	24	-	0%
Total Program Services Expenses	24,618	19,955	12,722	14,114	1,393	11%
Salaries & Benefits						
5510 · Salaries/Wages	84,530	89,031	90,835	98,102	7,267	8%
5605 · Payroll Taxes	7,115	6,901	7,019	7,581	562	8%
5610 · Health Insurance	10,023	13,131	10,691	13,306	2,615	24%
5630 · Dental Insurance	635	841	808	1,367	559	69%
5640 · Life & LTD Insurance	707	738	671	671	-	0%
5650 · Retirement Plan Contributions	5,446	1,364	5,386	5,817	431	8%
5655 · Retirement Plan Fees & Costs	106	221	868	868	-	0%
5660 · Training/Development	510	390	600	600	-	0%
Total Salaries/Benefit Expenses	109,071	112,616	116,877	128,310	11,433	10%
General & Administrative						
7025 · Office Supplies	120	76	229	229	-	0%
7035 · Postage/Mailing, net	58	16	17	17	-	0%
7040 · Copy/Printing Expense	501	1,259	631	631	-	0%
7045 · Internet Service	98	-	1,803	1,803	-	0%
7050 · Computer Maintenance	-	707	7,776	7,000	(776)	-10%
7055 · Computer Supplies & Small Equip	97	384	11	11	-	0%
7089 · Membership Database Fees	3,594	3,930	2,886	2,600	(286)	-10%
7100 · Telephone	1,852	2,853	4,030	4,030	-	0%
7115 · Public Relations	-	189	-	-	-	#DIV/0!
7120 · Membership/Dues	845	875	255	255	-	0%
7140 · Credit Card Merchant Fees	572	999	690	690	-	0%
7140 · Credit Card Merchant Fees - Other	-	-	-	-	-	#DIV/0!
7150 · E&O/Off & Dir Insurance	12,767	12,844	13,144	13,802	657	5%
7175 · O/S Consultants	-	3,675	525	525	-	0%
7195 · Other Gen & Adm Expense	125	750	-	-	-	#DIV/0!
Total General & Administrative Expenses	20,958	28,555	31,996	31,592	(405)	-1%
Building Overhead						
6015 · Janitorial Expense	875	829	848	891	42	5%
6020 · Heat	668	488	479	503	24	5%
6025 · Electricity	1,385	1,333	1,340	1,407	67	5%
6030 · Water/Sewer	124	121	139	146	7	5%
6035 · Outside Maintenance	574	357	348	366	17	5%
6040 · Building Repairs	144	401	726	763	36	5%
6045 · Bldg Mtncn Contracts	1,087	1,139	1,019	1,070	51	5%
6050 · Bldg Mtncn Supplies	71	63	82	86	4	5%
6065 · Bldg Insurance/Fees	367	694	491	515	25	5%
6070 · Building & Improvements Depre	1,558	1,473	1,471	1,588	118	8%
6075 · Furniture & Fixtures Depre	431	431	429	463	34	8%

Utah State Bar
Preliminary FY2018 Budget
Based on Actual Results through 4/30/17
18 - Access to Justice

	Actual FY 2015	Actual FY 2016	Projected FY 2017	Draft Budget FY 2018	\$ Change 2016 Projected vs 2017 Budget	% Change 2016 Projected vs 2017 Budget
7065 - Computers, Equip & Sftwre Depr	3,555	4,465	4,613	4,982	369	8%
Total Building Overhead Expenses	10,839	11,795	11,984	12,779	795	7%
Total Expenses	165,485	172,921	173,580	186,795	13,215	8%
Net Profit (Loss)	\$ (149,967)	\$ (156,695)	\$ (160,549)	\$ (173,509)	\$ (12,960)	8%

Utah State Bar
Preliminary FY2018 Budget
Based on Actual Results through 4/30/17
19 - Tuesday Night Bar

	Actual FY 2015	Actual FY 2016	Projected FY 2017	Draft Budget FY 2018	\$ Change 2016 Projected vs 2017 Budget	% Change 2016 Projected vs 2017 Budget
Expenses						
Program Services						
5002 · Meeting facility-internal only	26,910	28,290	26,393	27,000	608	2%
5075 · Food & Bev-external costs only	561	568	632	600	(32)	-5%
5076 · Food & beverage - Internal only	387	400	360	400	40	11%
5085 · Misc. Program Expense	3,732	3,648	3,612	3,612	-	0%
Total Program Services Expenses	31,590	32,906	30,996	31,612	616	2%
Salaries & Benefits						
5510 · Salaries/Wages	3,161	3,425	3,255	3,418	163	5%
5605 · Payroll Taxes	270	289	269	283	13	5%
5650 · Retirement Plan Contributions	40	35	201	211	10	5%
Total Salaries/Benefit Expenses	3,471	3,750	3,826	4,012	186	5%
General & Administrative						
7025 · Office Supplies	-	19	13	13	-	0%
7110 · Publications/Subscriptions	567	630	203	203	-	0%
Total General & Administrative Expenses	567	649	216	216	-	0%
Total Expenses	35,628	37,305	35,038	35,840	802	2%
Net Profit (Loss)	\$ (35,628)	\$ (37,305)	\$ (35,038)	\$ (35,840)	\$ (802)	2%

Utah State Bar
Preliminary FY2018 Budget
Based on Actual Results through 4/30/17
20 - Legislative

	Actual FY 2015	Actual FY 2016	Projected FY 2017	Draft Budget FY 2018	\$ Change 2016 Projected vs 2017 Budget	% Change 2016 Projected vs 2017 Budget
Expenses						
Program Services						
5002 · Meeting facility-internal only	2,133	1,615	1,645	1,645	-	0%
5055 · Legislative Expense	51,854	21,100	43,000	43,000	-	0%
5070 · Equipment Rental	-	32	414	414	-	0%
5075 · Food & Bev-external costs only	-	-	608	608	-	0%
5076 · Food & beverage - internal only	5,054	5,180	3,947	3,947	-	0%
Total Program Services Expenses	59,041	27,928	49,614	49,614	-	0%
Salaries & Benefits						
5510 · Salaries/Wages	7,429	610	2,094	2,199	105	5%
5605 · Payroll Taxes	578	46	161	170	8	5%
5650 · Retirement Plan Contributions	713	47	194	203	10	5%
Total Salaries/Benefit Expenses	8,720	703	2,449	2,572	122	5%
Total Expenses	67,761	28,631	52,063	52,186	122	0%
Net Profit (Loss)	\$ (67,761)	\$ (28,631)	\$ (52,063)	\$ (52,186)	\$ (122)	0%

Utah State Bar
Preliminary FY2018 Budget
Based on Actual Results through 4/30/17
21 - Commission/Sp Projects

	Actual FY 2015	Actual FY 2016	Projected FY 2017	Draft Budget FY 2018	\$ Change 2016 Projected vs 2017 Budget	% Change 2016 Projected vs 2017 Budget
Revenue						
4052 · Meeting - Sponsor Revenue	\$ 4,650	\$ -	\$ -	\$ -	\$ -	#DIV/0!
4095 · Miscellaneous Income	9,255	54	24	-	(24)	-100%
Total Revenue	13,905	54	24	-	(24)	-100%
Expenses						
Program Services						
5001 · Meeting Facility-external only	3,703	761	489	489	-	0%
5002 · Meeting facility-internal only	6,193	5,094	8,318	5,000	(3,318)	-40%
5035 · Awards	1,755	1,349	1,738	1,000	(738)	-42%
5037 · Grants/ contributions - general	-	8,000	3,900	5,000	1,100	28%
5042 · Operations Audit	-	5,984	28,500	-	(28,500)	-100%
5045 · Bar Anniversary	-	15,782	-	-	-	#DIV/0!
5063 · Special Event Expense	56,165	800	411	2,000	1,589	386%
5070 · Equipment Rental	200	439	948	1,000	52	6%
5075 · Food & Bev-external costs only	3,624	9,778	17,837	22,000	4,163	23%
5076 · Food & beverage - internal only	12,861	5,267	9,803	9,803	-	0%
5085 · Misc. Program Expense	-	1,216	643	643	-	0%
5090 · Commission Expense	1,829	0	-	-	-	#DIV/0!
5501 · Books Purchased-BFB	9,822	-	-	-	-	#DIV/0!
5702 · Travel - Lodging	2,870	5,364	8,296	10,000	1,704	21%
5703 · Travel - Transportation/Parking	1,332	2,926	4,864	7,000	2,136	44%
5704 · Travel - Mileage Reimbursement	4,548	343	324	324	-	0%
5705 · Travel - Per Diems	904	176	1,319	1,319	-	0%
5706 · Travel - Meals	-	277	192	192	-	0%
5707 · Travel - Commission Mtgs	25,021	38,250	45,359	46,000	641	1%
5805 · ABA Annual Meeting	6,028	920	3,759	5,000	1,241	33%
5810 · ABA Mid Year Meeting	4,455	2,050	4,019	5,000	981	24%
5815 · Commission/Education	600	8,476	22,900	25,000	2,100	9%
5820 · ABA Annual Delegate	8,675	8,541	14,106	11,000	(3,106)	-22%
5830 · Western States Bar Conference	13,284	2,785	12,000	5,500	(6,500)	-54%
5840 · President's Expense	11,753	21,784	19,495	18,000	(1,495)	-8%
5841 · President's Reimbursement	-	8,845	3,882	4,000	118	3%
5850 · Leadership Academy	-	6,598	21,500	20,000	(1,500)	-7%
5855 · Bar Review	-	1,465	330	1,500	1,170	355%
5865 · Retreat	12,311	29,840	21,080	21,000	(80)	0%
Total Program Services Expenses	187,934	193,110	256,011	227,770	(28,242)	-11%
Salaries & Benefits						
5510 · Salaries/Wages	9,739	6,362	7,924	8,320	396	5%
5605 · Payroll Taxes	697	443	529	556	26	5%
5650 · Retirement Plan Contributions	851	572	756	794	38	5%
Total Salaries/Benefit Expenses	11,287	7,377	9,210	9,670	460	5%
General & Administrative						
7025 · Office Supplies	578	-	-	-	-	#DIV/0!
7035 · Postage/Mailing, net	1,312	233	921	921	-	0%
7040 · Copy/Printing Expense	2,736	15,779	5,000	5,000	-	0%
7045 · Internet Service	654	2,631	2,164	2,164	-	0%
7089 · Membership Database Fees	-	-	1,500	1,500	-	0%
7100 · Telephone	219	293	278	278	-	0%
7140 · Credit Card Merchant Fees	22	4	1	1	-	0%
7145 · Commission Election Expense	1,625	3,250	3,250	3,500	250	8%
7150 · E&O/Off & Dir Insurance	8,802	3,000	5,989	5,000	(989)	-17%
7175 · O/S Consultants	-	-	6,000	-	(6,000)	-100%
7195 · Other Gen & Adm Expense	1,590	1,143	804	1,000	196	24%
Total General & Administrative Expenses	17,538	26,332	25,907	19,364	(6,543)	-25%
Total Expenses	216,758	226,819	291,128	256,804	(34,324)	-12%
Net Profit (Loss)	\$ (202,853)	\$ (226,765)	\$ (291,104)	\$ (256,804)	\$ 34,300	-12%

Utah State Bar
Preliminary FY2018 Budget
Based on Actual Results through 4/30/17
22 - Public Education

	Actual FY 2015	Actual FY 2016	Projected FY 2017	Draft Budget FY 2018	\$ Change 2016 Projected vs 2017 Budget	% Change 2016 Projected vs 2017 Budget
Expenses						
Program Services						
5002 · Meeting facility-internal only	-	135	-	-	-	#DIV/0!
5062 · Law Day	-	5,859	7,768	7,000	(768)	-10%
5063 · Special Event Expense	2,789	-	-	-	-	#DIV/0!
5075 · Food & Bev-external costs only	1,064	22	134	134	-	0%
5076 · Food & beverage - internal only	-	232	-	-	-	#DIV/0!
5702 · Travel - Lodging	-	898	1,276	1,276	-	0%
5703 · Travel - Transportation/Parking	-	2	625	625	-	0%
5704 · Travel - Mileage Reimbursement	414	344	322	322	-	0%
5705 · Travel - Per Diems	60	270	236	236	-	0%
Total Program Services Expenses	4,327	7,761	10,360	9,592	(768)	-7%
Salaries & Benefits						
5510 · Salaries/Wages	70,396	67,298	70,986	74,535	3,549	5%
5605 · Payroll Taxes	5,155	5,325	5,254	5,516	263	5%
5610 · Health Insurance	5,729	6,324	7,880	10,004	2,125	27%
5630 · Dental Insurance	363	405	441	456	14	3%
5640 · Life & LTD Insurance	534	513	503	503	-	0%
5650 · Retirement Plan Contributions	6,663	6,900	6,812	7,152	341	5%
5655 · Retirement Plan Fees & Costs	24	615	712	712	-	0%
5660 · Training/Development	234	524	775	775	-	0%
Total Salaries/Benefit Expenses	89,099	87,905	93,363	99,655	6,292	7%
General & Administrative						
7025 · Office Supplies	22	127	176	176	-	0%
7035 · Postage/Mailing, net	7	-	6	6	-	0%
7040 · Copy/Printing Expense	12	2,071	925	925	-	0%
7045 · Internet Service	-	-	693	693	-	0%
7050 · Computer Maintenance	74	-	-	-	-	#DIV/0!
7055 · Computer Supplies & Small Equip	40	35	288	288	-	0%
7100 · Telephone	1,147	906	1,304	1,304	-	0%
7105 · Advertising	-	-	20,000	20,000	-	0%
7115 · Public Relations	-	802	12,000	12,000	-	0%
7120 · Membership/Dues	-	-	115	115	-	0%
7175 · O/S Consultants	-	7,144	-	-	-	#DIV/0!
Total General & Administrative Expenses	1,302	11,085	35,507	35,507	-	0%
Building Overhead						
6015 · Janitorial Expense	328	311	318	334	16	5%
6020 · Heat	250	183	179	188	9	5%
6025 · Electricity	519	500	502	528	25	5%
6030 · Water/Sewer	47	45	52	55	3	5%
6035 · Outside Maintenance	215	134	131	137	7	5%
6040 · Building Repairs	54	151	272	286	14	5%
6045 · Bldg Mtnce Contracts	408	427	382	401	19	5%
6050 · Bldg Mtnce Supplies	26	24	31	32	2	5%
6065 · Bldg Insurance/Fees	138	260	184	193	9	5%
6070 · Building & Improvements Depre	584	552	551	596	44	8%
6075 · Furniture & Fixtures Depre	162	162	161	174	13	8%
7065 · Computers, Equip & Sftwre Depre	1,333	1,675	1,730	1,868	138	8%
Total Building Overhead Expenses	4,065	4,423	4,494	4,792	298	7%
Total Expenses	98,793	111,174	143,724	149,546	5,822	4%
Net Profit (Loss)	\$ (98,793)	\$ (111,174)	\$ (143,724)	\$ (149,546)	\$ (5,822)	4%

Utah State Bar
Preliminary FY2018 Budget
Based on Actual Results through 4/30/17
23 - Young Lawyers Division

	Actual FY 2015	Actual FY 2016	Projected FY 2017	Draft Budget FY 2018	\$ Change 2016 Projected vs 2017 Budget	% Change 2016 Projected vs 2017 Budget
Revenue						
4052 · Meeting - Sponsor Revenue	\$ 1,000	\$ 1,000	\$ 2,000	\$ 2,000	\$ -	0%
4081 · CLE - Registrations	-	1,480	-	-	-	#DIV/0!
4095 · Miscellaneous Income	110	-	-	-	-	#DIV/0!
4200 · Seminar Profit/Loss	3,268	4,019	4,019	-	(4,019)	-100%
Total Revenue	4,378	6,499	6,019	2,000	(4,019)	-67%
Expenses						
Program Services						
5001 · Meeting Facility-external only	5,250	-	-	-	-	#DIV/0!
5002 · Meeting facility-internal only	-	700	645	806	161	25%
5030 · Speaker Fees & Expenses	-	-	90	100	10	11%
5035 · Awards	1,262	895	2,082	3,000	918	44%
5037 · Grants/ contributions - general	5,100	4,091	2,450	3,500	1,050	43%
5060 · Program Special Activities	100	-	-	-	-	#DIV/0!
5062 · Law Day	366	760	760	760	-	0%
5063 · Special Event Expense	-	-	7,000	7,000	-	0%
5075 · Food & Bev-external costs only	18,408	17,806	15,000	14,000	(1,000)	-7%
5076 · Food & beverage - internal only	-	1,323	1,128	1,000	(128)	-11%
5085 · Misc. Program Expense	1,991	912	1,047	1,000	(47)	-5%
5702 · Travel - Lodging	3,477	4,516	5,000	5,000	-	0%
5703 · Transportation	-	-	-	-	-	#DIV/0!
5703 · Travel - Transportation	-	-	-	-	-	#DIV/0!
5703 · Travel - Transportation/Parking	2,805	2,262	5,000	4,000	(1,000)	-20%
5704 · Mileage Reimbursement	-	-	-	-	-	#DIV/0!
5704 · Travel - Mileage Reimbursement	538	48	-	-	-	#DIV/0!
5705 · Per Diems	-	-	-	-	-	#DIV/0!
5705 · Travel - Per Diems	-	-	-	-	-	#DIV/0!
5706 · Meals	-	-	-	-	-	#DIV/0!
5706 · Travel - Meals	478	134	134	500	366	273%
5805 · ABA Annual Meeting	4,586	6,639	5,000	5,000	-	0%
5810 · ABA Mid Year Meeting	5,798	5,340	6,000	5,000	(1,000)	-17%
5815 · Commission/Education	-	1,126	1,500	1,000	(500)	-33%
5855 · Bar Review	-	300	-	-	-	#DIV/0!
5865 · Retreat	-	721	5,000	5,000	-	0%
Total Program Services Expenses	50,159	47,574	57,836	56,666	(1,170)	-2%
Salaries & Benefits						
5510 · Salaries/Wages	435	399	124	130	6	5%
5605 · Payroll Taxes	34	33	16	17	1	5%
5650 · Retirement Plan Contributions	42	31	4	4	0	5%
5660 · Training/Development	400	-	-	-	-	#DIV/0!
Total Salaries/Benefit Expenses	911	463	143	151	7	5%
General & Administrative						
7025 · Office Supplies	157	88	202	200	(2)	-1%
7035 · Postage/Mailing, net	-	-	1	50	49	5219%
7040 · Copy/Printing Expense	101	218	340	300	(40)	-12%
7045 · Internet Service	27	59	-	100	100	#DIV/0!
7105 · Advertising	300	588	588	500	(88)	-15%
7140 · Credit Card Merchant Fees	-	39	34	34	-	0%
7175 · O/S Consultants	-	-	200	-	(200)	-100%
7195 · Other Gen & Adm Expense	487	-	-	-	-	#DIV/0!
Total General & Administrative Expenses	1,072	993	1,364	1,184	(180)	-13%
Total Expenses	52,143	49,029	59,344	58,000	(1,343)	-2%
Net Profit (Loss)	\$ (47,764)	\$ (42,530)	\$ (53,325)	\$ (56,000)	\$ (2,675)	5%

TAB
3

Rule 14-805. Practice Pending Admission-Reserved.

(a) For purposes of this rule:

(a)(1) "Active supervision" means:

(a)(1)(A) participating in and sharing responsibility for the representation of the client or has provided written agreement to provide supervision;

(a)(1)(B) ensuring that the lawyer being supervised conforms to the Rules of Professional Conduct and the Standards of Professionalism and Civility and assuming responsibility for any violation of the Rules of Professional Conduct by the lawyer being supervised; and

(a)(1)(C) making sufficient efforts to prevent any errors or misconduct on the part of the lawyer being supervised and taking immediate action to avoid or mitigate the consequences of any errors or misconduct that occur;

(a)(2) "Affiliated" means working in the same physical location or available to communicate remotely;

(a)(3) "Bar" means the Utah State Bar;

(a)(4) "Unlicensed lawyer" means a lawyer not licensed in Utah but licensed and in good standing in another United States jurisdiction;

(a)(5) "Utah law firm" means a business entity with an office in Utah consisting of one or more Utah licensed lawyers lawfully engaged in the practice of law.

(b) An unlicensed lawyer with a pending application to the Bar may provide legal services in Utah through an office or other systematic and continuous presence provided that he or she meets the requirements of this rule.

(c) To practice under this rule an unlicensed lawyer must:

(c)(1) reasonably expect to satisfy each requirement for admission by clear and convincing evidence as an Attorney Examination Applicant under Rule 14-704 or as a Motion Applicant under Rule 14-705;

(c)(2) have submitted to the Bar a complete application as defined in Rule 14-701(l) to sit for the Utah Bar Examination or to be admitted by motion;

(c)(3) have practiced law full-time in a jurisdiction where licensed for 60 of the 84 months immediately preceding the filing of the application for admission;

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(c)(4) have graduated from an ABA-approved law school;

(c)(5) have submitted a Practice Pending Admission Request Form to the Bar with the appropriate fee;

(c)(6) have passed a preliminary character and fitness review as prescribed by the Character and Fitness Committee;

(c)(7) have received from the Bar a Practice Pending Admission Certificate;

(c)(8) have an active law license in a U.S. jurisdiction;

(c)(9) be in good standing in all courts and jurisdictions in which he or she is admitted to practice;

(c)(10) be affiliated with a Utah law firm and actively supervised by a licensed Utah lawyer affiliated with the same law firm;

(c)(11) not have been subject to an order of attorney discipline within the preceding 84 months and not be subject to a pending grievance, complaint, disciplinary or disability investigation in any jurisdiction;

(c)(12) not have been previously denied admission to practice law on character and fitness grounds in any jurisdiction; and

(c)(13) inform all clients that the unlicensed lawyer is not licensed in Utah and affirmatively state in all written communications with the public, clients and other attorneys the following language: "Practice in Utah authorized from [date] to [date] under Rule 14-805 of the Rules Governing the Utah State Bar. Supervised by [name of Utah attorney], a member of the Utah State Bar".

(d) Eligibility to practice under this rule terminates upon the earlier occurrence of:

(d)(1) the Bar's admissions office's or character and fitness committee's decision to defer or not to approve the unlicensed lawyer's application;

(d)(2) the lapse of one year from the issuance of the Practice Pending Admission Certificate;

(d)(3) the unlicensed lawyer failing the Utah Bar Examination;

(d)(4) the unlicensed lawyer withdrawing his or her application for admission; or

(d)(5) the unlicensed lawyer failing to remain in compliance with subsections (c)(8) through (c)(13).

(e) Upon the termination of eligibility under (d), the unlicensed lawyer must immediately cease practicing law in Utah, and within ten days must:

(e)(1) provide written notice to the Bar's admissions office of the circumstances causing the termination of eligibility;

(e)(2) provide written notice to all courts, clients and opposing counsel in pending matters of the unlicensed lawyer's termination of authority to practice law in Utah; and

(e)(3) in order to protect the interest of his or her clients, transfer all files to the supervising attorney or other Utah licensed lawyer.

(f) The Bar does not have the authority to waive, modify, or extend any of the requirements or time limitations in this rule.

Alternative change to definition of "full-time"

(i) "Full-time Practice" means the Active and lawful Practice of Law for no fewer than 80 hours per month. Time spent on administrative or managerial duties, continuing legal education, or client development and marketing does not qualify as part of the required 80 hours of legal work;

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TAB
4

UTAH BAR COMMISSION MEETING AGENDA ITEM

Title: Lawyer of the Year Award Selection

Item: #2.3

Submitted by: John Baldwin

Meeting Date: May 12, 2017

ITEM/ISSUE:

To select the 2017 Lawyer of the Year Award recipient.

CRITERIA:

Presented to a Utah State Bar member who, over a long and distinguished legal career, has by their ethical and personal conduct, commitment and activities, exemplified for their fellow attorneys the epitome of professionalism; who has also rendered extraordinary contributions to the programs and activities of the Utah State Bar in the prior year.

NOMINEES:

1. Mark Moffat and Annie Taliaferro
2. Paul Simmons
3. Jeff Hunt

PAST RECIPIENTS AND NOMINEES:

Past Recipients	Other Nominations That Year
2016 Annette Jarvis Bruce Maak	Laura Dupaix, Kent Scott, Joan Watt, Fran Wikstrom
2015 Ron Yengich	Steven D. Peterson
2014 Charlotte Miller	Sharon Donovan, Ben Hathaway, Lyle W. Hillyard, Linda M. Jones, Janise Macanas, Karra J. Porter, Stuart H. Schultz, Jenifer L. Tomchak, Peggy A. Tomsick, Raymond Uno, Fran Wikstrom
2013 Peter Stirba	Janise Macanas, Brent Manning, Frank Carney
2012 Gary R. Crane	Brent Manning
2011 Robert B. Sykes	Francis M. Wikstrom, V. Lowry Snow
2010 Randy L. Dryer	
2009 Paul T. Moxley	Peter Stirba
2008 Charles R. Brown	Paul Felt, Dale Lambert, Reed Martineau, Lori Nelson
2007 Oscar McConkie	Charles R. Brown
2006 Max D. Wheeler	Sidney G. Baucom; Victoria Kidman, Max D. Wheeler, Ronald Yengich
2005 James S. Jardine	
2004 George B. Handy	
2003 Jay E. Jensen Rodney G. Snow	David G. Challed; David Jordan; L.S. McCullough, Jr.; John L. Valentine; Ronald J. Yengich; Stanley J. Preston; Kent B. Scott; Peter Stirba
2002 L. Brent Hoggan	
2001 Alan L. Sullivan	Stanley J. Preston; Peter Stirba; Kent B. Scott
2000 D. Frank Wilkins	
1999 Irene Warr	
1998 Leonard J. Lewis	
1997 Gayle F. McKeachnie	
1996 Dale A. Kimball	
1995 Gordon L. Roberts	
1994 Joseph Novak	
1993 William B. Bohling	
1992 Hardin A. Whitney Herschel J. Saperstein	
1990 Brian R. Florence Norman S. Johnson	

INFO ONLY:

DISCUSSION:

ACTION NEEDED: X

BUGDEN & ISAACSON, LLC
Trial Lawyers

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WALTER F. BUGDEN, JR.
TARA L. ISAACSON

April 21, 2017

Robert Rice, President
c/o John Baldwin, Executive Director
Utah State Bar
645 South 200 East
Salt Lake City, Utah 84111

Re: Recommendation for Lawyer of the Year

Dear Mr. Rice:

I am writing to recommend Mark Moffat and Annie Taliaferro to receive the lawyers of the year award from Utah State Bar. This defense team won an acquittal of Mr. Truman on the charge of murdering his wife.

The accomplishment of these two lawyers representing Mr. Truman cannot be overstated.

First, this defense team, against overwhelming odds, persuaded Judge Samuel McVey to grant the defendant a new trial. This alone required tremendous legal skill. The attorneys uncovered that the measurements at the crime scene were inaccurate, and grossly distorted the truth. When the inaccuracy of these measurements was brought to the attention of the medical examiner, the cause of death was changed from homicide to undetermined. Other trial errors were also brought to the attention of the trial court.

Then, at a second trial, Mr. Truman was acquitted by a jury of his peers.

This legal feat was accomplished against a media backdrop that portrayed the defendant as a killer.

Persuading a trial court to grant a new trial is a tremendous accomplishment. No judge wishes to overturn a jury's verdict and no judge wishes to try a case a second

April 21, 2017
Page 2

time. So this alone was a great achievement. But then the defense team succeeded in acquitting their client. Acquittals in murder cases are extraordinarily rare.

The exoneration of Mr. Truman only happened because of the exceptional dedication, tenacity, and skill of Ms. Taliaferro and Mr. Moffat.

Yours truly,

A handwritten signature in dark ink, appearing to read "Walt", with a horizontal line drawn through the middle of the signature.

Walter F. Bugden, Jr.

WFB:sw:ssh

DOUGLAS G. MORTENSEN *P.L.L.C.*
Advocate & Counselor at Law

Honorary Life Member & Past Pres.
Utah Association for Justice
(fka Utah Trial Lawyers Assoc.)

Admitted in Utah and Arizona
with Past *Pro Hac Vice*
Admissions in WY, WA, NV, IDA

May 5, 2017

Board of Utah State Bar Commissioners
c/o John C. Baldwin, Executive Director
645 South 200 East
Salt Lake City, Utah 84111

RE: PAUL M. SIMMONS – LAWYER OF THE YEAR

Dear Commissioners:

It occurs to me that because I submitted my nominating letter on plain paper, you may not have ready access to my contact information should you wish to reach me. This letter corrects that.

Two of the letters in my package were written by partners of Paul, on their firm's letterhead. You may note that the letterhead contains their names as part of the firm's title. You may also note that in advertisements in the Bar Journal and elsewhere, Paul is not pictured among the figure heads. While there are others in the firm who are also not similarly featured, Paul's absence is in my view conspicuous. He is highly valued there, as the recommendations indicate. His absence in the firm name and picture is just another indication that he doesn't care about publicity.

He is a leading light nonetheless and should be recognized for his nearly anonymous contributions to the bar and the community.

Respectfully,


Douglas G. Mortensen

Board of Utah State Bar Commissioners
 c/o John C. Baldwin, Executive Director
 645 South 200 East
 Salt Lake City, Utah 84111

May 1, 2017

RE: PAUL M. SIMMONS – LAWYER OF THE YEAR

Dear Commissioners:

In support of my nomination of Paul Simmons as Lawyer of the Year, I attach:

1. Photo of nominee;
2. Letter from the Honorable Bruce S. Jenkins;
3. Letter from Ruth Lybbert Renlund;
4. Letter from Francis J. Carney;
5. Letter of Ed Havas;
6. Letter from Colin King;
7. Letter from Annette Miller;
8. Photos at demonstrations;
9. Curriculum Vitae of Nominee appearing on his firm's website;
10. Address delivered to J. Reuben Clark Law Society on Feb. 14, 2014 in Kansas City, Missouri, followed by shorter version of message appearing as article in Summer 2014 edition of *Utah Trial Journal*: "Why We Do What We Do."

I am not nor ever have been affiliated with Paul's law firm. I am simply a lawyer who has been a recipient of his extraordinary kindness in sharing his knowledge and who has seen firsthand the selfless work he does in the community.

I nominate Paul Simmons because I believe lawyers in Utah should know there exists such a person as he: At once brilliant, diligent, skillful, self-effacing, and extraordinarily altruistic. He humbly goes about doing heroic things without almost anybody knowing. This is a nomination for "a body of work," not for a high profile, spectacular recent victory.

EDUCATION AND TRAINING

Paul entered law school at the age of 31 with some trepidation that he was too old to start a career in the law. At the time, he was married with two children. By the time he graduated, he was the father of four. Despite these circumstances, he found time to serve on the Utah Law Review and graduate number 1 in his class (University of Utah Law School class of 1985).

After clerking on two separate occasions for federal district court Judge Bruce S. Jenkins, Paul focused on his law practice in earnest.

NEAR ANONIMITY

Over the last three decades, Paul has distinguished himself as one of the ablest lawyers among those who practice in his field. Some on the commission may ask: "If he is such a heavyweight among lawyers in this state, why have I never heard of him?" The answer is: "Because he doesn't care if you've ever heard of him." Paul does not promote himself. He does not seek the lime light. He seeks only to do well and to do good and he succeeds at both almost entirely behind the scenes.

LEGAL CAREER

Paul is a partner in what is widely regarded as the most respected plaintiff law firm in Utah. When one of its founders was invited to help start the firm, he refused to come aboard unless Paul was willing to come with him. The firm's lawyers have achieved remarkable success in difficult cases on the frontiers of tort law. Paul has played a huge, but unseen role, in those notable achievements.

Last year, the Utah Supreme Court for the first time acknowledged the viability of a "reverse veil-piercing" doctrine in a case Paul's firm handled for a 15-year old girl who was required to enter an underage marriage at the direction of Warren Jeffs. *M.J v. Wisan*, 2016 UT 13. Paul wrote the plaintiff's brief. He has briefed and appeared in many other notable, less recent cases, a few of which are mentioned in the attached C.V. appearing on his firm's website. Mostly, he writes.

As a writer advocating for the aggrieved and injured, he is without peer. When the Utah Association for Justice decides to submit an amicus brief in cases having significant consequences for injury victims, he is the one asked to write it.

Paul has contributed articles to the *Utah Trial Journal* and the *American Bar Association's Litigation Section's Product Liability Newsletter*. He even now serves as one of four editors of the *Utah Trial Journal*.

Paul's legal skills have earned him compensation somewhere approximating their value. Though he could be driving a late model Mercedes Benz, he chooses to transport himself in a 2002 Toyota Camry with over 200,000 miles on it. Though he could be living in a mansion atop Salt Lake City's avenues, he chooses to live in a relatively modest home in Murray. Paul possesses every skill possessed by great lawyers except the skill of self-promotion, a skill he has shown no interest in developing.

It is a poorly kept secret that The Utah Association for Justice has listservs enabling its members (plaintiffs' lawyers) to seek help among themselves when they lack knowledge concerning a practical, substantive, or procedural issue. Many avail themselves of this benefit and more than a few have joined the association just to enjoy it. Listserv members would unanimously tell you that no one has provided greater help to them than Paul. His knowledge of the law is encyclopedic. He seems to know or can quickly find the answer to nearly every problem his colleagues have. And what he has or finds, he freely gives. The UAJ staff has documented that during his time on the listservs, Paul has engaged in over 900 responses. He rarely seeks help; but he frequently gives it.

Paul has been a mentor. The accompanying letters speak to that.

I believe Paul's mostly hidden "body of work" as a fee-earning lawyer qualifies him for the honor for which I nominate him. But that is not why I have nominated him. I want him to be honored for, among other things, the incredibly selfless service he provides disadvantaged Latinos and others in Salt Lake Valley's westside.

Service to the Latino Community and Others

Each week, Paul gives free, private piano lessons to Hispanic youths in West Valley. He currently has three students. His hope is that one of them will replace him as organist for the large congregation he has served over the past 7 years. Besides serving as organist for that congregation, he spends two hours every Sunday as pianist for the children's "Primary" organization. After services, he spends hours listening to people's problems and guiding them to the help they need.

One night each week, Paul and his wife teach English to adult refugees and asylum seekers anxious to become self-reliant in a country to which they have had to flee for safety.

On the *first* Tuesday of each month, a Community Legal Clinic is held at the LDS church's Welfare Square. Legal help is offered to all comers who seek advice on immigration, family, landlord-tenant, and other areas of law impacting the less advantaged. On the *second* Tuesday of each month, the Young Lawyers Division of the Utah State Bar offers free legal counselling at the Horizonte School for persons seeking information on bankruptcy, collection and credit issues. Paul regularly attends both these clinics, freely imparting what he knows. Sometimes he attends just to make himself more useful by broadening his own knowledge of those areas of law not a part of his law practice.

With the fear of deportation rampant among residents of Salt Lake's west side, Paul recently arranged for an immigration and criminal defense attorney to come out on a Friday evening and give advice to a large roomful of persons worried about what might become of their children if they, the parents, were deported.

Paul has prime tickets to Real Salt Lake soccer games. He often gives those tickets to his Latino friends, when he is not taking one of them with him.

I have known Paul to take an elderly woman to her doctor appointments and to help countless others, both members and nonmembers of his church, fill out food and commodity forms for welfare assistance.

Much of Paul's service has been done in the Mormon church's Inner City Project in which Paul serves as what is called a "self-reliance missionary." Many prominent lawyers in Utah serve their churches in high profile positions. Paul does not. Serving in the LDS church's Inner City Project is not a sought-after posting. The call is for one year. Some decline to serve. Others serve the required one-year tour of duty and receive an honorable discharge. Paul didn't get assigned; he volunteered. And he has re-upped 6 times, showing no inclination to stop.

Paul's service is more *through* his church, than *to* it. He is a missionary in the sense Mother Teresa, Albert Schweitzer, and Eric Bonhoeffer were missionaries.

BENEFACTOR

Paul's oldest child, Charlie, entered law, like Paul, with less concern about earning money than about helping the helpless and defending the powerless against the powerful. Paul was never prouder than watching in son argue a pro bono case for a prisoner before the Oregon Supreme Court. After Charlie was killed in a tragic automobile mishap and knowing of Charlie's respect for single mothers, Paul started a scholarship in Charlie's honor at Treasure Valley Community College in Ontario, Oregon.

One of Charlie's clients remains in prison in Oregon. Paul regularly corresponds with him. If he asks a favor, Paul does his best to help him and always writes back.

Paul and his wife have also funded a scholarship for single mothers in the Granite School District Young Parent program.

QUIET BUT NOT SILENT

The day after President Trump signed his first executive order restricting Muslim immigration, Paul and his wife joined others at the Salt Lake International Airport to demonstrated their opposition to the order. The following Saturday they marched up state street in a "Stand Up for Refugees" demonstration. Many lawyers may have bemoaned or felt embarrassed by the President's action but Paul, an Order of the Coif

scholar, is the only one I know who took the time and made the effort to demonstrate his feelings on the matter. He and Rebecca also participated with concerned scientists and environmentalists in the April 22 March for Science. (See attached photos).

All three of these events occurred on a Saturday, a day Paul generally spends at the office. His wife says the only way she can tell it's a Saturday and not a regular work day is that Paul wears a soccer shirt and goes to the office an hour later.

Both of Salt Lake's daily newspapers have published letters to the editor penned by Paul. For at least 8 years the bumper sticker on Paul's car has proclaimed ¡Obama!, a declaration not particularly popular in these parts and sometimes earning him a one finger salute by motorists with a contrary view. Again, Paul doesn't care. Though he is not militant, he has no reluctance to speak his mind and demonstrate his views, no matter how unpopular they may be.

In a bold response to a gratuitous comment made by a leading LDS official over the pulpit at general conference, Paul delivered a speech to the J. Reuben Clark Law Society entitled "Why We Do What We Do" which later appeared as an article in the *Utah Trial Journal*. It is attached.

SERVICE TO THE BAR

Some of Paul's bar service appears in the C.V. appearing on his firm's website. They include his current service on the Utah Supreme Court's Advisory Committee on Model Utah Jury Instructions and his 14 years of service on the U.S. District Court for the District of Utah's Advisory Committee on the Local Rules of Practice (from 1989 to 2003). He is the Association for Justice's liaison to the Bar's legislative affairs committee. His partner, Colin King, reports that he has also served on the Rule of Civil Procedure committee. Paul is the UAJ's representative with the American Association for Justice (AAJ)

Paul is so soft-spoken that if he were to win the Lawyer of the Year award and be invited to give an acceptance speech, the microphone would have to be turned up for people to hear his message. It would be short and if people didn't hear it, he wouldn't much care.

If Paul knew about this nomination (which he doesn't) and didn't win the honor, he wouldn't care. But I would. I submit there is not a lawyer in this state worthier of emulation than he is. Nothing makes me prouder to say I am a lawyer than knowing Paul is one too.

Respectfully,

A handwritten signature in black ink, reading "Douglas G. Mortensen". The signature is written in a cursive style with a large, looping initial "D" and a long, sweeping underline.

Douglas G. Mortensen

()

Paul M. Simmons



(/media/k2/items/cache/233826a67be66a810b23a26323oda62e_XL.jpg)

United States District Court

United States Courthouse
Salt Lake City, Utah 84101

Bruce S. Jenkins
U.S. Senior District Judge

Telephone
801-524-6507

April 24, 2017

Board of Bar Commissioners
Utah State Bar
645 South 200 East
Salt Lake City, Utah 84111

Re: Lawyer of the Year

Dear Commissioners:

I write to support the nomination of Paul M. Simmons as Lawyer of the Year.

Paul served twice as a clerk in my chambers from August, 1985 to October, 1988 and from December 1994 to January, 1996.


During those periods of service he demonstrated three of his enduring characteristics: He was very bright; he was unusually conscientious; and he was compassionate – he genuinely cared about those who appeared in Court.

Since moving into practice he has specialized in appellate work – with an occasional venture in a trial court. He is often sought after to help others on appeals, particularly in matters of complexity.

But that is only part of Paul Simmons. He has been a wonderful mentor-teacher of young Bar members – but not just Bar members – also refugees, minorities, Spanish speakers, and aspiring musicians. His quiet non-bar service provides a wonderful example for all of us.

It is the combination of superb lawyering and humane and selfless service that justifies his recognition as Lawyer of the Year.

Sincerely,



BRUCE S. JENKINS
U.S. Senior District Judge

cc: John Baldwin, Executive Director

**Ruth Lybbert Renlund
2473 E. Bramble Way
Salt Lake City, UT 84117**

April 26, 2017

It is my privilege to join the chorus of those who want to see Paul Simmons named as lawyer of the year. I practiced law with Paul for nearly 20 years and know that he is the finest of lawyers and loyalist of friends. When a case hit a roadblock, I called Paul for help. He knows the law, the rules of procedure, and the ethical obligations and spends countless hours helping others to know them as well. He has a gift to craft a well written, persuasive argument and is generous with his knowledge. He is hard working, self-deprecating and modest so many may not know of all the volunteer hours he spends helping others write briefs, research the law or find a case. He was and is so important to the firm that it was a standing refrain that when Paul retired, the rest of us would quit. He has my profound admiration and respect as a lawyer. But there is no better human being.

Although I am no longer practicing law, I frequently encounter lawyers who are quick to tell me that Paul is their mentor. And, Paul has mentored and continues to mentor more than lawyers. He actively serves the Salt Lake Hispanic community, teaching English, piano and providing pro bono legal advice. Paul mentors youth, helps the elderly and infirm. He simply sees a need and tries to help.

I am grateful to know Paul Simmons. He made me a better lawyer and a better person. I salute him for all he is doing in the community to use his time and skill to help others. There can be no better recipient for Lawyer of the Year than Paul Simmons.

Sincerely,


Ruth Lybbert Renlund

Francis J. Carney

FJC-ADR, LLC

1070 East 600 South, Salt Lake City, Utah 84102-3829

(801) 419-6380 • fcadr@gmail.com

April 23, 2017

Mr. John Baldwin
Executive Director, Utah State Bar
Utah Law & Justice Center
645 South 200 East
Salt Lake City, Utah 84111

Re: Lawyer of the Year (Paul Simmons)

Dear John:

I write in support of Paul Simmons for the Bar Commission's consideration as a candidate for "Lawyer of the Year."

I have known Paul for some thirty years. Originally when he was an associate at Suitter, Axland & Armstrong. Then later when he was a law clerk for Judge Bruce Jenkins and, later still, as an associate and partner at Dewsnup King & Olsen. I have also served with Paul on various Supreme Court committees, such as Model Utah Jury Instructions. Finally, Paul has spoken with me at many CLE presentations over the years for the Bar and for the Utah Association for Justice.

Paul has always been the one to turn to with any question on Utah constitutional or tort law. There's simply no one like him as a legal scholar. Paul is the go-to authority for all of us practicing in the tort field, and has been so for many years- freely, without quibble, he gives an answer, and it is nearly always the right one.

He has also been the intellect behind many of the plaintiff briefs on critical constitutional and governmental immunity decisions decided by the Utah Supreme Court over the past twenty-five years. His appellate writing is superb. And so are the many scholarly articles he has written for the Bar on tort and constitutional law issues. This is someone who has made a large contribution to the development of the law in Utah, and one who should be recognized more widely.

John Baldwin
April 23, 2017

I can't imagine that Paul is pushing for this award, if he even knows about it. He is a shy quiet person— one who is as far from the stereotypical trial lawyer as can be imagined. I don't know anyone who blows his own horn less than Paul does.

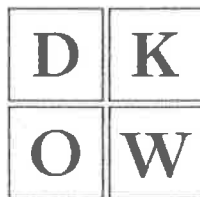
And so I am very pleased to highly recommend Paul Simmons for consideration as "Lawyer of the Year." Thank you.

Sincerely yours,

A handwritten signature in cursive script, appearing to read "Frank", written in dark ink.

Francis J. Carney

FJC/me



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David R. Olsen
Michael A. Worel *
Edward B. Havas
Alan W. Mortensen †
Paul M. Simmons
Peter W. Summerill
Charles T. Conrad ‡
Lance L. Milne §
Ricky E. Shelton

OF COUNSEL
Ralph L. Dewsnup

W. Brent Wilcox
(1940-1996)

also admitted in:
* Alabama; Georgia
† Colorado; Wyoming
‡ Washington
§ New Mexico; Texas

May 2, 2017

Mr. John Baldwin
Executive Director, Utah State Bar
Utah Law & Justice Center
645 South 200 East
Salt Lake City, Utah 84111

Re: Lawyer of the Year prospect, Paul Simmons

Dear John:

This letter is to encourage the selection of Paul Simmons as "Lawyer of the Year." Paul doesn't know I'm writing this; he would almost certainly be embarrassed if he did. One of the reasons he is suited for this honor is his humility and lack of self-aggrandizing ego.

I am pleased to have Paul as both a friend and colleague. He has been an integral and valuable part of our firm for many years, most of them as a shareholder and Corporate Secretary. As the firm President, I rely upon him for many tasks, each of which Paul executes with characteristic skill and follow-through. I also value his friendship and support, which Paul gives freely and warmly.

Paul distinguishes himself as a legal scholar of the first order. If Paul writes it – whether it's an article for a legal journal or just an e-mail – it's worth reading (and saving). Paul is unassuming, so soft-spoken I sometimes have to ask him to speak up. But what he says is worth having him repeat at audible volume. Those of us old enough to remember the E.F. Hutton commercials would find them aptly applied to Paul. When he speaks, one is well advised to shut up and listen, because his is inevitably a voice of knowledge, wisdom, and reason (and on occasion surprisingly pointed humor).

Paul is hard-working and industrious, putting in yeoman-like effort for DKOW. There is hardly a memorandum or brief that he doesn't at least put his mark on, if not create outright, and they – and our overall work-product as a consequence – is much the better for it.



John Baldwin, Esq.

May 2, 2017

Page 2

However, Paul is not content to just work hard at work. He gives much to the legal community as a whole, too. Paul serves on Supreme Court committees (such as that addressing Model Utah Jury Instructions), committees of the Utah Association for Justice (acting as liaison with the Bar's legislative affairs committee, among other activities), is the representative of the UAJ with the American Association for Justice (AAJ), and is sought after both as a speaker at CLE presentations and as a consultant on a wide variety of legal issues. There is seldom a question posed to Paul in answer to which he does not give wise counsel and learned input, sometimes after spending his time – a preciously scarce commodity – to conduct thorough research. He is not just a valuable resource, he is an invaluable one.

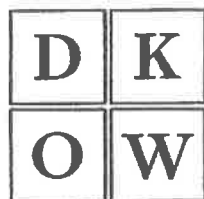
Paul also gives back to his community. He gives freely of his time to serve those with much less than most of us in the Bar are fortunate enough to enjoy. Paul has worked as an inner-city missionary, offers advice and assistance to immigrants so desperately in need of it, and supports in a number of ways – with his time, his knowledge, his expertise, and his money – causes of justice, fairness, and equality in many forms and forums. I'm not sure how he has the time and energy to do as much as he does, but I know he has touched many lives for the better over the years through his tireless efforts.

I can think of no one who has developed, completely without the goal of such recognition, a reputation more universally admired and respected – and well-earned – than Paul. I can think of no one more deserving of the honor, and therefore highly recommend Paul Simmons for "Lawyer of the Year." Thank you for considering my comments. Please do not hesitate to contact me with questions.

Very Truly Yours,



Edward B. Havas
President



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(1940-1996)

also admitted in:
* Alabama; Georgia
† Colorado; Wyoming
‡ Washington
§ New Mexico; Texas

cking@dkowlaw.com

May 2, 2017

Mr. John Baldwin
Executive Directory, Utah State Bar
Utah Law & Justice Center
645 South 200 East
Salt Lake City, Utah 84111

Re: Lawyer of the Year (Paul Simmons)

Dear John:

I write in support of Paul Simons for the Bar Commissions' consideration as a candidate of "Lawyer of the year."

I have known Paul for over twenty years, as his partner and his friend. At David Olsen's insistence, I begged Bruce Jenkins to allow Paul, his senior clerk, to come work for us. He agreed. David, having worked with Paul at Suttter, Axland & Armstrong, knew how invaluable Paul was.

Paul's superb writing and brilliant legal scholarship and analysis was instrumental in raising our firm from a very good plaintiff's tort firm to the best plaintiff's tort firm, one widely respected by adversaries, judges and justices.

Paul has become an icon in Utah tort law. His reputation as having the right analysis is widespread. He has provided innumerable free appellate brief assistance to many lawyers outside our firm, authored many fine amicus briefs, and authored many critical scholarly articles on torts, constitution law, legislation and evidence.

Paul has contributed hundreds, if not thousands, of hours to pro bono legal work. He has also contributed similar numbers of hours in community service work for immigrants and other needing assistance with the myriad problems and challenges facing our local immigrant populations.

I have tried a lot of complex difficult trials over the years, and Paul has always provided brilliant analysis and insights.



Page 2

I have served with Paul for years on the Civil Procedure Rules Committee and Model Utah Jury Instructions. Also, Paul has spoken with me at many CLE presentations over the years for the Bar and for the Utah Association for Justice.

Paul Simmons richly deserves this recognition, for a lifetime of superb contributions to the federal and state courts, the Utah State Bar, his colleagues and his community.

Yours very truly,

Carl P. King



May 2, 2017

Board of Utah State Bar Commissioners
c/o John C. Baldwin, Executive Director
645 South 200 East
Salt Lake City, Utah 84111

RE: PAUL M. SIMMONS – LAWYER OF THE YEAR NOMINATION

Dear Commissioners:

My name is Annette Miller. I am a former paralegal of the firm of Dewsnap, King & Olsen, where Paul M. Simmons has been a partner for more than 18 years.

Initially, I met Paul while working as a legal secretary for Stewart M. Hanson, Jr. and Charles P. Sampson – a famous duo in the business of law, at Suitter Axland & Hanson. It has been my privilege for nearly 22 years to know Paul during this time in both of these very fine firms.

I don't believe it is an exaggeration to state that Paul is and has been the one constant and brilliant light amongst some of the most indomitable legal minds in all of Salt Lake City and beyond. He is a man of honor, tremendous courage, and unfailing efforts to see that his trial team is prepared from the beginning to the end. His judgment is superior. He is a voice of reason and clarity in a world of loud voices. In a room filled with such voices, his "soft," but powerful voice and opinions are respected over many others because of his background, knowledge and integrity.

Paul's experience in the law and his knowledge of its many moving parts are foundationally stellar. He is the keeper of all new news and laws in our firm, all new cases, all new court procedures, and anything else that will enhance our ability to serve others in this business effectively. As a Board Member of Dewsnap, King & Olsen, Paul is highly respected by his partners and is beloved by the staff, who have at one time or another all benefitted from his guidance many, many times. He is our go-to person, one on whom we can rely to keep confidences. If an attorney needs additional information on a legal issue, the famous cry is "Where's Paul? Go get Paul." In our office, Paul is affectionately titled PTG, meaning Paul The Great, by Colin P. King.

Paul is the champion of the underserved in the legal community in his "off" hours, if ever he has such hours. He takes great pains and delight in helping persons who have difficult and challenging cases, working hard to find legal solutions to tough problems. He writes to people in prison and gives them words of hope and encouragement. He continues to help some of the families that benefitted from his eldest son, Charles' counsel as an attorney before Charles was tragically killed in an automobile accident in the State of Oregon. Paul renders personal aid and support to

Board of Utah State Bar Commissioners
 c/o John C. Baldwin, Executive Director
 May 2, 2017
 Page Two

many of those same families who were indigent.

No one dislikes Paul. From my standpoint as a senior paralegal, he is revered by all. He is, without question, the last man standing in the office at night. His door is nearly always open day or night. There are hundreds of lawyers who have benefitted from the information he gives and/or finds for his fellow lawyers on the various List Serves. He is loyal. He is famous for finding answers to weird or complicated legal matters. He has none of the common lawyerly faults. He rarely forgets anything.

Every good thing that has happened to me in my involvement in the business of law over the years, and every good thing that has happened in developing a nonprofit to help refugees and immigrants currently, has come from Paul's efforts to keep me informed. He is in the know about everything! He was the first to offer a donation to my organization, and the first to physically show up to help with breakfasts to feed the poor, and to offer valuable information about ESL training. He continues to offer pertinent information about the protection of people with whom I work. I am not the only person that he has helped over the years – starving students, starving immigrants, persons starving for knowledge of the law, and mentoring all of us and other attorneys from within and outside the office.

Paul may be embarrassed from such attention. He does nothing to ingratiate himself, only to build, lift and teach others. He is a wonderful friend, husband, and father. He is devoted to his family and each of their causes, including even their associates' and friends' causes. It never stops. He a great human being, and one of the finest lawyers this fair city will or may ever know.

He deserves to be attorney of the year. He truly is attorney of any hour, day, week or year.

Respectfully submitted,

Annette Miller/By DSM w/ PDA

Annette R. Miller
 Founder

Unity in the Community

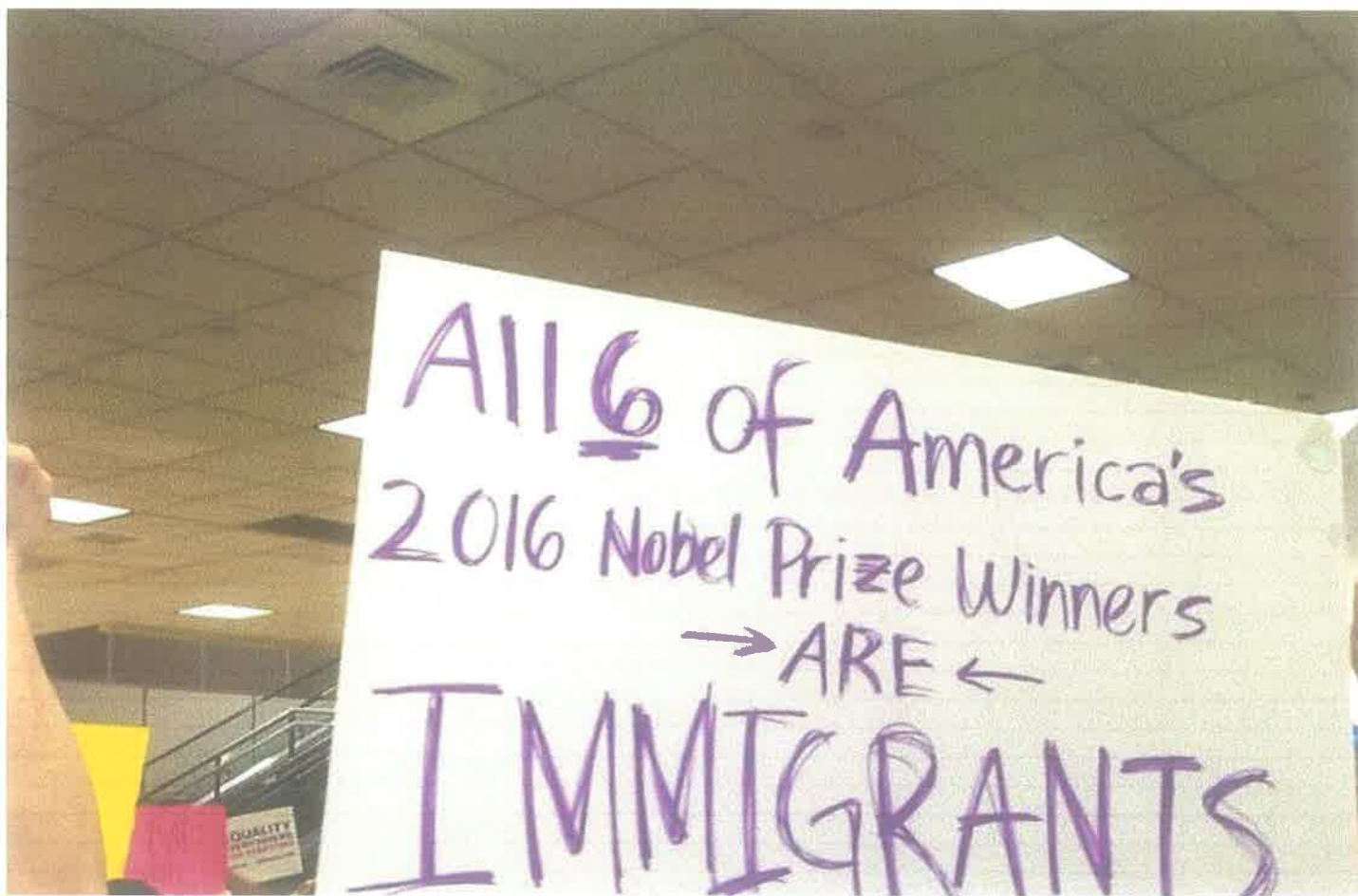
801-231-3149

annette@unityinthecommunity.net



From: Becky Simmons
Sent: Friday, April 28, 2017 5:22 PM
To: Doug Mortensen
Subject: Here they are

To be honest, we did not make, nor are we carrying the posters in these photos. And I am not tech savvy enough to send them any way but this way.



Photo/Video

Feeling/Activity

Trending

Paul Simmons commented on this



Rebecca P Simmons with Paul Simmons
April 23

- National Rifle Association
President Trump calls Elizabeth Warren
'Pocahontas' in NRA... [bostonglobe.com](#)
- The Pentagon
Friendly fire investigation launched in deaths
of 2 Army Rangers in... [chicago Tribune.com](#)
- Lonzo Ball
Nike, adidas, Under Armour walk away from
Lonzo Ball... [sportsnews.com](#)
- [See More](#)

Married to Paul Simmons for 41 Years

See Relationship

Sponsored

Create Ad

This kind gentleman, has been by my side, and had my back, and wiped my tears, and made me laugh for 41 years now. 43 if you count back to the day I met him. I won the lottery of love in this life.



Rebecca P
April 23

Like Comment
With a comment

People You May Know
Mark Tamm
Add Friend

View more comments



Write a comment

Eric Hunter commented on this



Eric Hunter shared a memory
April 25 at 9:15am

Yeah, this was longer than 6 years ago! Great group of people. I am a lucky youngest! Yeah, Still younger than everyone.

6 Years Ago
See Your Memories



Jeff Hunter with Katherine Hunter and 6 others
April 25, 2011

The young man with the winning smile in the middle



BE KIND
REMIN
TO 2001
Missions Don't Observe

PEACE
LOVE
UNITY

MAKE
AMERICA
KIND
AGAIN

NO
HATE
NO
FEAR



(l)

Paul Simmons has enjoyed an extensive career as both an attorney and a legal scholar, with expertise in complex brief writing and appeals. He has briefed or argued more than 50 appeals in Utah and federal courts. Among the more significant reported decisions in which he has appeared as counsel include *Normandeau v. Hanson Equipment*, 2009 UT 44, 215 P.3d 152; *Judd v. Drezga*, 2004 UT 91, 203 P.3d 135; *Parks v. Utah Transit Auth.*, 2002 UT 55, 53 P.3d 473; *Sanns v. Ford Motor Co.*, 2004 UT App 203, 94 P.3d 301; and *House v. Armour of Am., Inc.*, 886 P.2d 542 (Utah Ct. App. 1994), *aff'd*, 929 P.2d 340 (Utah 1996).

Mr. Simmons has edited and contributed articles to the Utah Trial Journal and the American Bar Association's Litigation Section's Products Liability Newsletter. Among his publications are articles focusing on medical malpractice verdicts, strict products liability and comparative fault, pain pump litigation, and appeals strategies at trial, to name a few.

He currently serves on the Utah Supreme Court's Advisory Committee on Model Utah Jury Instructions and previously served for 14 years on the U.S. District Court for the District of Utah's Advisory Committee on the Local Rules of Practice, from 1989 to 2003.

He is widely recognized by his peers and by other professionals in being named to many of the nation's most highly recognized listings of top lawyers including Best Lawyers in America, Martindale-Hubbell® Bar Register of Preeminent Lawyers, Mountain States Super Lawyers, and Utah Business magazine's listing of the Legal Elite. He also has received awards from various professional groups including the Utah Trial Lawyers Association (Super Star award) and the Utah State Bar, for service to the Litigation Section's Voir Dire project, and as co-recipient of the Bar's Pro Bono Lawyer of the Year and Outstanding Mentor awards.

First admitted to practice in all Utah state courts more than 30 years ago, he has been admitted to the bars of federal courts throughout the country, including the U.S. Supreme Court, U.S. Court of Appeals for the 8th and 10th Circuits, and the U.S. District Courts for the Eastern & Western Districts of Arkansas, District of Colorado, Western District of Michigan, and the District of Utah.

A native of California, Paul graduated magna cum laude from Brigham Young University in 1977 with a Bachelor of Arts degree in English and a minor in Spanish. After working as an editor for several years, he returned to school and received his juris doctorate from the University of Utah College of Law in 1985, where he was a member of the Utah Law Review and the Order of the Coif legal honor society.

Mr. Simmons is also a member of the American Bar Association and its Litigation and Torts and Insurance Practice sections. In addition, he is a member of and serves on the Board of Governors of the American Association for Justice (AAJ) and the Utah Association for Justice (UAJ).

**Remarks to J. Reuben Clark Law Society
Personal Injury Section Meeting**

February 15, 2014
Kansas City, Missouri

First, I would like to thank you. My wife and I serve as service missionaries in the LDS Church's Inner City Project in Salt Lake City. We often have to try to find professionals to help members in need. As a rule, I've found that the attorneys have not been as eager to help as some of the other professionals I've dealt with, such as dentists. But I understand that the members of the J. Reuben Clark Law Society freely give their time and expertise when called upon. This is a great blessing to the people we serve, and we thank you for it.

Aaron originally asked me for suggestions for topics he could discuss at this meeting. I suggested two. Only later did he twist my arm and get me to agree to be the presenter.

I'd like to talk just briefly about the first topic I suggested. It was the proposed changes to the Federal Rules of Civil Procedure. 2 (5) As you may know, the Judicial Conference of the United States' Advisory Committee on Civil Rules has proposed significant changes to the federal rules, based in part on the 2011 changes to the Utah Rules of Civil Procedure. The principles on which the proposed changes are based are increased cooperation among attorneys, proportionality of discovery, and active judicial case management. The most significant changes are in the areas of discovery—reducing the presumptive limit of oral depositions from 10 to 5, and limiting the presumptive number of hours for a deposition from 7 to 6; reducing the presumptive limit of interrogatories from 25 to 15, including all discrete subparts; and imposing a presumptive limit on requests for admissions of 25, including discrete subparts, where no limit existed before. The rule would also reduce the time for service of process from 120 days to 60 days. Like most changes in statutes and rules since I've been practicing, the effect if not the purpose of these proposals, I believe, is to make it harder for injured people to have access to justice. Most of these changes have been solutions in search of a problem, a desire to impose a one-size-fits-all standard in response to anecdotal evidence. The rules should provide a flexible framework for securing "the just, speedy, and inexpensive determination of every action."ⁱ Instead, these proposals provide rigid limits that encourage attorneys to try to hide the ball. The result will be a return to the days of "trial by ambush," which the federal discovery rules were originally meant to prevent.

Because the plaintiff has the burden of proof, the draconian limitations on discovery give the defense a distinct advantage. Cooperation among counsel may be a laudable goal, but counsel's first obligation is to his or her client, and if the client can gain an advantage by not cooperating, by not disclosing damaging documents or information, at least, not without a fight, then most attorneys will choose to protect their client over some ideal of cooperation.

The proposed changes have the added problem that they will require more satellite litigation over what is or is not proportional and when the court should allow exceptions to the standard discovery. Under the proposed federal rules, it is not clear who has the burden of proof on such issues, and different judges will have different

attitudes towards how much deviation from the rules to allow. On another level I see the proposed changes, with their strict and rigid deadlines, along with such changes as *Iqbal* and *Twombly*, as returning the courts to an earlier era of code pleading, hypertechnicalities, making a man an offender for a word, and “gotcha’s.”

I bring this up because today is the last day to comment on the proposed changes.^{3 (2)} So if you are so inclined, I would encourage you when you get back to your hotel this afternoon or on your flight home this evening to drop a line to the rules committee and let them know how you feel about the proposed changes. The address is rules_comments@ao.uscourts.gov. But I’m afraid this train has probably already left the station. As with many proposed rule changes, I think the skids have been greased before the rules are ever put out for public comment.

The other topic I suggested to Aaron was a broader topic, taking a step back and asking, Why do we do what we do?

How many of you represent injured individuals? How many of you represent defendants? Anyone not in one of those two categories? Anyone in both? As you’ve probably figured out by now, I have a bias towards the plaintiff’s side of the v. I realize that there are contrasting points of view. As a bishop friend of mine used to say, “It’s a pretty thin pancake that only has one side.” So if you defense attorneys would like a rebuttal, maybe you could volunteer to present at the conference next year. While most of my remarks will be directed to why we plaintiffs’ attorneys do what we do, I hope my remarks will also give you defense lawyers some food for thought.

The genesis for this topic was two-fold. First, I realized that many of you would be members of The Church of Jesus Christ of Latter-day Saints, and lawyers have traditionally been held in low esteem by many in the Church, including in the Church hierarchy. I’m sure you’re all familiar with Brigham Young’s opinion that lawyers were 4(2)

“an outrage upon the feelings of every honest, law abiding man” and “a stink . . . in the nostrils of every Latter-day Saint.”ⁱⁱ That didn’t prevent Brigham Young from hiring lawyers, however, when he needed them.ⁱⁱⁱ

More recently, lawyers, in particular, personal injury lawyers, have been singled out for opprobrium at General Conference. Twice in General Conferences, in 1987 and again in 2011, Elder Boyd K. Packer told the story of “a saintly patriarch” he knew named John who, as a young man, lost his wife as a result of medical negligence in delivering their first child. The doctor had been treating an infection at another home when he was called to John’s home to deliver the baby. There were complications with the delivery. It was an emergency situation, and the doctor apparently forgot to wash his hands before treating the new mother, who died some days later from the very infection the doctor had been treating that night at another home. John let his grief fester until a “wise leader,” John’s stake president, told him, “John, leave it alone.^{5 (1)} Nothing you do about it will bring her back. Anything you do will make it worse. John, leave it alone.”^{iv} Elder Packer noted, 6 (2) “Today, no doubt, he [John] would have been pressed to file a malpractice suit, as though money would solve anything.” A cynical colleague of mine once asked, What else would you expect the former chairman of the board of an insurance company^v to say? Elder Packer omitted from his latest

retelling of this story another line that was in his 1987 talk: “And there are lawyers who would see in his pitiable condition only one ingredient—money!”

I asked why we do what we do, and certainly one of the answers has to do with money. We all need to make a living and support our families. The legal profession is an honorable profession, and for some it can be a lucrative profession as well.

I remember Gerry Spence coming to speak at the University of Utah when I was in law school there. ⁷ He told about how he came to do what he did. He told about his early career as an insurance defense attorney and how he had an epiphany where he saw maimed and injured people who needed his help. While he was speaking, I had an epiphany of my own. There was something about the way he told the story that made me think his first epiphany was that he could make a whole lot more money representing plaintiffs than he could representing insurance companies for \$35 an hour, or whatever the going rate was back then for insurance defense work (and he could wear fringe jackets while doing it). I don’t mean to impugn Mr. Spence’s motives, because I have heard him speak several times since, and I believe he truly does feel his clients’ pain and sincerely wants to help them. He has been willing to take on causes that aren’t always popular or profitable. I just tell this story to acknowledge the truth that money is a motivating factor in all our lives. But hopefully that’s not the only reason you have to get up in the morning and go to work. If so, you may want to consider a career change. It might be like Mr. Spence’s, changing from the “dark side” to the side of truth and justice (or vice versa), or it may be like a law-school classmate of mine who decided he would use his law degree to teach seminary and help people on the side with adoptions and other legal issues. Or you may want to go into mergers and acquisitions.

I recently read James Stewart’s account of the demise of Dewey LeBoeuf, where, to bring about the merger of their two firms, LeBoeuf guaranteed Dewey’s co-chairman, a mergers-and-acquisitions specialist, \$6 million a year in the new firm.^{vi}

It is probably no secret that many plaintiffs’ attorneys like nice things, expensive things. But if that were the only reason we did what we do, we could easily burn out or, as some have, succumb to the temptation to cut ethical corners to make another buck.

I haven’t always worked on the plaintiff’s side. At the first firm I worked at out of law school, I did insurance defense work. Although I find plaintiff’s work much more rewarding, I have enjoyed tort law, whichever side I have been on. That is because of the nature of tort law. It deals with pretty much the entirety of human experience. There are an infinite number of ways that people can get injured, so we get to deal with new and interesting fact patterns almost every day. I remember when I came back to law school after my first summer of clerking and met a classmate who had spent the summer at an insurance defense firm. She said, “I had no idea how many things can go wrong when you stick your head under the hood of a car.”

Tort law is also one of the last refuges of the common law, although even tort law has been severely limited by legislative action in the last 30 years.

The common law is based on the principle that it is unfair to treat similar facts differently on different occasions. Lord Coke 8 (3) called it “nothing else but reason” and the “perfection of reason”;^{vii} “the most generall and ancient law of the realme” that “has no controuler in any part of it, but the” highest court in the land;^{viii} “the surest sanctuary, that a man should take, and the strongest fortresse to protect the weakest of

all.”^{ix} 9 Learned Hand described it as “a monument slowly raised, like a coral reef, from the minute accretions of past individuals, of whom each built upon the relics which his predecessors left, and in his turn left a foundation upon which his successors might work.”^x Because it is made by judges and not legislatures, it is insulated somewhat from politics. Big money has much less influence with courts than it does with legislatures. You don’t often see lobbyists wining and dining judges.

The common law can also be quicker to evolve. As a 19th-century New York court noted, 10 “It is the peculiar merit of the common law that its principles are so flexible and expansive as to comprehend any new wrong that may be developed by the inexhaustible resources of human depravity.”^{xi}

Because of its flexibility, tort law has “widened the circle of civil justice in redressing harms”^{xii} “Tort law shapes public policy by punishing the irresponsible” and holding them accountable.^{xiii} Many of the societal harms eradicated or lessened in the last century came about not as a result of government regulators but as a result of the work of trial lawyers, trial lawyers who had the patience and persistence to keep asking tough questions in the face of efforts to stonewall them and to wade through rooms full of documents to find the smoking gun.

11 It was through the work of trial lawyers that we discovered that the asbestos industry knew of the risks of inhaling asbestos fibers in the 1930s yet kept the public and their own employees in the dark about the risks they were being exposed to for decades.
12

13 It was through the work of trial lawyers that we learned that the Big Tobacco executives who testified before Congress were lying when they said that their product was not addictive. It was also as a result of the work of trial lawyers that the financial burden of caring for tobacco smokers was reallocated from the public to the tobacco companies, through the multibillion-dollar settlement the states reached with Big Tobacco in 1997.^{xiv}

14 It was through the work of trial lawyers, in cases like *Grimshaw v. Ford Motor Company*,^{xv} that it was discovered that Ford had put the Pinto on the market with full knowledge that a chassis bolt was placed in a position where it was likely to puncture the fuel tank on rear impacts but concluded that the cost of making a design change (\$137 million) would be more than settling an estimated 180 wrongful death and 180 serious burn cases a year.^{xvi} Was Ford ever wrong in its assessment. But it took a jury to tell them that we value human life more than the inconvenience of a design change.

15 It was through the work of trial lawyers that healthcare was made safer by the institution of such practices as post-surgery sponge and instrument counts, more rigorous screening of physicians’ credentials when applying for hospital privileges, and other protocols and practices designed to reduce errors in the ER and the OR.^{xvii}

16 It was through the work of trial lawyers (and the only paralegal to have a movie based on her life, Erin Brockovich) that the dangers of chemicals in our water supplies came to light.

17 It was through the work of trial lawyers that dangerously defective products like “the Dalkon Shield and Copper-7 intrauterine devices associated with reproductive injuries, high-absorbency tampons linked to toxic shock syndrome, oral contraceptives

that caused kidney failures, and silicone-gel breast implants with a high rupture rate” were taken off the market, improving the health of women.^{xviii}

My partner Colin King 18 tried the first Dalkon Shield case in Utah. The Dalkon Shield intra-uterine device “resulted in one of the most infamous and tragic episodes of American Contraceptive experiments at the expense of women.”^{xix} Dr. Hugh Davis, the inventor of the Dalkon Shield and one of the three owners of the Dalkon Corporation (the name of which was derived from their names—Davis, Lerner, and Cohn), testified before Congress about the hazards of oral contraceptives and proclaimed the Dalkon Shield the birth-control method of the future without disclosing to Congress that he was the inventor of the device and had a financial interest in its success. Dr. Davis also wrote papers for the American Journal of Obstetrics and Gynecology and the Journal of the American Medical Association lauding the device without disclosing his interest in it.

The problem with the device was that, unlike other IUDs, it did not have a solid, monofilament “tail.” Instead, the tail was made of 200-400 individual filaments inside a thin plastic sheath open at both ends, which acted as a wick, allowing bacteria-containing liquids to enter the sterile uterine cavity. A.H. Robins, which bought the product from Dalkon, knew of this problem about the time it started marketing the product but did nothing to correct the problem. Some 3 years later, the FDA required Robins to stop selling the devices, but Robins did not warn women or their doctors about the dangers of the device not did it recall them for another ten years.

In the meantime, tens of thousands of women who used the device became infected and sterile, and many died. It was a trial attorney, Bradley Post, who was assigned as the lead plaintiff’s attorney in a multidistrict litigation in federal district court in Wichita, who doggedly pursued the documents and depositions necessary to ferret out the hidden story of the Dalkon Shield.^{xx}

There are many more examples of how tort lawsuits make our country better. Here are a couple of books you may want to check out if you’re interested in learning more.^{xxi} 19

The point I wish to make is that “[t]ort law, like sunlight, acts as a disinfectant by exposing hidden threats to the public welfare.”^{xxii} Plaintiffs’ attorneys act as sort of private attorneys general in punishing and deterring social misconduct, making the world a safer place for everyone.^{xxiii} As the 20 Honorable Walter Rice of the Southern District of Ohio once said,

thanks to the efforts of lawyers, members of *our* profession, the consumer in this country enjoys a greater level of product safety and reliability from the products he buys than any consumer anywhere in the world and, thanks to the efforts of lawyers, the water we drink and the air we breath [I might add, with the possible exception of Utah’s Wasatch Front] is cleaner and fresher than at any time since the dawn of the Industrial Revolution, two centuries ago. As a result, we will succeed in leaving a habitable world to those that follow. Lawyers have accomplished all of this; society, if left to its own devices, would not have done so.^{xxiv}

To realize the value of what we do, you may want to imagine what the world would be like without us. 21 Randi McGinn, an excellent trial lawyer from New Mexico, did just that in an article in the *Utah Trial Journal*. The lead read:

We are reporting from Utah on the lives of its citizens 10 years after the Legislature outlawed all civil lawyers, defrocked the judges and boarded up courthouses from St. George to Logan.

Looking back, it has been a wonderful decade for manufacturers of dangerous products, environmental polluters, shoddy contractors and drunk drivers.^{xxv}

I said at the beginning that there were two things that prompted me to choose this topic. One was Elder Packer's story. I'm not saying that the stake president's advice to John in that case wasn't the right advice. I'm just saying that people who have been wronged do have legitimate reasons to bring lawsuits. Nothing they can do will bring back a loved one, but they may be able to make things better for those who come after by bringing a lawsuit.

The second thing that prompted this topic was my first trip to Kansas City, almost thirty years ago. I was fresh out of law school and clerking for Judge Bruce Jenkins, at the time the Chief Judge of the United States District Court for the District of Utah. The Tenth Circuit assigned Judge Jenkins to sit on a case in Topeka, Kansas. The case had been brought by the Phelps family, whom some of you may be familiar with. I think they had named as defendants every federal and state-court judge in Kansas, so of course all of the federal judges in Kansas had to recuse themselves. After one hearing, we found ourselves with some extra time on our hands before our return flight to Utah. I suggested that we go visit Sumner Elementary School in Topeka. 22 You may recall that Sumner Elementary was the school that little Linda Brown tried to enroll in. She was turned down by the Topeka Board of Education, forcing her to attend the all-black Monroe School, which was farther from her home. Her father, Oliver Brown, joined the class action lawsuit that eventually made it to the Supreme Court, under the name *Brown v. Board of Education of Topeka*,^{xxvi} the case that outlawed racial segregation in education in this country. 23

We were met at the school by the principal, who showed us around the school and introduced us to a class. The judge and I later remarked about how far we as a nation had come in 30 years. The judge observed that the student population was now a veritable rainbow coalition, with children of all races and colors, and I noted that the principal was a woman, not only a woman, but a black woman with a hyphenated surname. (As an aside, after our visit to Sumner Elementary, we crossed the Missouri River and took in some of the Church history sites on this side of the river, including Adam-ondi-Ahman. 24 25 I told the judge that it is going to need a lot more parking spaces and bathroom facilities if Adam is going to visit his posterity there before the Second Coming.) Our visit to Sumner Elementary School is now almost as far removed as *Brown v. Board of Education* was at that time. We've come a long way, but we still have a long way to go to be a perfectly fair, just, and safe society. There is much work still to be done. For example, a new study recently came out that suggested that hospital errors are the third leading cause of death in this country, after heart disease and cancer.^{xxvii}

Traditionally, the law has been conservative; it has followed social changes rather than led them. Too often throughout history, the law has been used as a tool of the rich and powerful to crush common men and women. 26 As Anatole France said, "The law,

in its majestic equality, forbids the rich as well as the poor to sleep under bridges, to beg in the streets, and to steal bread.” I think also of the New Deal and the Supreme Court’s “Four Horsemen,” 27 who frustrated President Roosevelt’s social and economic policies until Justice Roberts’s 28 “switch in time that saved nine.” Lawyers may have been responsible for *Brown v. Board of Education*, but they were also responsible, a century earlier, for *Plessy v. Ferguson*, which made *Brown v. Board of Education* necessary.

But in the case of civil rights, attorneys were at the forefront of the movement to secure equal justice for all. They were on the right side of history. I think of attorneys like 29 Thurgood Marshall, Spottswood W. Robinson III, Jack Greenberg, and other attorneys of the NAACP Legal Defense and Education Fund, Inc. (the so-called Inc. Fund), who took the fight for justice to the courts, often at great personal sacrifice and risk, and eventually won. These attorneys are heroes to me.

So are the attorneys who have led the fights against asbestos exposure, Big Tobacco, the Dalkon Shield, the contamination of drinking water by the dumping of toxic chemicals, exploding Pintos and exploding tires, and even too hot McDonald’s coffee. We can take pride in our profession and in the good we do, not just for our clients but for society as a whole.

The Elder Packers of the world may think that all plaintiffs are out for only one thing—to get as much money as they can. The corporate world, the chambers of commerce, and other forces of Big Money have fostered this view by advertising campaigns assailing what they call the “lawsuit lottery.” 30 If people realized what they would have to go through to “win” the “lawsuit lottery”—die or lose a loved one or a limb or a bodily function, live in debilitating the pain the rest of their lives—no one would choose to enter it, and no one voluntarily does.

When many of our clients come to us for the first time, they say they never dreamed that they would ever seek out a lawyer, that they are not the kind of person who would want to sue anyone. But eventually they do, and, in my experience, it is because they want three things.

First, they want someone to acknowledge that they’ve been wronged and someone to say, “I’m sorry.” 31 Sometimes that is all they want.

A colleague of mine related the story of finishing a mediation in a wrongful death, medical malpractice action. The plaintiffs had lost their 63-year-old husband and father through clear negligence. After the mediator confirmed the terms of the settlement, the defense lawyers stood up to go. The young lawyer who had represented the hospital, perhaps because he was young and had not become jaded yet, looked my colleague’s clients directly in the eye and said how sorry he was for what had happened to their father and husband. My friend described what happened next: “The daughters melted. One of them became so emotional that she had to lean against the wall and sit down on the floor. She kept saying, ‘that’s all I needed to hear.’ They just wanted to hear someone apologize for what had happened to the man who meant so much to them.”^{xxviii} Studies have shown that doctors who admit their mistakes to patients and sincerely apologize are much less likely to be sued than those who try to hide from their mistakes.

Second, most plaintiffs want fair and just compensation. They're not out to win any lottery. They just want to know that, when all the fuss has died down, when they are no longer able to work, they and their families will be taken care of. Let me give you some examples.

Our last two trials each resulted in a \$4 million verdict. In the first case, tried in federal court in Utah, a bulldozer tooth 32 ripped through our client's face when it was shot out of a rock crusher because a part that was designed to prevent such accidents 33 didn't do its job. We would have settled the case in the low six figures, but the defendant never offered more than \$25,000. It stubbornly refused to admit that the part that it represented in its manual would have caused the jaws to open, safely releasing the stuck dozer tooth, was defective. It took a jury to tell the company it had a problem.

In the second case, tried in an Alabama state court, the defendant's insurer turned down a policy-limits offer of \$300,000.

A week ago a colleague in Ogden got a \$956,000 jury verdict on a case involving a low-speed parking lot collision with about \$30,000 in medical bills. The insurer had turned down an offer to settle the case for the policy limits of \$25,000. This attorney has had three trials in three years because the carrier would not timely pay policy limits, and in all three cases she got verdicts much higher than the policy limits, from 5 to 35 times as high.

Are these cases of greedy plaintiffs or of greedy insurance companies, refusing to accept responsibility and trying to save a few bucks?

The third thing most plaintiffs want is that no one else ever have to go through what they've been through. They want the defendant to change its ways, to fix the problem that led to their injury in the first place. That has been one of the great uses of tort law throughout history, and it continues to be so.

Not all defendants are evil or heartless. I'd like to share two more stories with you of some good coming from tragic events.

In one case, handled by my partner David Olsen, our young client was severely injured when a 34 Werner truck driver plowed into the back of his mother's car on I-15 in central Utah because the driver was going way too fast in a blinding snow storm. Our client will be confined to a wheelchair and needs a machine to talk for him for the rest of his life. After the case settled, Werner asked if our client would be willing to appear in a Werner safety training video to show drivers the consequences of not obeying the law and company policies.

In the other case, handled by Colin King, our client lost his wife when their new home was blown up. A subcontractor used a pneumatic "pig" to bore a line under the frozen yard for a phone line to go in. 35 The "pig" broke the 2-inch neighborhood gas line. Questar, the local natural gas company, found and fixed the leak but failed to rule out residual gas under the ground that could seep into the home's basement. A Questar serviceman took the young wife and mother back into the home to light the furnace pilot light without first ascertaining whether there was natural gas in the basement. The flame ignited the gas, and the house exploded, killing our client's wife and the serviceman. 36 Questar, as an express condition of the settlement, implemented a written policy and changed its procedures for detecting and removing underground gas

leaks and for the evacuation and re-introduction of people in dangerous areas. 37 In implementing these changes and settling the case early in the litigation process, Questar acted as a responsible company. As another aside, at the mediation, the parties were \$76,000 apart. The Questar vice-president who attended the mediation agreed to split the difference and pay \$38,000 more. Two days later, my partner, Colin, received a call from his wife saying that the gas company had left a shut-off notice on their door, 37 threatening to shut off their gas unless they paid the amount past due. The amount past due? \$38,000. The shut-off notice was signed by the vice-president and Questar's in-house and litigation attorneys. Who says defense attorneys don't have a sense of humor?

Finally, I'd like to mention one other reason we do what we do, particularly those of us who represent individuals. To illustrate this point, I'd like to use a story about my son Charlie, 38 who was an attorney in Oregon. He was killed in an auto accident on his way to court four and a half years ago. He also represented individuals, but most of his clients were prisoners. Most of his practice consisted of petitions for post-conviction relief. He loved what he did, and his clients loved him because they could tell how much he cared about them. After he died, we received a letter from one of his clients, a convicted murderer by the name of Robert King. He said:

The first time I met with your son . . . I asked him "Charles, do you know what Hebrews 13:1-3 says?" and Charles in his most excellent manner smiled and said, "No Mr. King but I have a strong feeling you're about to tell me what Hebrews 13:1-3 says."

I said to Charles "Hebrews 13:1-3 states 38

Let brotherly love continue. Do not forget to entertain strangers for by so doing some have unwittingly entertained angels.

Remember the prisoners as if chained with them

Charles then said, "Mr. King, are you an angel?" (and he smiled).

I said, "No, Sir, I am not an angel, but I am a prisoner."

Then Charles smiled again and [said], "No, seriously, Mr. King. If you are an angel you can tell me, and the attorney-client privilege assures you, I will tell no one."

Doing personal injury work, I feel like I have "unwittingly entertained angels." Not all plaintiffs are angels, and not all angels are on the plaintiffs' side. Corporations may be people, as the Supreme Court has said, but I've yet to meet a corporation that I mistook for an angel. There is something very satisfying about representing human beings. We often see the best in people. We deal with people who have been refined by suffering but who have managed to come through their ordeal without rancor or bitterness. In our line of work, we have the opportunity to bear one another's burdens, mourn with those that mourn, and comfort those who stand in need of comfort.^{xxx} To my list of heroes, I can also add our clients.

In closing, I would like to reaffirm what 40 Martin Luther King, Jr., said: "The arc of the moral universe is long, but it bends toward justice."^{xxx} May we do our part to see that it does so. Thank you.

-
- i. FED. R. CIV. P. 1.
 - ii. 3 JOURNAL OF DISCOURSES 240, *quoted in* EDWIN BROWN FIRMAGE AND RICHARD COLLIN MANGRUM, ZION IN THE COURTS: A HISTORY OF THE CHURCH OF JESUS CHRIST OF LATTER-DAY SAINTS 1830-1900 at 17 (1988), and in Dallin H. Oaks, *Unfolding in Time*, CLARK MEMORANDUM 15, 16 (Spring 2013).
 - iii. *See, e.g., Godbe v. Young*, 1 Utah 55 (1876); *Pratt v. Young*, 1 Utah 347 (1876); *In re Cain's Heirs v. Young*, 1 Utah 361 (1876).
 - iv. Boyd K. Packer, "Guided by the Holy Spirit," *Ensign*, May 2011, p. ____; Boyd K. Packer, "Balm of Gilead," *Ensign*, Nov. 1987, p. _____. *See also* Donald L. Hallstrom, "Turn to the Lord," *Ensign*, May 2010, p. ____ (contrasting stories of two families who lost children, one of whom blamed the doctor and wanted to get revenge, their acrimony and bitterness eventually causing four generations of the family to fall away from the Church, and Elder Hallstrom's grandparents, whose grief led them to focus on righteous living, and advising members that, if they feel they've been wronged, to deal with the matter directly and turn to the Lord; "[n]ever let an earthly circumstance disable you spiritually").
 - v. Elder Packer was the chairman of the board of the Utah Home Fire Insurance Co., according to an old Church website.
 - vi. *See* James B. Stewart, *Annals of Law: The Collapse*, NEW YORKER 80, 87 (Oct. 14, 2013).
 - vii. *The First Part of the Institutes of the Laws of England, or, A Commentary on Littleton* (F. Hargrave & C. Butler ed., 19th ed. 1832) (1628), *quoted in* "Common Law," WIKIQUOTE, http://en.wikiquote.org/wiki/Common_law (last visited Feb. 6, 2014).
 - viii. *Id.* (Legal Classics Library ed. 1823), *quoted in* <http://www.commonlaw.com/Coke.html> (last visited Feb. 6, 2014).
 - ix. *Institutes of the Laws of England*, Second Part, vol. 1, Notes to ch. XXIX of the Charter [Magna Carta], ¶ 1391, *quoted in* "Common Law," WIKIQUOTE, http://en.wikiquote.org/wiki/Common_law (last visited Feb. 6, 2014).
 - x. Book Review, 35 Har. L. Rev. 479, 479 (1922) (reviewing Benjamin N. Cardozo's *The Nature of the Judicial Process*), *quoted in* "Common Law," WIKIQUOTE, http://en.wikiquote.org/wiki/Common_law (last visited Feb. 6, 2014).
 - xi. *Johnson v. Girdwood*, 7 Misc. 651, 28 N.Y.S. 151 (1894) *aff'd*, 39 N.E.21 (1895),

quoted in THOMAS H. KOENIG & MICHAEL L. RUSTAD, IN DEFENSE OF TORT LAW 4-5 (2001).

xii. KOENIG & RUSTAD, *supra* note __, at 9.

xiii. *Id.* at 3.

xiv. *See id.*

xv. 174 Cal. Rptr. 348 (Cal. Ct. App. 1981).

xvi. *See* Jamie Kitman, *Noise, Vibration & Harshness: Tort Reforms for Dummies*, AUTOMOBILE __ (____).

xvii. *See id.* at 3.

xviii. *See* KOENIG & RUSTAD, *supra* note __, at 2.

xix. Colin King, *My First Trial: The Dalkon Shield Case*, UTAH TRIAL J. 16 (Fall 2004).

xx. *See id.* at 16-17. Only later was it discovered that general counsel for Robins had destroyed corporate reports and memos adverse to Robins and that Robins had set up and funded secret microbiological studies through its insurer–Aetna–to keep the results, which were extremely damaging to Robins, safe from discovery. “The conspiracy backfired and resulted in additional punitive damage verdicts.” *Id.* at 20.

xxi. CARL T. BOGUS, WHY LAWSUITS ARE GOOD FOR AMERICA (2001); THOMAS H. KOENIG & MICHAEL L. RUSTAD, IN DEFENSE OF TORT LAW (2001).

xxii. *Id.* at 3.

xxiii. *See id.* at 9.

xxiv. Walter Rice, *Have You Heard the Latest Lawyer Joke (or Is There a Cure for Modern Day Lack of Professionalism and Civility?)*, UTAH TRIAL J. 23, 24 (Summer 1999).

xxv. Randi McGinn, *What Would Utah Be Like? Imagine a World Without Lawyers*, UTAH TRIAL J. 21 (Summer 2002) (reprint of an article from the August 1995 UTAH TRIAL JOURNAL).

xxvi. 347 U.S. 483 (1954).

xxvii. John T. James, *A New, Evidence-based Estimate of Patient Harms Associated with Hospital Care*, 9 J. PATIENT SAFETY 122, 122 (2013).

xxviii. G. Eric Nielson, *A Letter to the Trial Journal: A Reminder of What We Do*, UTAH TRIAL J. 4, 5 (Fall 2002).

xxix. Cf. BOOK OF MORMON, Mosiah 18:8-9.

xxx. Quoted in John Craig, *Wesleyan Baccalaureate Is Delivered by Dr. King*, HARTFORD COURANT, June 8, 1964, at 4.

Tort law is also one of the last refuges of the common law, although even tort law has been severely limited by legislative action in the last thirty years.

The common law is based on the principle that it is unfair to treat similar facts differently on different occasions. Lord Coke called it "nothing else but reason" and the "perfection of reason"⁵ "the surest sanctuary, that a man should take, and the strongest fortress to protect the weakest of all."⁶ Learned Hand described it as "a monument slowly raised, like a coral reef, from the minute accretions of past individuals, of whom each built upon the relics which his predecessors left, and in his turn left a foundation upon which his successors might work."⁷ Because it is made by judges and not legislatures, it is relatively insulated from politics. Big money has much less influence with courts than it does with legislatures. You do not often see lobbyists wining and dining judges.

The common law can also be quicker to evolve. As one court noted, "It is the peculiar merit of the common law that its principles are so flexible and expansive as to comprehend any new wrong that may be developed by the inexhaustible resources of human depravity."⁸

Because of its flexibility, tort law has "widened the circle of civil justice in redressing harms...."⁹ "Tort law shapes public policy by punishing the irresponsible"¹⁰ and holding them accountable. Many of the societal harms eradicated or

lessened in the last century came about not as a result of government regulators but as a result of the work of trial lawyers; trial lawyers who had the patience and persistence to keep asking tough questions in the face of efforts to stonewall them and to wade through rooms full of documents to find the smoking gun.

It was through the work of trial lawyers that we discovered the asbestos industry knew of the risks of inhaling asbestos fibers in the 1930s yet kept the public and their own employees in the dark about the risks they were being exposed to for decades.

It was through the work of trial lawyers that we learned that the Big Tobacco executives who testified before Congress were lying when they said their product was not addictive. It was also through the work of trial lawyers that the financial burden of caring for tobacco smokers was reallocated from the public to the tobacco companies, through the multibillion-dollar settlement the states reached with Big Tobacco in 1997.¹¹

It was through the work of trial lawyers, in cases like *Grimshaw v. Ford Motor Company*,¹² that it was discovered that Ford had put the Pinto on the market with full knowledge that a chassis bolt was placed in a position where it was likely to puncture the fuel tank on rear impacts but concluded the cost of making a design change (\$137 million) would be more than settling an estimated 180 wrongful death and 180 serious burn cases a year.¹³ Was

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Ford ever wrong in its assessment. But it took a jury to tell them that we value human life more than the inconvenience of a design change.

It was through the work of trial lawyers that health-care was made safer by the institution of such practices as post-surgery sponge and instrument counts, more rigorous screening of physicians' credentials when applying for hospital privileges, and other protocols and practices designed to reduce errors in the emergency and operating rooms.¹⁴

It was through the work of trial lawyers (and the only paralegal to have a movie based on her life, Erin Brockovich) that the dangers of chemicals in our water supplies came to light.

It was through the work of trial lawyers that dangerously defective products like "the Dalkon Shield and Copper-7 intrauterine devices associated with reproductive injuries, high-absorbency tampons linked to toxic shock syndrome, oral contraceptives that caused kidney failures, and silicone-gel breast implants with a high rupture rate" were taken off the market, improving the health of women.¹⁵

The point I wish to make is that "[t]ort law, like sunlight, acts as a disinfectant by exposing hidden threats to the public welfare."¹⁶ Plaintiffs' attorneys act as private attorneys general in punishing and deterring social misconduct, making the world a safer place for everyone.¹⁷

I said at the beginning that there were two things that prompted

me to choose this topic. One was Elder Packer's story. The second thing was my first trip to Kansas City, almost thirty years ago. I was fresh out of law school and clerking for Chief Judge Bruce Jenkins of the United States District Court for the District of Utah. The Tenth Circuit assigned Judge Jenkins to sit on a case in Topeka, Kansas. The case had been brought by the Phelps family, whom some of you may be familiar with.¹⁸ I think they had named as defendants every federal and state-court judge in Kansas, so all of the federal judges in Kansas had to recuse themselves. After one hearing, we found ourselves with some extra time before our return flight to Utah. I suggested that we go visit Sumner Elementary School in Topeka. You may recall that Sumner Elementary was the school in which little Linda Brown tried to enroll. She was turned down by the Topeka Board of Education, forcing her to attend the all-black Monroe School, which was farther from her home. Her father joined the class action lawsuit that eventually made it to the Supreme Court under the name *Brown v. Board of Education of Topeka*,¹⁹ the case that outlawed racial segregation in education in this country.



School integration. Barnard School, Washington, D.C. Courtesy the Library of Congress.

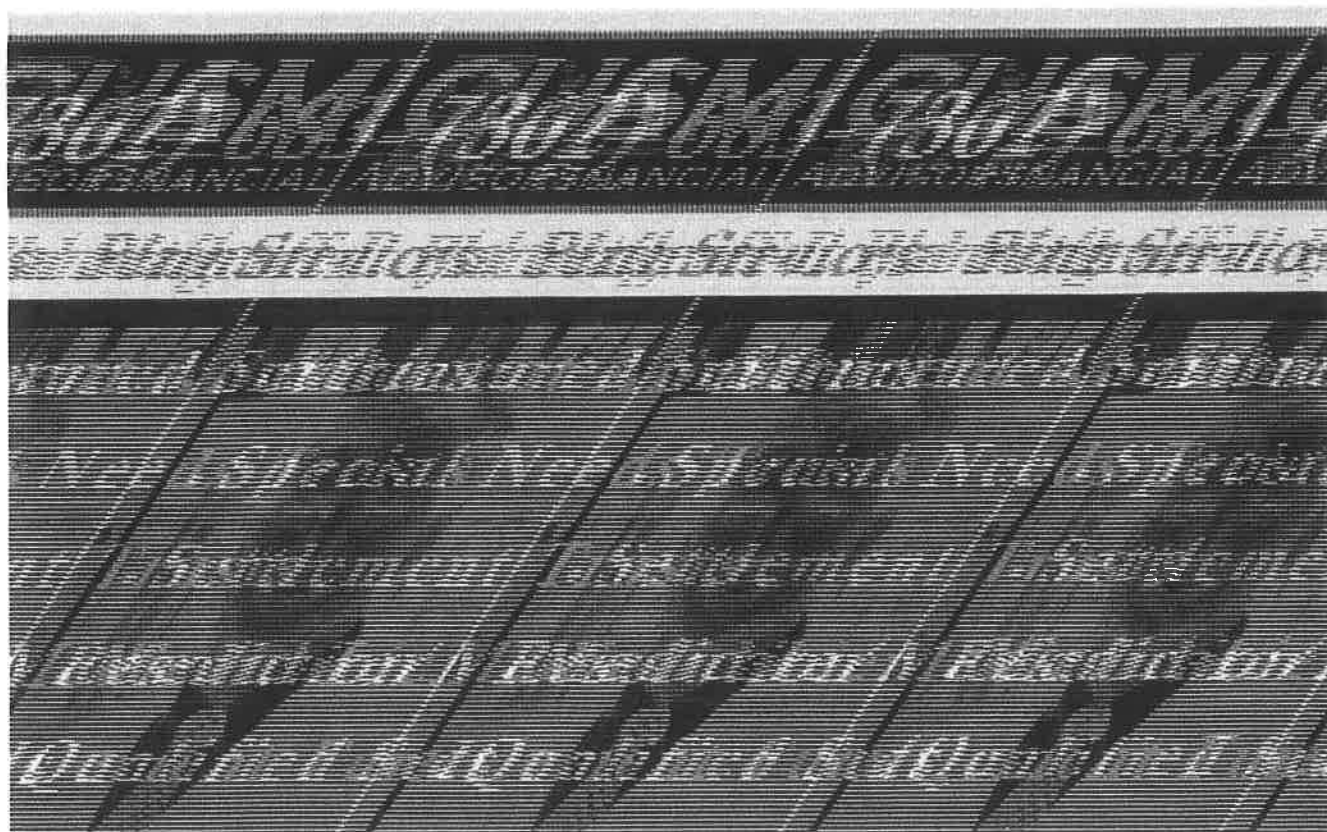
We were met at the school by the principal, who showed us around the school and introduced us to a class. The judge and I later remarked about how far we as a nation had come in thirty years. The judge observed that the student population was now a veritable rainbow coalition, with children of all races and colors, and I noted the principal was a woman, not only a woman, but a black woman with a hyphenated surname. Our visit to Sumner Elementary School is now almost as far removed as *Brown v. Board of Education* was at that time. We have come a long way, but we still have a long way to go to be a perfectly fair, just, and safe society. There is much work still to be done. For example, a recent study suggests that hospital errors are the third leading cause of death in this country, after heart disease and cancer.²⁰

Traditionally, the law has been conservative; it has followed social changes rather than led them. Too often throughout history, the law has been used as a tool of the rich and powerful to crush common people. Lawyers may have been

responsible for *Brown v. Board of Education*, but they were also responsible, a century earlier, for *Plessy v. Ferguson*, which made *Brown v. Board of Education* necessary.

But in the case of civil rights, attorneys were at the forefront of the movement to secure equal justice for all. They were on the right side of history. I think of attorneys like Thurgood Marshall, Spottswood W. Robinson III, Jack Greenberg, and other attorneys of the NAACP Legal Defense and Education Fund, Inc. (the so-called Inc. Fund), who took the fight for justice to the courts, often at great personal sacrifice and risk, and eventually won. These attorneys are heroes to me.

So are the attorneys who led the fights against asbestos exposure, Big Tobacco, the Dalkon Shield, the contamination of drinking water by the dumping of toxic chemicals, exploding Pintos and exploding tires, and even too hot McDonald's coffee. We can take pride in our profession and in the good we do, not just for our clients but for society as a whole.



The Elder Packers of the world may think all plaintiffs are out for only one thing – to get as much money as they can. The corporate world, the chambers of commerce, and other forces of Big Money have fostered this view by advertising campaigns assailing what they call the “lawsuit lottery.” If people realized what they would have to go through to “win” the “lawsuit lottery” – die or lose a loved one or a limb or a bodily function or live in debilitating pain the rest of their lives – no one would choose to enter it, and no one voluntarily does.

When many of our clients come to us for the first time, they say they never dreamed they would ever seek out a lawyer, that they are not the kind of person who would want to sue anyone. But eventually they do, and, in my experience, it is because they want three things.

First, they want someone to acknowledge that they have been wronged and someone to say, “I am sorry.”

Sometimes that is all they want.²¹ Studies have shown doctors who admit their mistakes to patients and sincerely apologize are much less likely to be sued than those who try to hide from their mistakes.

Second, most plaintiffs want fair and just compensation. They are not out to win any lottery. They just want to know, when all the fuss has died down, when they are no longer able to work, they and their families will be taken care of. Let me give you some examples.

Our last two trials each resulted in a \$4 million verdict. In the first case, tried in federal court in Utah, a bulldozer tooth ripped through our client's face when it was shot out of a rock crusher because a part that was designed to prevent such accidents did not do its job. The client would have settled the case in the low six figures, but the defendant never offered more than \$25,000. It stubbornly refused to admit the part that it represented in its manual

would have caused the jaws to open, safely releasing the stuck dozer tooth, was defective. It took a jury to tell the company it had a problem.

In the second case, tried in an Alabama state court, the defendant's insurer turned down a policy-limits offer of \$300,000.

Recently a UAJ member in Ogden got a \$956,000 jury verdict on a case involving a low-speed parking lot collision with about \$30,000 in medical bills. The insurer had turned down an offer to settle the case for the policy limits of \$25,000. This attorney has had three trials in three years because the carrier would not timely pay policy limits, and in all three cases she secured verdicts much higher than the policy limits, from 5 to 35 times as high.

“There is something very satisfying about representing human beings. ... We deal with people who have been refined by suffering but who have managed to come through their ordeal without rancor or bitterness.”

Are these cases of greedy plaintiffs or of greedy insurance companies, refusing to accept responsibility and trying to save a few bucks?

The third thing most plaintiffs want is that no one else will ever have to go through what they have

been through. They want the defendant to change its ways, to fix the problem that led to their injury in the first place. That has been one of the great uses of tort law throughout history, and it continues to be so.

Finally, I would like to mention one other reason we do what we do. To illustrate this point, I would like to use a story about my son Charlie, who was an attorney in Oregon. He was killed in an auto accident on his way to court four and a half years ago. He also represented individuals, but most of his clients were prisoners. Most of his practice consisted of petitions for post-conviction relief. He loved what he did, and his clients loved him because they could tell how much he cared about them. After he died, we received a letter from one of his clients, a convicted murderer by the name of Robert King. He said:

The first time I met with your son...I asked him "Charles, do you know what Hebrews 13:1-3 says?" and Charles in his most excellent manner smiled and said, "No Mr. King but I have a strong feeling you're about to tell me what Hebrews 13:1-3 says."

I said to Charles "Hebrews 13:1-3 states: Let brotherly love continue. Do not forget to entertain strangers for by so doing some have unwittingly entertained angels."

Remember the prisoners as if chained with them. ...

Charles then said, "Mr. King, are you an angel?" (and he smiled).

I said, "No, Sir, I am not an angel, but I am a prisoner."

Then Charles smiled again and [said], "No, seriously, Mr. King. If you are an angel you can tell me, and the attorney-client privilege assures you, I will tell no one."

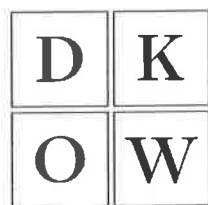
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In closing, I would like to reaffirm what Martin Luther King, Jr., said: "The arc of the moral universe is long, but it bends toward justice."²³ May we do our part to see that it does so.

Meeting of the J. Reuben Clark Law Society on February 15, 2014, in Kansas City, Missouri.

2. 3 JOURNAL OF DISCOURSES 240, quoted in Edwin Brown Firmage and Richard Collin Mangrum, *Zion In The Courts: A History Of The Church Of Jesus Christ Of Latter-Day Saints 1830-1900* at 17 (1988), and in Dallin H. Oaks, *Unfolding in Time*, CLARK MEMORANDUM 15, 16 (Spring 2013).
3. See, e.g., *Godbe v. Young*, 1 Utah 55 (1876); *Pratt v. Young*, 1 Utah 347 (1876); *In re Cain's Heirs v. Young*, 1 Utah 361 (1876).
4. Boyd K. Packer, *Guided by the Holy Spirit*, ENSIGN, May 2011, 30, 32; Boyd K. Packer, *Balm of Gilead*, ENSIGN, Nov. 1987.
5. *The First Part of the Institutes of the Laws of England, or, A Commentary on Littleton* (F. Hargrave & C. Butler ed., 19th ed. 1832) (1628), quoted in *Common Law*, WIKIQUOTE, http://en.wikiquote.org/wiki/Common_Law (last visited Feb. 6, 2014).
6. *Institutes of the Laws of England*, Second Part, vol. 1, Notes to ch. XXIX of the Charter [Magna Carta], & 1391, quoted in *Common Law*, WIKIQUOTE, http://en.wikiquote.org/wiki/Common_Law (last visited Feb. 6, 2014).
7. *Book Review*, 35 Harv. L. Rev. 479, 479 (1922) (reviewing Benjamin N. Cardozo's *The Nature of the Judicial Process*), quoted in *Common Law*, WIKIQUOTE, http://en.wikiquote.org/wiki/Common_Law (last visited Feb. 6, 2014).
8. *Johnson v. Girdwood*, 7 Misc. 651, 28 N.Y.S. 151 (1894) *aff'd*, 39 N.E.21 (1895), quoted in Thomas H. Koenig & Michael L. Rustad, *In Defense Of Tort Law* 4-5 (2001).
9. KOENIG & RUSTAD, *supra* note 8, at 9.
10. *Id.* at 3.
11. See *id.*
12. 174 Cal. Rptr. 348 (Cal. Ct. App. 1981).
13. See E.S. Grush & C.S. Saunby, *Fatalities Associated with Crash Induced Fuel Leakage and Fires* 6-7 (Ford interoffice memo), available online at <http://lawprofessors.typepad.com/tortspdf/files/FordMemo.pdf>.
14. See KOENIG & RUSTAD, *supra* note 8, at 3.
15. See *id.* at 2. See also Colin King, *My First Trial: The Dalkon Shield Case*, UTAH TRIAL J. 16 (Fall 2004).
16. KOENIG & RUSTAD, *supra* note 8, at 20.
17. See *id.* at 9. See also, e.g., Randi McGinn, *What Would Utah Be Like? Imagine a World Without Lawyers*, UTAH TRIAL J. 21 (Summer 2002) (reprint of an article from the August 1995 UTAH TRIAL JOURNAL); Carl T. Bogus, *Why Lawsuits Are Good For America* (2001).
18. The family patriarch, Fred Phelps, a lawyer and pastor, recently passed away. In noting his passing, *Time* magazine described him as a "[p]aragon of hate" and "a colossal jerk." *Milestones: Fred Phelps*, TIME, Apr. 7, 2014, at 25.
19. 347 U.S. 483 (1954).
20. John T. James, *A New, Evidence-based Estimate Of Patient Harms Associated With Hospital Care*, 9 J. PATIENT SAFETY 122, 122 (2013).
21. See the experience recounted in G. Eric Nielson, *A Letter to the Trial Journal: A Reminder of What We Do*, UTAH TRIAL J. 4, 5 (Fall 2002).
22. Cf. BOOK OF MORMON, Mosiah 18:8-9.
23. Quoted in John Craig, *Wesleyan Baccalaureate Is Delivered by Dr. King*, HARTFORD COURANT, June 8, 1964, at 4.

1. This article is adapted from remarks given at the Personal Injury Section



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† Colorado; Wyoming
‡ Washington
§ New Mexico; Texas

Mr. John Baldwin
Executive Directory, Utah State Bar
Utah Law & Justice Center
645 South 200 East
Salt Lake City, Utah 84111

Re: Lawyer of the Year (Paul Simmons)

Dear John:

I write in support of Paul Simons for the Bar Commissions' consideration as a candidate of "Lawyer of the year."

I have known Paul for over twenty years, as his partner and his friend. At David Olsen's insistence, I begged Bruce Jenkins to allow Paul, his senior clerk, to come work for us. He agreed. David, having worked with Paul at Suitter, Axland & Armstrong, knew how invaluable Paul was.

Paul's superb writing and brilliant legal scholarship and analysis was instrumental in raising our firm from a very good plaintiff's tort firm to the best plaintiff's tort firm, one widely respected by adversaries, judges and justices.

Paul has become an icon in Utah tort law. His reputation as having the right analysis is widespread. He has provided innumerable free appellate brief assistance to many lawyers outside our firm, authored many fine amicus briefs, and authored many critical scholarly articles on torts, constitution law, legislation and evidence.

Paul has contributed hundreds, if not thousands, of hours to pro bono legal work. He has also contributed similar numbers of hours in community service work for immigrants and other needing assistance with the myriad problems and challenges facing our local immigrant populations.

I have tried a lot of complex difficult trials over the years, and Paul has always provided brilliant analysis and insights.



I have served with Paul for years on the Civil Procedure Rules Committee and Model Utah Jury Instructions. Also, Paul has spoken with me at many CLE presentations over the years for the Bar and for the Utah Association for Justice.

Paul Simmons richly deserves this recognition, for a lifetime of superb contributions to the federal and state courts, the Utah State Bar, his colleagues and his community.

Your very truly,

John P. King



RAY QUINNEY & NEBEKER

May 8, 2017

VIA EMAIL
john.baldwin@utahbar.org

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

Re: *Lawyer of the Year Award*

Dear John:

I hereby nominate Jeff Hunt for the Lawyer of the Year Award. Jeff is a veteran litigator in Utah, and a long-time friend of the Utah Bar. His contributions to our profession and our Bar are countless.

Jeff practices in the area of commercial litigation, with a particular emphasis on First Amendment, media and intellectual property law. He has more than 25 years of experience litigating complex commercial cases. Notwithstanding his busy litigation schedule, he is a nationally recognized First Amendment media lawyer, having represented every major news organization in Utah as well as many national organizations. He is a leading public advocate for open government and helped draft Utah's Government Records Access and Management Act. He frequently litigates on behalf of the news media and individuals seeking public access to government proceedings.

His Bar services are many, including serving as past President of the Salt Lake County Bar Association, past co-chair, Utah State Bar Mentor Training and Resource Committee and he is a regular presenter at Bar Conventions and CLEs.

For these reasons, I nominate Jeff Hunt for Lawyer of the Year Award.

Sincerely,

RAY QUINNEY & NEBEKER


Robert O. Rice

ROR/mm
1413114

Robert O. Rice
ATTORNEY AT LAW

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TAB
5

**UTAH BAR COMMISSION MEETING
AGENDA ITEM**

Title: Judge of the Year Award Selection

Item: #2.4

Submitted by: John Baldwin

Meeting Date: May 12, 2017

ITEM/ISSUE:

To select the 2017 Judge of the Year Award recipient.

CRITERIA:

Career exemplifies the highest standards of judicial conduct for integrity and independence; who is knowledgeable of the law and faithful to it; who is unswayed by partisan interests, public clamor or fear of criticism; patient, dignified and courteous to all who appear before the court; endeavors to improve the administration of justice and public understanding of, and respect for, the role of law in our society.

NOMINEES:

1. Hon. Robert K. Hilder (Deceased)
2. Hon. Fredric Voros, Jr.
3. Hon. Stephen Roth

PAST RECIPIENTS AND NOMINEES:

Past Recipients	Other Nominations That Year
2016 Hon. C. Dane Nolan	
2015 Hon. Claudia Laycock	Hon. Brooke C. Wells, Hon. Carolyn B. McHugh, Hon. John R. Morris, Hon. Augustus Chin, Hon. Thomas L. Kay, Hon. David Nuffer, Hon. Paul M. Warner, Hon. Royal I. Hansen, Hon. Glen R. Dawson, Hon. Thomas L. Kay
2014 Hon. James Shumate	Hon. Carolyn McHugh, Hon. John Morris, Hon. Brooke Wells
2013 Hon. Michael D. Lyon	Hon. Thomas L. Kay
2012 Hon. Royal I. Hansen	Hon. Thomas L. Kay
2011 Hon. Dee Benson	Hon. Randall Skanchy
2010 Hon. Robert K. Hilder	
2009 Hon. Judith S. Atherton	
2008 Hon. Glenn K. Iwasaki	Hon. Glenn K. Iwasaki
2007 Hon. Sandra Peuler Hon. Gregory K. Orme	
2006 Hon. Gordon J. Low	Hon. Glen K. Iwasaki Hon. Sandra Peuler
2005 Hon. Andrew Valdez	
2004 Hon. William B. Bohling	
2003 Hon. Ronald N. Boyce (posthumously)	Hon. Sandra Peuler; Hon. Sheila McCleve; Hon. Glen K. Iwasaki
2002 Hon. Stephen H. Anderson Hon. Jeril B. Wilson	Hon. Sheila McCleve; Hon. Glen K. Iwasaki
2001 Hon. Raymond M. Harding, Sr. Hon. Sharon P. McCully Hon. Anne M. Stirba	
2000 Hon. Guy R. Burningham	
1999 Hon. David Sam Hon. Lynn W. Davis	
1998 Hon. Tyrone E. Medley	
1997 Hon. W. Brent West	
1996 Hon. Leslie A. Lewis	
1995 Hon. J. Thomas Green, Jr.	
1994 Hon. John A. Rokich	
1993 Hon. Bruce S. Jenkins	
1991 Hon. Cullen Y. Christensen	

INFO ONLY:

DISCUSSION:

ACTION NEEDED: X

Christy Abad

From: Heather Thuet <heather.thuet@chrisjen.com>
Sent: Monday, May 01, 2017 12:20 PM
To: Christy Abad
Subject: FW: Asking for your help . . .

Christy,

I am not sure this email made its way to you. I received a response saying I was unable to respond to all.

~Heather

From: Heather Thuet
Sent: Monday, May 01, 2017 12:15 PM
To: 'Christy Abad'; CommissionersAll
Subject: RE: Asking for your help . . .

All:

I nominate my mentor and recently departed, Judge Robert K. Hilder, for Judge of the Year and Lawyer of the Year. I am sure that most of you knew him or had the pleasure to practice before him while he was on the bench or in mediations. He was passionate, charismatic, and his Australian accent mesmerizing. He emigrated from Australia to Utah in late 70's and obtained his law degree from the U of U in early 80's. He was a shareholder at Christensen & Jensen, before serving in the Third District from 1995 until his retirement in 2011. In 2015 he was elected to Summit County attorney. Robert exemplified the epitome of professionalism and dedication to improving the practice of law. He was diagnosed with esophageal cancer in early February and passed away on April 26 surrounded by his loved ones.

~Heather

From: Christy Abad [<mailto:christy.abad@utahbar.org>]
Sent: Monday, May 01, 2017 11:56 AM
To: CommissionersAll
Subject: Asking for your help . . .

We are seeking more nominations for the Annual Awards; Lawyer of the Year, Judge of the Year, Committee of the Year, and Section of the Year. I have attached the award criteria to this email. If you would like to make a nomination in any or all of these categories, we would welcome your assistance.

Thank you.

Christy

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Administrative Office of the Courts

Chief Justice Matthew B. Durrant
Utah Supreme Court
Chair, Utah Judicial Council

April 30, 2017

Daniel J. Becker
State Court Administrator
Raymond H. Wahl
Deputy Court Administrator

Robert O. Rice, Esq.
President
The Utah State Bar
645 S 200 E
Salt Lake City, UT 84111

Dear Rob:

It is my pleasure and honor to nominate both Judge Fred Voros and Judge Stephen Roth for the Utah State Bar's Distinguished Judge of the Year Award for 2017.

For the past year, I've served as the Appellate Court Administrator for the Utah Courts. As such, I've had a chance to observe both judges in different roles, settings, and capacities. I've come away thoroughly impressed with their intellect, work ethic, dedication, integrity, compassion, and personal character; I believe both men exemplify the best and highest ideals of the Utah judiciary.

Judge J. Frederic Voros, Jr., was appointed to the Utah Court of Appeals in 2009 by Governor Gary R. Herbert, and in 2014 his colleagues unanimously elected him to serve as the Court's presiding judge. The Court of Appeals has a burgeoning and diverse caseload, which has been extremely challenging to manage. However, under Judge Voros's leadership, the Court of Appeals has streamlined how appeals are processed and decided, which has reduced delays, increased timely case dispositions, and improved access to justice. He has a well-deserved reputation among judges and lawyers for being collegial, extremely bright, well-prepared, and unfailingly courteous. And, with a highly developed attention to detail and a devotion to fostering the integrity of the institution, Judge Voros exercises administrative oversight with an adroit mix of consensus building and firm leadership. His longstanding commitment to improving the administration of justice has deep roots: he has served for twenty-two years as a seemingly indefatigable member of the Utah Supreme Court's Advisory Committee on the Rules of Appellate Procedure.

Judge Voros is also known for his tireless efforts in cultivating public respect for the law. Recently, on behalf of the judiciary, he wrote several articles for the Utah State Bar and city newspapers commemorating the Fourteenth Amendment, which were part of the annual Law Day

**The mission of the Utah judiciary is to provide the people an open, fair,
efficient, and independent system for the advancement of justice under the law.**

Robert O. Rice, Esq.
April 30, 2017
Page 2

celebration. Modest and uncomfortable with public attention, he is nevertheless a willing and effective advocate for the rule of law.

In court, Judge Voros is a lively member of any three-judge panel with which he participates. He is thoroughly prepared, and asks perceptive questions that are designed to penetrate the issues at hand. Always the gentleman, Judge Voros treats everyone with courtesy, dignity, and respect. He is also known for his good-humored persistence and his willingness to consider all sides of every case. His written work — which is always well-constructed and scholarly — is held in high esteem by his colleagues on the bench, as well as members of the Bar, who appreciate its clarity, pragmatism, and careful reasoning.

Judge Voros earned a bachelor's degree from Brigham Young University in 1975 and a law degree from its J. Reuben Clark Law School in 1978. He clerked for Utah Supreme Court Justice Dallin H. Oaks, and he later served as general counsel to Ricks College in Rexburg, Idaho, and practiced with Prince, Yeates & Geldzahler and Poole & Associates before joining the Utah Attorney General's Office in 1991, where he later rose to chief of the Criminal Appeals Division from 1999 to 2009. Judge Voros has been an Adjunct Professor of Law at the S.J. Quinney College of Law, University of Utah, since 2001, and in 2005, he received the Peter W. Billings Excellence in Teaching Award.

Judge Stephen L. Roth was appointed to the Utah Court of Appeals in 2010 by Governor Gary R. Herbert after serving eight distinguished years as a trial judge in the Third District Court. Judge Roth is a thoughtful legal scholar who combines a tremendous work ethic with a deep sense of compassion and conscientiousness for the litigants who appear before the Court.

Judge Roth has made many significant contributions to the administration of justice. His service includes years of participating on the Utah State Bar's Litigation Section Executive Committee and as an executive committee member of the Safe at Home Coalition, now known as the Family Justice Center. His work on behalf of the judiciary is even more extensive because he has been tapped to participate in a seemingly endless number of court-related committees. His leadership on the Judicial Council's Study Committee on Representation of Indigent Criminal Defendants will be perhaps his most significant and enduring legacy in improving the quality of justice in our State. This enormous undertaking identified important areas of concern about the delivery of indigent criminal defense services, and culminated in a series of far-reaching recommendations that will assure effective legal representation for people who cannot afford an attorney in criminal cases.

Robert O. Rice, Esq.
April 30, 2017
Page 3

Judge Roth can also count in his legacy the myriad number of lives that he has touched and influenced. He is generous with his time; liberal in his praise and approbation; always happy to mentor a colleague on the law and life; and his warmth, wit, and wisdom are appreciated by all fortunate to call him friend.

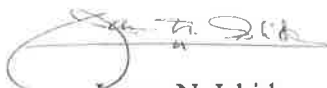
Judge Roth's life and professional career is a rich tapestry of significant events and achievements. Prior to his appointment to the Court of Appeals and Third District Court, Judge Roth served in the United States Marine Corps from 1970 to 1974. Following his distinguished military career, Judge Roth attended law school at Brigham Young University, where he was a note and comment editor on the Brigham Young University Law Review. He excelled academically, graduating cum laude in 1977. He then worked as an associate at the Seattle firm of Bogle & Gates from 1977 to 1978, and later an associate and then member of Snow, Christensen & Martineau in Salt Lake City from 1978 through 1991, doing primarily commercial litigation. From 1991 until appointed to the trial bench, Judge Roth served as an Assistant United States Attorney, working as a trial lawyer in the Civil Division of the United States Attorney's Office. Judge Roth served as an adjunct professor in the trial advocacy program at the S.J. Quinney College of Law, University of Utah, from 2002 through 2007, on the Utah Supreme Court's Advisory Committee for Rules of Professional Conduct from 2003 to 2011, and as a member of the executive committee of the Safe at Home Coalition (now the Family Justice Center) from 2006 to 2010. He served as chair of the Study Committee on Representation of Indigent Criminal Defendants and is past chair of the Commissioner Conduct Committee. Judge Roth is also a member of the Judicial Council's Alternative Dispute Resolution Committee, the Court Facilities Planning Committee, the Court Technology Committee, the Utah State Bar Litigation Section Executive Committee, and the Aldon J. Anderson American Inn of Court.

Both men exemplify what is right about how judges are selected in Utah, a process that ensures that only the best and brightest are chosen to serve in the Utah judiciary. And after years of dedicated and exemplary public service, both Judge Voros and Judge Roth have decided to retire on August 1, 2017. It is fitting and proper that they are linked together in retirement. For both judges, in addition to being a judge's judge, also share common endearing virtues such as their mutual, deep concern for the welfare of everyone involved in our cases, their lack of egotistical attachment to a particular point of view, their thoughtful reflection on every problem, and their kindness and compassion for every life they touched. We owe a tremendous debt of gratitude to Judge Voros and Judge Roth for their service to the people of Utah. We applaud them for their dedication and congratulate them on their well-earned retirement. They will be greatly missed.

Robert O. Rice, Esq.
April 30, 2017
Page 4

It is for these, and many other reasons, that I'm proud to nominate Judge Fred Voros and Judge Stephen Roth for the Utah State Bar's Distinguished Judge of the Year Award for 2017. Thank you very much for your and the Bar Commission's consideration.

Sincerely,



James N. Ishida

cc: Utah State Bar Commissioners

Utah Court of Appeals



Chambers of
Judge Michele M. Christiansen

450 South State Street
P.O. Box 140230
Salt Lake City, Utah 84114 - 0230
(801) 578-3950
FAX (801) 238-7981

Utah State Bar Commission

Nomination of Judges J. Frederic Voros and Stephen L. Roth for 2017 Judges of the Year

Utah State Bar Commissioners:

I write this letter in support of the nomination of Utah Court of Appeals Judges J. Frederic Voros and Stephen L. Roth for the Utah State Bar's 2017 Judges of the Year Award. My incredible colleagues are retiring this summer and my hope is that they can be recognized and honored for their incredible service to the State of Utah and to the Utah State Bar. Both Judge Voros and Judge Roth are excellent and dedicated jurists whose long and distinguished careers have exemplified the highest standards of judicial conduct for integrity and independence and who are both incredibly knowledgeable of the law and faithful to it. Judges Voros and Roth are judges and people "who [are] unswayed by partisan interests, public clamor or fear of criticism and [are] patient, dignified and courteous to all who appear before [them]." Fred Voros and Steve Roth are examples of the type of judge that I hope to be—thoughtful, dedicated, controlled, responsible, kind, and intellectually engaged. I also am writing to let you know some of my personal thoughts about these two judges that will hopefully explain the high regard I have for my colleagues and for my friends.

Both Judge Voros and Judge Roth have had distinguished careers as lawyers, advocates, teachers, and judges. Judge Voros has had extensive experience in criminal appeals and is really the go-to person for questions on appellate precedent and appellate rules and procedures. Judge Voros joined the Utah Attorney General's Office in 1991, and served as chief of the Criminal Appeals Division from 1999 to 2009, before being appointed to the Court of Appeals in September of 2009. Judge Voros has been the Presiding Judge of this court for the past four years and has truly dedicated himself to the improvement of the appellate courts through his dedication to the rule of law and to clarifying and simplifying the rules of appellate procedure. Similarly, Judge Roth has served the Utah State Courts for over fifteen years, both as a trial judge in the Third District and since 2010, as a judge on the Court of Appeals. Through his work as chair of the Utah Judicial Council's Study Committee on Representation of Indigent Criminal Defendants, a project that took an extraordinary amount of time and effort, Steve truly has dedicated himself to advancing the court's mission "to provide the people an open, fair, efficient, and independent system for the advancement of justice under the law." On a personal note, Steve Roth has been a mentor to me since 1998, when I joined the United States Attorney's Office as a new Assistant United States Attorney. I followed Steve from the USAO to the Third District bench in 2007, and then to the Court of Appeals in 2010. All along this path, I realized that if I acted and judged the way that Judge Roth did, I would do my work with integrity, enthusiasm, and dedication.

Over the years, both Judge Voros and Judge Roth have demonstrated their commitment to the Bar and to the courts by teaching, serving on committees, speaking at conferences and CLEs, and finding ways to improve the administration of justice. At the same time, they have both worked incredibly hard to meet the demands of the Court of Appeals' high workload--at times to their personal detriment. In my opinion, Judges Voros and Roth are two of the most dedicated and hard-working judges on the bench today. I have had the honor of working with them on a daily basis and I know that all of my colleagues will agree with my assessment. Not only are Fred and Steve impressive and dedicated professionals, they are both incredible people and friends. I cannot even count the number of times I have sought each of them out for their advice and thoughts on both law-related and personal topics. Both men are thoughtful, interesting, engaging, amusing, and are both trusted confidants. Judge Voros' and Judge Roth's retirements this July will leave a big hole on this court that will be hard to fill.

Finally, as dedicated public servants who have served the Utah Court of Appeals and the Utah State Courts for many years, I truly believe that Judges Voros and Roth consistently seek to "improve the administration of justice and public understanding of, and respect for, the role of law in our society." Both judges will leave an extensive body of written decisions that show respect for our system of government and our separation of powers, advance and clarify the law in many areas, and help generate respect for our courts and judges by demonstrating thoughtful and careful consideration of the cases brought before the Utah Court of Appeals. Thank you for considering this nomination for the Utah State Bar's Judges of the Year.

Sincerely,

A handwritten signature in dark ink, appearing to read "Michele M. Christiansen". The signature is fluid and cursive, with a long, sweeping tail that extends to the right.

Judge Michele M. Christiansen
Utah Court of Appeals

TAB
6

UTAH BAR COMMISSION MEETING AGENDA ITEM

Title: Committee of the Year Award Selection

Item: #2.5

Submitted by: John Baldwin

Meeting Date: May 12, 2017

ITEM/ISSUE:

To select the 2017 Committee of the Year Award recipient.

CRITERIA:

Presented to the Committee of the Utah State Bar that has made outstanding contributions of time and talents to Bar activities as well as provide outstanding services, programs and/or activities for Bar members and the public at large during the past year.

NOMINEES:

1. Governmental Relations Committee

PAST RECIPIENTS AND NOMINEES:

Past Recipients	Other Nominations That Year
2016 Utah State Bar Leadership Academy	
2015 Disaster Legal Response Committee	
2014 Civics Education Committee	Disaster Legal Response Committee
2013 Budget and Finance Committee	
2012 Pro Bono Commission	
2011 Unauthorized Practice of Law	
2010 Bar Examiner Committee	
2009 New Lawyer Training Program	
2008 Admissions Committee	
2007 <i>Bar Journal</i> Committee	Unauthorized Practice of Law Committee, New Lawyer CLE Committee
2006 Ethics Advisory Opinion Committee	New Lawyer CLE Committee, Governmental Relations Committee, UPL Committee
2005 Governmental Relations Committee	
2004 Unauthorized Practice of Law Committee	
2003 Needs of the Elderly Committee	Client Security Fund Committee; Ethics Advisory Opinion Committee
2002 Character & Fitness Committee	Client Security Fund Committee
2001 No Award	
2000 Admissions Committee	
1999 Client Security Fund Committee	
1998 Courts & Judges Committee	
1997 UPL Committee	
1996 Need of Children Committee	
1995 Delivery of Legal Services Committee	
1994 Ethics Advisory Opinion Committee	
1993 Legislative Affairs Committee	
1992 Ethics & Discipline Committee	
1990 Bar Examiner Committee	

INFO ONLY:

DISCUSSION:

ACTION NEEDED: X

RAY QUINNEY & NEBEKER

May 8, 2017

VIA EMAIL
john.baldwin@utahbar.org

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

Robert O. Rice
ATTORNEY AT LAW

PO Box 45385
Salt Lake City, Utah
84145-0385

36 South State Street
Suite 1400
Salt Lake City, Utah
84111

801 532-1500 FIRM
801 323-3352 DIRECT
801 532-7543 FAX
rrice@rqn.com
www.rqn.com

Re: *Committee of the Year Nomination*

Dear John:


I hereby nominate the Utah Government Relations Committee ("GRC") for this year's Committee of the Year Award. For years, the Government Relations Committee has worked tirelessly (and thanklessly) reviewing hundreds of draft bills and making recommendations to the Utah Bar Commission regarding which bills the Bar Commission should or should not support. This work is terribly important. The GRC meets in a series of whirlwind meetings during the legislative session, calling on representatives from each Bar section to comment on legislation. In that way, the GRC is able to utilize expertise from all practice areas in our bar.

GRC co-chairs John Bogart, Jaqualin Friend Peterson and Cameron Beech, have ably lead the GRC for the last several years. Their commitment to the GRC's cause and to the legal profession is undeniable.

For these reasons, I nominate the GRC for this year's Committee of the Year Award.

Sincerely,

RAY QUINNEY & NEBEKER



Robert O. Rice

ROR/mm
1413114

TAB
7

UTAH BAR COMMISSION MEETING AGENDA ITEM

Title: Section of the Year Award Selection

Item: #2.6

Submitted by: John Baldwin

Meeting Date: May 12, 2017

ITEM/ISSUE:

To select the 2017 Section of the Year Award recipient.

CRITERIA:

Presented to a section of the Utah State Bar that has made outstanding contributions of time and talents to Bar activities as well as provided outstanding services, programs and/or activities for Bar members and the public at large during the past year; given annually to recognize programs of the bar that serve the mission of being a united, inclusive organization serving the legal profession and the public.

NOMINEES:

1. LGBT & Allied Lawyers
2. Limited Scope Section
3. IP Section
4. Family Law Section

PAST RECIPIENTS AND NOMINEES:

Past Recipients	Other Nominations That Year
2016 Bankruptcy Section	Estate Planning Section
2015 Young Lawyers Division	
2014 Intellectual Property Section	Young Lawyers' Division
2013 Solo, Small Firm, and Rural Practice Section	Appellate Practice Section, Juvenile Law Section, Young Lawyers' Division
2012 Estate Planning Section	Elder Law Section, Young Lawyers Division
2011 Elder Law Section, Young Lawyers Division	
2010 Military Law Section	
2009 Appellate Practice	Constitutional Law Section, Solo, Small Firm and Rural Practice Section
2008 Young Lawyers Division	Young Lawyers Division, Estate Planning Section, IP Section
2007 Paralegal Division	Banking and Finance Section
2006 Litigation Section	Banking & Finance Section, Paralegal Division
2005 ADR Section	
2004 Young Lawyers Division	
2003 Family Law Section	Governmental Law Section; Real Property Section; Young Lawyer's Division
2002 Young Lawyers Division	Real Property Section; Young Lawyer's Division; Governmental Law Section
2001 Legal Assistants Division	
1998 Legal Assistants Division	
1997 Young Lawyers Division	
1996 No Award	
1995 Litigation Section	
1994 No Award	
1993 Litigation Section	
1992 No Award	
1991 Family Law Section	
1990 Litigation Section	

INFO ONLY:

DISCUSSION:

ACTION NEEDED: X

TAB
8

Hello Richard,

Thank you for the call and update earlier today, it's always great to hear from you.

Here is some of the information I have gathered;

Click here for information on Canyons Golf course,
<http://www.parkcitymountain.com/activities/golf.aspx#/GeneralInformation> Within is the virtual tour I mentioned. Whenever you need to get a round in to make sure the property is good fit, you just let me know!

Attached is a map of the Resort to give a feel for the layout. You will also find our catering menu and AV pricing sheets attached. There are also a couple of photos of the Pavilion tent, as we call it. I envision this for meals, but you may have other ideas for the space. Finally, I attached a diagram of the meeting space to help you build a schedule of events.

As for rates, we can offer the following, for July of 2018. As mentioned, at this time we have

Grand Summit Hotel

Standard Hotel Room \$169.00

* Please note there is a \$30.00 per room, per night resort fee

** Both the Resort fee and lodging rate are taxed at 12.08%

Sundial Lodge

Standard Hotel Room \$139.00

* Please note there is a \$20.00 per room, per night resort fee

** Both the Resort fee and lodging rate are taxed at 12.08%

*** Please note, the Sundial only provides mid-week housekeeping for stays of 5 or more days.

Silverado Lodge

Standard Hotel Room \$129.00

* Please note there is a \$20.00 per room, per night resort fee

** Both the Resort fee and lodging rate are taxed at 12.08%

*** Please note, the Silverado only provides mid-week housekeeping for stays of 5 or more days.

Also, we have an update on the Grand Summit Hotel remodel, which is taking place as I type. Click here for photos of the model room and other information on the matter,

<http://www.parkcitymountain.com/plan-your-trip/lodging/grand-summit-2017.aspx>

Don't forget about Red Pine Lodge, our on mountain venue. Attached is a photo and menu for the venue.

I hope this is a good start. I went back through our communication and do not believe I proposed any site fees or food and beverage minimum spends. But, once I know a schedule of events, I can build that out and provide pricing.

Keep me posted Richard, let me know what additional information you need.

Have a great weekend!

Best,
Gregg

GREGG HAUSER

Sales Manager, National Accounts

O: 435-615-8056 | F: 435-615-1239

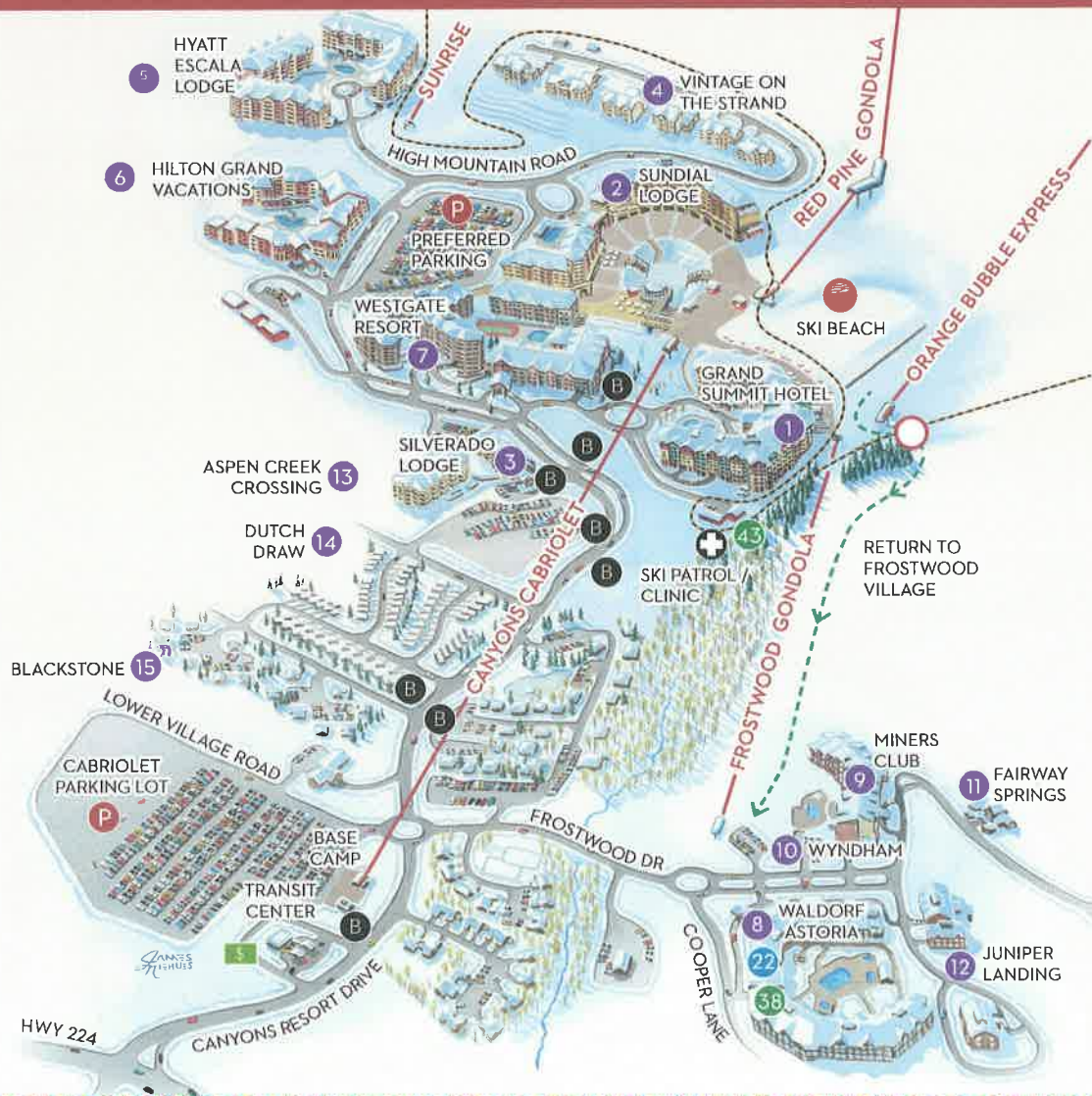
parkcitymountain.com

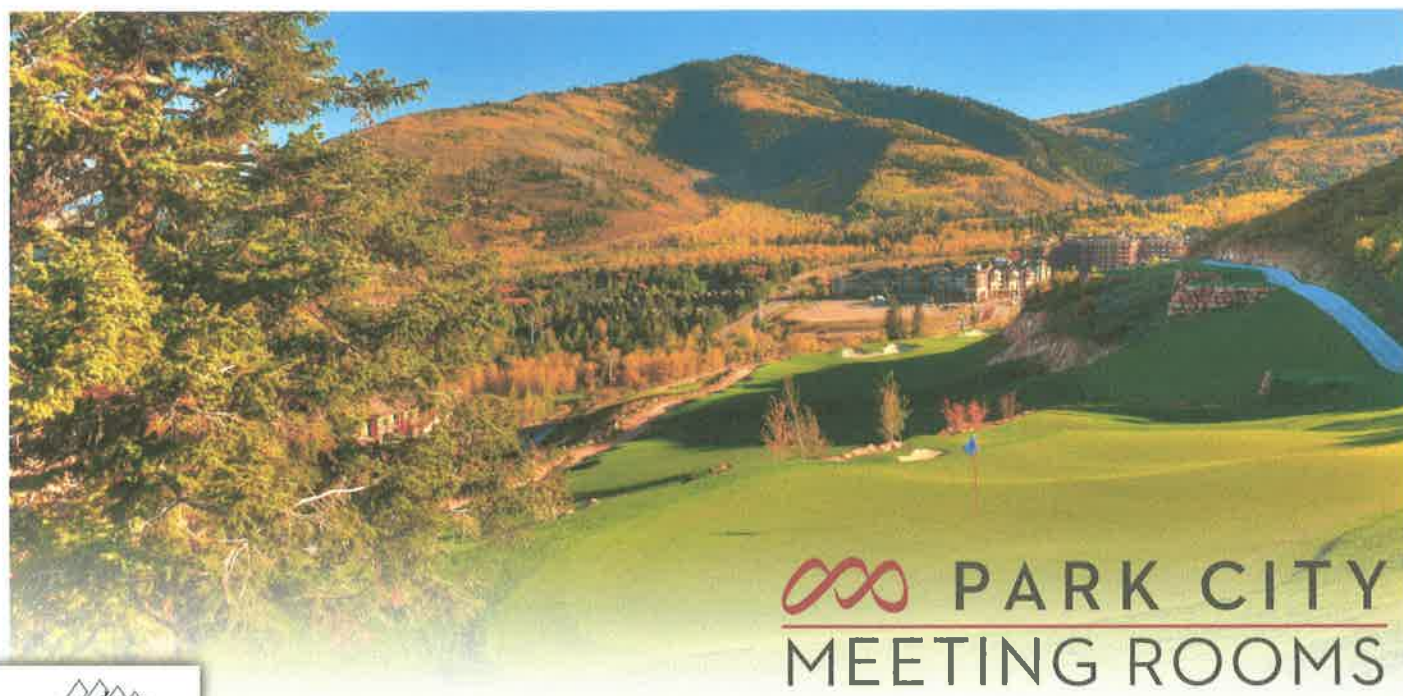
PARK CITY | CANYONS VILLAGE



- LODGING**
1. GRAND SUMMIT HOTEL *
 2. SUNDIAL LODGE *
 3. SILVERADO LODGE *
 4. VINTAGE ON THE STRAND *
 5. HYATT ESCALA LODGE
 6. HILTON GRAND VACATIONS
 7. WESTGATE RESORT
 8. WALDORF ASTORIA
 9. MINERS CLUB
 10. WYNDHAM
 11. FAIRWAY SPRINGS
 12. JUNIPER LANDING
 13. ASPEN CREEK CROSSING
 14. DUTCH DRAW
 15. BLACKSTONE
 16. THE FAIRM
 17. RED BAL CORN
 18. UMBRELLA BAR
 19. HURROCK'S
 20. FIRST TRAILS CAFE
 21. BISTRO AT CANYONS
 22. POWER
 23. WESTGATE MARKETPLACE & DELI
 24. EDGE STEAKHOUSE
 25. DRAFTS
 26. ESCALA PROVISION COMPANY
 27. BACKCOUNTRY CANNIBAL HOMESPACE
 28. SMOKEHOUSE
 29. THE NORTH FACE
 30. ONE SHELL HOLE
 31. CANYON MOUNTAIN SPORTS
 32. CANYON MOUNTAIN REPAIRS
 33. SOLID EDGE TUNING & REPAIR
 34. DAY LOCKERS / RESTROOMS
 35. SUNFLOOR
 36. CANYONS KIDS RETAIL STORE
 37. STEREMITY SPA
 38. PARK CITY BOOTHOUSE & SPA
 39. WALDORF ASTORIA SPA
 40. CHILD CARE CENTER
 41. GIFT SHOP
 42. TICKET OFFICES
 43. SKI / SNOWBOARD VALET
 44. SKI PATROL / CLINIC
 45. RESORT ACTIVITIES
 46. SKI & SNOWBOARD RENTAL OFFICE
 47. KIDS VALET/RENTAL
 48. ADULT GROUP MEETING AREA
 49. PRIVATE LESSON MEETING AREA
 50. KIDS LESSON/MEETING AREA
 51. KIDS ULTIMATE 4 RECREAL
 52. KIDS ULTIMATE 5 RECREAL
 53. KIDS ULTIMATE 4 AND 5 RECREAL
 54. KIDS ULTIMATE 5 MEETING AREA
- RESTAURANTS & BARS**
- SHOPS & SERVICES**
- SKI & SNOWBOARD SCHOOL**
- LEGEND**
- 1. BUS STOP
 - 2. RESTROOMS
 - 3. SKI PATROL / CLINIC
 - 4. SPRING CHANGING STATION
 - 5. ATM
 - 6. SKI AREA BOUNDARY
 - 7. ACCESS TO LODGING EXISTS
 - 8. RESORT BOUNDARY
 - 9. PARKING

CANYONS VILLAGE OVERVIEW

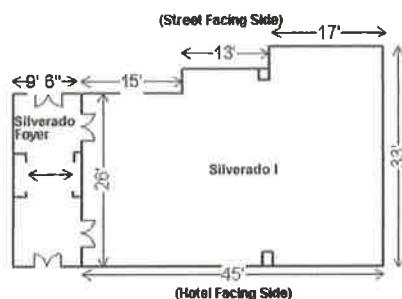




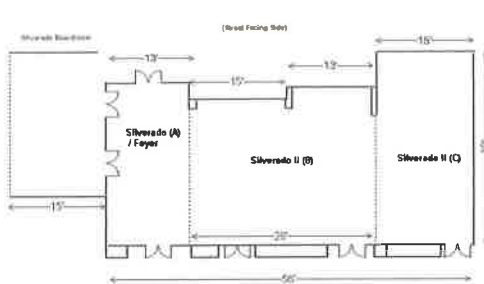
ROOM	SPECS			SETUP - Maximum with Basic AV					
	Sq Ft	Size	Ceiling	CLASS	THEATER	ROUNDS	RECEPTION	U-SHAPE	CONF/HS
Kokopelli Ballroom	5850	51 x 116	14'	375	550	400	800	-	-
Kokopelli Parlor I	1950	51 x 38	14'	116	175	120	200	44	56
Kokopelli Parlor II	2350	51 x 46	14'	136	225	160	250	50	64
Kokopelli Parlor III	1550	51 x 31	14'	90	150	90	160	34	40
Ballroom Lobby / Pre-Function	1710	90 x 19	14'	-	-	-	175	-	-
White Pine Ballroom	1630	56 x 31	9'	100	150	90	160	40	46
White Pine Parlor I	815	28 x 31	9'	44	70	40	75	16	32
White Pine Parlor II	815	28 x 31	9'	44	70	40	75	16	32
Painted Horse	1014	26 x 39	8'	64	100	60	100	26	40
Painted Horse Parlor I	507	20 x 26	8'	28	48	30	50	20	24
Painted Horse Parlor II	507	20 x 26	8'	28	48	30	50	20	24
Arrowhead	1014	26 x 39	8'	64	100	60	100	26	40
Arrowhead Parlor I	507	20 x 26	8'	28	48	30	50	20	24
Arrowhead Parlor II	507	20 x 26	8'	28	48	30	50	20	24
Cabin (COLUMNS)	1824	38 x 48	10'	50	140	100	165	-	-
Cabin Boardroom	464	16 x 29	10'	-	-	-	-	-	16



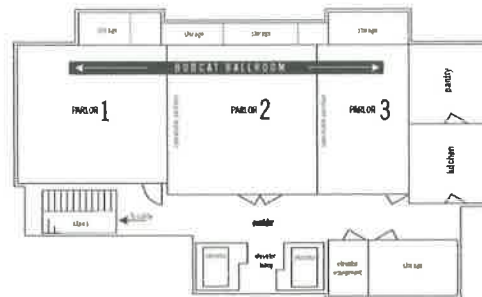
SILVERADO I



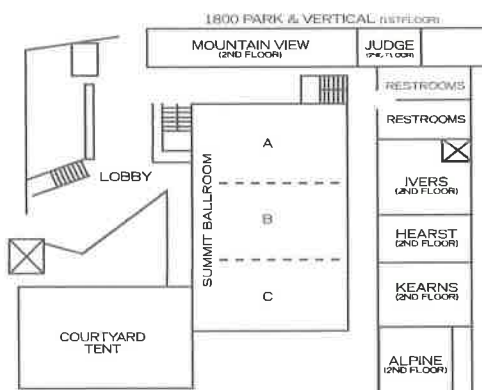
SILVERADO 2



BOBCAT BALLROOM



ROOM	SPECS			SETUP - Maximum with Basic AV					
	Sq Ft	Size	Ceiling	CLASS	THEATER	ROUNDS	RECEPTION	U-SHAPE	CONF/HS
Silverado I (SEASONAL)	1170	45 x 26	10'	60	80	80	110	40	48
Silverado II	1176	56 x 21	10'	60	80	80	110	40	48
A	312	24 x 13	10'	-	25	20	-	-	-
B	588	21 x 28	10'	40	60	40	70	24	32
C	450	15 x 30	10'	-	25	20	-	20	24
Bobcat Ballroom	1680	24 x 70	9'	110	120	100	180	36	40
Bobcat Parlor I	644	23 x 28	9'	28	40	40	80	24	32
Bobcat Parlor II	575	25 x 23	9'	28	40	40	60	20	28
Bobcat Parlor III	475	25 x 19	9'	20	35	20	40	16	24
Bearclaw	644	28 x 23	8'	40	60	40	50	20	24



ROOM	SPECS			SETUP - Maximum Set with Basic AV					
	Sq Ft	Size	Ceiling	CLASS	THEATER	ROUNDS	RECEPTION	U-SHAPE	CONF/HS
Summit Ballroom	5100	85 x 60	15'	300	600	360	500	-	-
Summit A	1680	28 x 60	15'	90	180	120	175	36	42
Summit B	1680	28 x 60	15'	90	180	120	175	36	42
Summit C	1740	29 x 60	15'	90	180	120	175	36	42
Summit A & B	3360	56 x 60	15'	180	240	240	350	50	60
Summit B & C	3420	57 x 60	15'	180	240	240	350	50	60
Ivers-Hearst-Kearns (IHK)	2380	35 x 64	8'	90	150	150	250	-	-
Ivers	840	35 x 24	8'	30	49	48	49	24	28
Hearst	770	35 x 22	8'	30	49	48	49	24	28
Kearns	770	35 x 22	8'	30	49	48	49	24	28
IH/HK	1540	35 x 44	8'	64	100	100	100	42	48
Mountain View	1240	20 x 62	10'	60	80	80	80	32	36
Alpine Room	360	20 x 18	8'	-	-	-	-	-	16
Judge Room	357	17 x 21	8'	-	-	-	-	-	12
Courtyard Tent (SEASONAL)	2400	40 x 60	15'	120	200	184	250	35	42



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AUDIOVISUAL SERVICES

PARK CITY

COMPLETE PACKAGES

The Total Package	\$900	Projection Support Package	\$200
Just bring the Presenter – Laptop Computer, 7000 Lumen LCD Projector, Skirted 6', 7', or 8' Projection Screen, Skirted Projection Cart		All you need is your Laptop and Projector – Skirted 6', 7', or 8' Projection Screen, Skirted Projection Cart	
		Upgrade to 7.5'x10' Fastfold Screen with Dress Kit and Wooden Columns	\$400
		Upgrade to 9'x12' Fastfold Screen with Dress Kit and Wooden Columns	\$400
The Projector Package	\$450	The Presenter Package	\$700
Just bring your Laptop – 4500 Lumen LCD Projector, Skirted 6', 7', or 8' Projection Screen, Skirted Projection Cart		Small Meeting Solution – 50" Plasma Monitor with Stand and Speakers, DVD Player, Laptop Display Connection	
		Add Laptop Computer	\$300
		Add 32" Flat Panel Monitor	\$320
Big Impact ... Big Screen		Presidential Lighting Package	\$600
10'x10' Cradle Screen	\$250	Lighting your High Level Presenters & Head Table on Stage – (4) Leko Lights, (2) Dimmers, (2) Lighting Stands, Controller, Black Velour Adjustable Drape (maximum of 20'), (2) Floor Par Cans (with your Corporate Color, if available)	
7.5'x10' Fastfold Screen with Wooden Columns	\$350		
9'x12' Fastfold Screen (Larger sizes available upon request)	\$400		
Add a Theatre Style with Velour Trim			
Sound System Package I	\$300	Podium Lighting Package	\$300
For Groups of 20 to 40 Guests – (1) Powered Speaker with Stand, 4-Channel Mixer, Wireless Microphone		Basic Lighting for Podium Only – (2) Leko Lights, (1) Dimmer, (2) Lighting Stands, Controller	
Sound System Package II	\$550	Décor Lighting Package	\$500
For Groups over 40 Guests – (2) Powered Speakers with Stands, 8-Channel Mixer, CD Player or iPod Connection, Stereo 24-Band Equalizer, Wireless Microphone		Perfect for Weddings & Special Occasions – (4) LED UpLights	
Sound System Package III	\$700	Add Color to match your Theme or Corporate Colors	
For Groups over 100 Guests – (4) Powered Speakers with Stands, 16-Channel Mixer, CD Player or iPod Connection, Stereo 24-Band Equalizer, Wireless Microphone			

*All packages include necessary cables, extension cords, Safety Taping, and on-site technical support.
Customize a Scenery or Décor Package for your Event. Please call for details.

For Consultation, please contact our on-site representative with Five-Star AudioVisual at:

Phone: (435) 604.3199 • Fax: (435) 604.3299 • E-Mail: sriggs@five-starav.com

All audiovisual equipment rates shown are per day and are subject to a 20% Service Charge. Please note for larger or more complex requirements, appropriate set-up, strike, and/or operator labor and delivery charges may be incurred for off-site and outdoor events. If you do not see an item that is necessary to make your event a success, please call for a professional consultation.

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AUDIOVISUAL SERVICES

AUDIOVISUAL A LA CARTE

PROJECTION

7000 Lumen Projector	\$500
4500 Lumen Projector	\$300
Laser Pointer	\$35
Wireless Mouse with Laser Pointer	\$50
Projection Cart with Drape	\$35
Black Velour Adjustable Drape (per linear foot)	\$15
Walnut Chenille Adjustable Drape (per linear foot)	\$20

VIDEO/DATA EQUIPMENT

HD Camera with Tripod and SD Cards	\$800
9" HD Preview Monitor	\$45
32" HD Flat Panel Monitor	\$320
50" HD Flat Panel Monitor	\$550
70" HD Flat Panel Monitor	\$700
80" HD Flat Panel Monitor	\$850
Blu-ray Player	\$75
Seamless Switcher	\$300
VGA Distribution Amplifier	\$60
VGA Switcher	\$50
Short Throw or Long Throw Lens	\$95

LIGHTING

Source 4 Leko	\$50
Source 4 Par	\$50
2k Dimmer	\$50
12-Channel Control Board	\$75
LED Light	\$85
Follow Spot (1000 watts)	\$175
Moving Light Fixtures	\$275
Custom Lighting Gobos	Call for consultation

Custom Lighting available, including colored décor lighting and theme or logo images. Please allow at least 2-3 weeks' notice for customer order.

AUDIO

Wired Microphone	\$75
Slim Line Microphone	\$75
Wireless UHF Microphone System	\$140
4-Channel Mixer	\$55
14-Channel Mixer	\$100
16-Digital Mixer	\$175
Powered Speaker	\$90
5-Disc CD Player	\$65
CD Recorder	\$65
DVD Recorder	\$100
Computer Audio Connection	\$30
Audio House System Patch	\$60

MISCELLANEOUS EQUIPMENT

Tripod Easel	\$15
Masking Tape	\$5
Flipchart with Markers	\$50
6'x5' Whiteboard with Markers	\$50
Laptop Computer	\$300
Speaker Cue-Light	\$100
Teleconference Speakerphone (toll charges not included)	\$150
VGA Cable (25'-50')	\$25
Power Package (includes Extension Cord & Power Strip)	\$25

ON-SITE TECHNICAL LABOR

(Per Hour - 5 Hour Minimum)

Monday - Friday	
7AM - 5PM	\$105
5PM - 12AM	\$120
12AM - 7AM	\$150
Saturday, Sunday / Holiday	
7AM - 5PM	\$105
5PM - 7AM	\$150
Holidays	\$150

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TAB
9

REPORT OF THE CONVENTION REVIEW COMMITTEE

May 11, 2017

Charge to the 2017 Convention Review Committee from Utah Bar President, Rob Rice:

To address the following questions:

- 1) How should the Bar define success of the Summer Convention (and other two major conventions) (finances, attendance, other?)
- 2) What should the Bar's approach to the three major Bar conventions (Summer, Fall Forum and Spring) be for the next five years?

“=

To address and respond to the charge stated above, the Committee met multiple times from October 2016 through April 2017 and worked by assignment to gather information and resources to consider the stated questions in the charge above. Specifically, the Committee considered the following information which is also attached hereto as part of the Appendices to this Report:

- 1) Financial reports from past Summer Conventions, Spring Conventions and Fall Forum meetings including attendance and costs to the Bar (Appendix 1)
- 2) Survey results of Bar membership (Appendix 2)
- 3) Survey results of Section and Bar affinity group leadership (Appendix 3)
- 4) Report as to convention practices of other State Bars (Appendix 4)
- 5) Report of law firm and other employer reimbursement policies (not attached)
- 6) Comparative hotel costs for Park City, Sun Valley and San Diego (Appendix 5)
- 7) The Report of the Bar's Summer Convention Review Committee from October 2015 (Appendix 6)
- 8) Bar's "Complimentary Convention Registrations" Policy (Appendix 7)

In addition, the Committee met with leaders of Utah Bar sections and affinity groups, addressing the value of the various conventions held by the Bar and their value to their section and group membership.

CONCLUSIONS

1. **Success of the Summer Convention and the other conventions can be defined by:**

- a. **Maintaining relatively stable attendance, defined as no significant declines from recent averages.**
 - b. **Maintaining financial independence, meaning that each convention, standing on its own, should be self-sustaining (not subsidized by the Bar); and,**
 - c. **Meeting subjective goals (which may vary slightly with each convention as further discussed in the summary below) such as providing high quality CLE and networking opportunities for members of the Bar. For example, the October 2015 Report of the Summer Convention Committee set forth proposed goals of the Summer Convention,¹ and Fall Forum has emphasized inexpensive CLE for small firm and solo practitioners.**
2. **The Bar's approach to the three major Bar conventions for the next five years should continue with the current schedule, with the exception of holding the Summer Convention in Park City in 2019, and probably 2020, to determine the viability of a local Summer Convention. The three conventions appear to satisfy needs of slightly different demographics in the Bar and should be continued.**

As to the Summer Convention, this Committee supports the Bar Commission's decision, made in October 2015, to hold a Summer Convention in Park City in 2019. Depending on its results, the Park City location could become part of a regular rotation involving Sun Valley and Southern California, or even a primary location for the Summer Convention. The Committee also offers for consideration in the future, should the attendance and financial goals of the conventions not be consistently met, the "Possible Alternatives" proposed in the 2015 Committee's Report.²

¹ The goals of the Summer Convention were identified by the 2015 Committee as follows:

- Serving as the annual business meeting of the Bar¹
- Providing unique and generally high quality CLE and speakers
- Providing social and networking opportunities for Bar members and their families
- Grooming and mentoring of future Bar leaders
- Fostering and preserving a tradition of Bar membership, Bar leadership and Judges socializing with and learning from each other, while promoting collegiality, professional respect and common purpose among the members of the Bar
- Remaining, along with the other major conventions of the Bar, financially self-sustaining so that the Convention is not supported by the Bar membership at large, most of whom do not attend the Convention

² The 2015 Committee suggested alternatives such as eliminating the Summer Convention entirely, moving the Fall Forum to summer and making it the "annual business meeting" for the Bar, and possibly replacing the Fall Forum

SUMMARY OF FINDINGS

As the 2015 Committee concluded, over time attendance at the Summer Convention in particular has dropped, particularly in relation to the increasing number of Bar members. This trend is likely the result of multiple factors including reductions in reimbursements from law firms, particularly to young lawyers,³ increased numbers of young lawyers practicing in solo or small firms, increased local and specialized CLE offerings, including from third-party CLE providers and specialized bar groups and sections, and increased expenses at out-of-state locations such as Sun Valley. On the other hand, it has been noted that attempts to relocate the Summer Convention to less expensive venues, such as Snowmass, Colorado, resulted in even further reduced attendance due to factors such as unfamiliarity to Bar members and increased travel distance.

It is also noted each of the three conventions appeals to slightly different audiences. The Summer Convention, while being the Bar's "Annual" Convention, is perceived by many Bar members as a convention for older attorneys and the larger Salt Lake City law firms. On the other hand, many Summer Convention attendees enjoy the tradition and have been coming with their families to socialize with other attorneys and judges. While the quality of CLE gets some mixed reviews, particularly from attorneys looking for specialized CLE, there is some enthusiasm for prominent speakers, including occasional Supreme Court justices.

The Spring Convention in St. George remains well-attended and financially viable, with the Spring 2017 Convention reaching its highest attendance since 2008. The attendance group at this convention is perceived to be a wider cross-section of Bar members including younger lawyers and more solo and small firm practitioners than attend the Summer Convention.

The Fall Forum has been successful in terms of attendance and profitability when it was limited to a one-day CLE event. The two-year experiment in 2015 and 2016 of taking it to a two-day event had substantial losses. Further, the Fall Forum, when operated as a one-day event, has had a focus on helping solo and small firm attorneys gain inexpensive CLE hours in a short period of time.

The survey of Bar members conducted by this Committee, as well as the discussion with Section and Affinity group leaders, confirmed various important assumptions that are important to the conclusions of this Committee, including:

with a convention away from the Wasatch Front as a replacement for the those who prefer the social aspects of an out-of-state convention.

³ This is confirmed by survey completed of Utah law firms and other employers, where there is usually a limited budget for CLE reimbursement, particularly for younger attorneys. And solo and small firm attorneys typically have no reimbursement at all.

- 1) The vast majority of Bar members do not attend the Summer Convention, citing primarily reasons of cost and relevant CLE;
- 2) A significant number of Bar members would like to see the Summer Convention held in Utah, in either Park City or Salt Lake City;
- 3) A smaller but still sizeable number of Bar members would like the Summer Convention to continue in Sun Valley (likely those who have been regular attenders); and,
- 4) Notably, a majority of Bar members who responded to the survey believe it is important that the Bar should continue holding the Summer Convention, even though a majority do not attend.⁴

In view of the survey results and feedback from Section and affinity group leaders, particularly that 1) the majority of Bar members do not attend the conventions; 2) the demographics of each convention is slightly different; and 3) there is at least a perception (which almost certainly reflects some reality) that the Summer Convention attendees are somewhat older and from generally larger firms, and because the overall cost of the Summer Convention is higher than the other two conventions, we recommend that each of the three conventions stand on its own financially so that the entire Bar membership is not subsidizing the Summer (or any other) Convention. As an example, if there are three, or even two years in a row that a particular convention loses money, or is not over time averaging a break-even financial scenario, the Bar Commission should seriously consider either discontinuing the convention in question or making some other significant changes, such as changing venues or merging it with another convention.

The Committee also noted that older attorneys attend both the Summer Convention and Spring Convention, at least in part, because it has become a tradition for them over many years of attendance. For that reason, the Committee believes involvement of the Young Lawyers Division of the Bar is critical to the success of all three conventions. For any of them to continue to succeed over time, young lawyers need to develop their own tradition of attendance at the conventions. Thus, formal involvement of the Young Lawyers' Division in the planning and presentation of each convention should be encouraged to the extent possible. That involvement should include, at least, participation on convention planning committees and we recommend convention chairs take steps to encourage active participation. For similar reasons, The Small Firm and Solo Practitioner section, and other affinity groups that may be underrepresented at the conventions, should be involved in the same way as well.

The Committee also recommends that convention committees, particularly for the Summer Convention, increase networking and social opportunities for solo and small firm attorneys who do not typically have the built-in network of a larger firm or office.

⁴ See responses to Survey Questions 18 and 19 (Appendix 2).

Additionally, during the course of the Committee's review, it was asked to comment on the Bar's "Complimentary Convention Registrations" policy, which addresses who should be provided complimentary registrations. A copy of the policy is attached hereto at Appendix 7. After due consideration, including in light of the survey of Bar members and feedback from Section and affinity group leaders, the Bar Commission should take care to provide complimentary registration only to those whose attendance contribute to the mission of the Bar generally or the goals of the convention in question. It is the view of the Committee that the complimentary registrations set forth in the policy, both those listed specifically in the Bar's Policies and Procedures Manual and "By Policy" as indicated, meet that criterion. The only issue the Committee has with the policy is that presently Fall Forum committee members and speakers receive a full complimentary registration, but committee members and speakers for the other two conventions only get a 50% discount. We recommend that this policy be harmonized so that committee members and speakers get a 50% discount at all three conventions.

The Committee also recommends that the cost of complimentary registrations for those whose attendance contribute to the mission of the Bar generally, as opposed to primarily for the benefit of the convention itself, should not be included or counted against the budget for the Convention. In the Committee's view, most of those on the list are "comped" for reasons of promoting the general mission of the Bar, including encouraging the attendance of Commissioners, Bar President and President-Elect, visiting bar presidents, award recipients, and attorney legislators. Others, including convention chairs, committee members, speakers, panel members and judges are attending more for the immediate benefit of planning, presenting or enhancing the convention itself.⁵

Finally, the Committee recommends that convention chairs should be well briefed and educated regarding budget and other Bar policies, including these recommendations, as they begin planning the conventions.

Respectfully submitted,

Summer Convention Review Committee, May 2017

H. Dickson Burton, Chair
 Rob Rice
 John Lund
 Heather Farnsworth
 Jonathan O. Hafen
 Doug Short
 Kristen Olsen

⁵ The Committee is not addressing here any ethical issues surrounding complimentary convention registrations to any of the identified groups.

Jaelynn Jenkins
Richard Dibblee

APPENDIX

1

SPRING CONVENTION			
Year/Resort	profit/-loss	total registered	comp'd registrant
1988 (St. George)		215	
1989 (St. George)		244	36
1990 (St. George)		157	13
1991 (St. George))		421	40
1992 (St. George)		286	55
1993 (St. George)		468	48
1994 (St. George)		455	72
1995 (St. George)		429	63
1997 (St. George)		461	70
1997 (St. George)		501	76
1998 (St. George)		501	60
1999 (St. George)		472	65
2000 (St. George)		435	40
2001 (St. George)		499	39
2002 (St. George)		406	31
2003 (St. George)		434	32
2004 (St. George)		470	61
2005 (St. George)		420	55
2006 (St. George)	\$5,154.00	426	64
2007 (St. George)	(\$4,576.00)	443	63
2008 (St. George)	\$27,441.00	492	87
2009 (St. George)	\$19,025.00	431	66
2010 (St. George)	\$20,027.00	430	43
2011 (St. George)	\$20,124.00	449	80
2012 (St. George)	\$3,673.00	420	69
2013 (St. George)	\$27,606.00	430	87
2014 (St. George)	\$36,899.00	480	88
2015 (St. George)	\$21,728.00	432	79
2016 (St. George)	\$35,124.00	397	66
2017 (St. George)	\$45,000.00	492	47

SUMMER CONVENTION			
Year/Resort	profit/-loss	total registered	comp'd registrant
1985 (Sun Valley)		188	12
1986 (Sun Valley)		282	0
1987 (Utah)		226	25
1988 (Calif)		352	24
1989 (Sun Valley)		307	30
1990 (COLO)	32,728.00	408	45
1991 (Sun Valley)	20,392.00	534	66
1992 (Sun Valley)	15,711.00	488	87
1993 (Sun Valley)	17,480.00	605	73
1994 (Sun Valley)	-12,033.00	514	44
1995 (San Diego)Hotel Del Coronado	30,498.00	455	57
1997 (Sun Valley)	-10,346.00	526	71
1997 (Sun Valley)	21,612.00	527	53
1998 (Sun Valley)	18,932.00	541	42
1999 (Sun Valley)	-18,674.00	568	8
2000 (San Diego)Hotel Del Coronado	21,515.00	479	49
2001 (Sun Valley)	-10,202.00	542	18
2002 (Sun Valley)		327	39
2003 (Sun Valley)	-4,356.00	496	33
2004 (Sun Valley)	-2,262.00	350	57
2005 (Sun Valley))	3,210.00	438	29
2006 (Newport)Newport Beach Marriott	-32,250.00	367	3
2007 (Sun Valley)	3,707.00	450	53
2008 (Sun Valley)	10,097.00	419	67
2009 (Sun Valley)	18,236.00	424	38
2010 (Sun Valley)	12,086.00	359	34
2011 (San Diego) Manchester Grand Hyatt	-11,692.00	381	65
2012 (Sun Valley)	-31,196.00	385	79
2013 (Snowmass)	-101,418.00	329	90
2014 (Snowmass)	-118,693.00	281	103
2015 (Sun Valley)	-11,790.00	409	80
2016 (San Diego) Loews	-5,242.00	358	56
2017 (Sun Valley) projected	-125.00	459	35

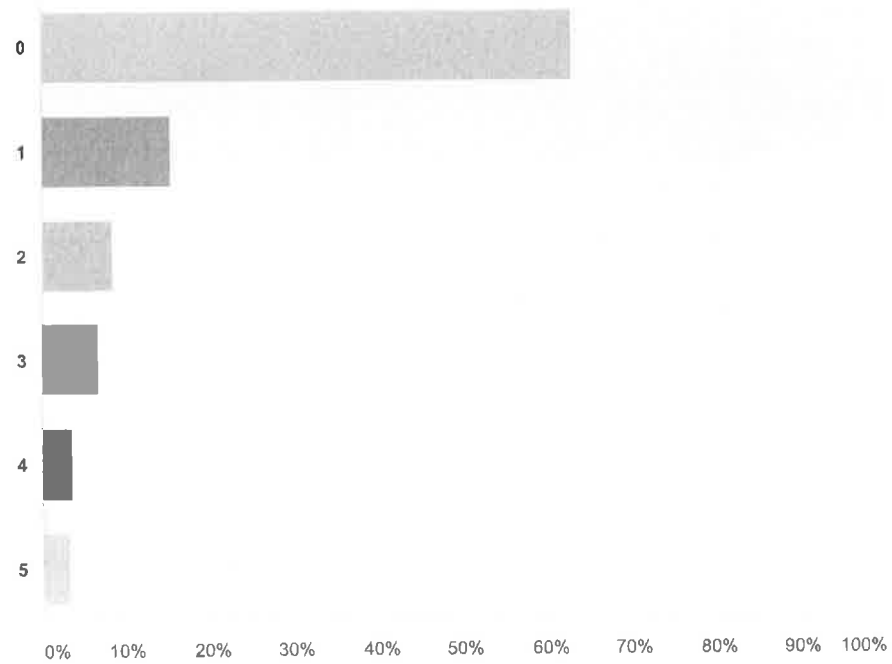
FALL FORUM			
Year/Resort	profit/-loss	total registered	comp'd registrant
2003 (Salt Lake Univ. Park Marriott)		388	
2004 (Salt Lake Univ. Park Marriott)		242	84
2005 (Salt Lake Little America)	\$15,886.00	506	33
2006 (Salt Lake Little America)	\$7,697.00	525	70
2007 (Salt Lake Little America)	\$14,103.00	589	80
2008 (Salt Lake Little America)	\$15,829.00	540	60
2009 (Salt Lake Downtown Marriott)	\$26,154.00	726	46
2010 (Salt Lake Salt Palace)	(\$3,237.00)	514	48
2011 (Salt Lake Little America)	\$2,205.00	575	67
2012 (Salt Lake Little America)	\$4,708.00	479	120
2013 (Salt Lake Little America)	(\$12,299.00)	369	67
2014 (Salt Lake Little America)	\$13,750.00	473	84
2015 (Salt Lake Grand America)	(\$22,526.00)	318(30 lunch/recep only)	47
2016 (Salt Lake Little America)	(\$30,000.00)	384	15

APPENDIX

2

Q1 Please indicate the number of Summer Conventions you have attended personally in the last 5 years?

Answered: 906 Skipped: 3

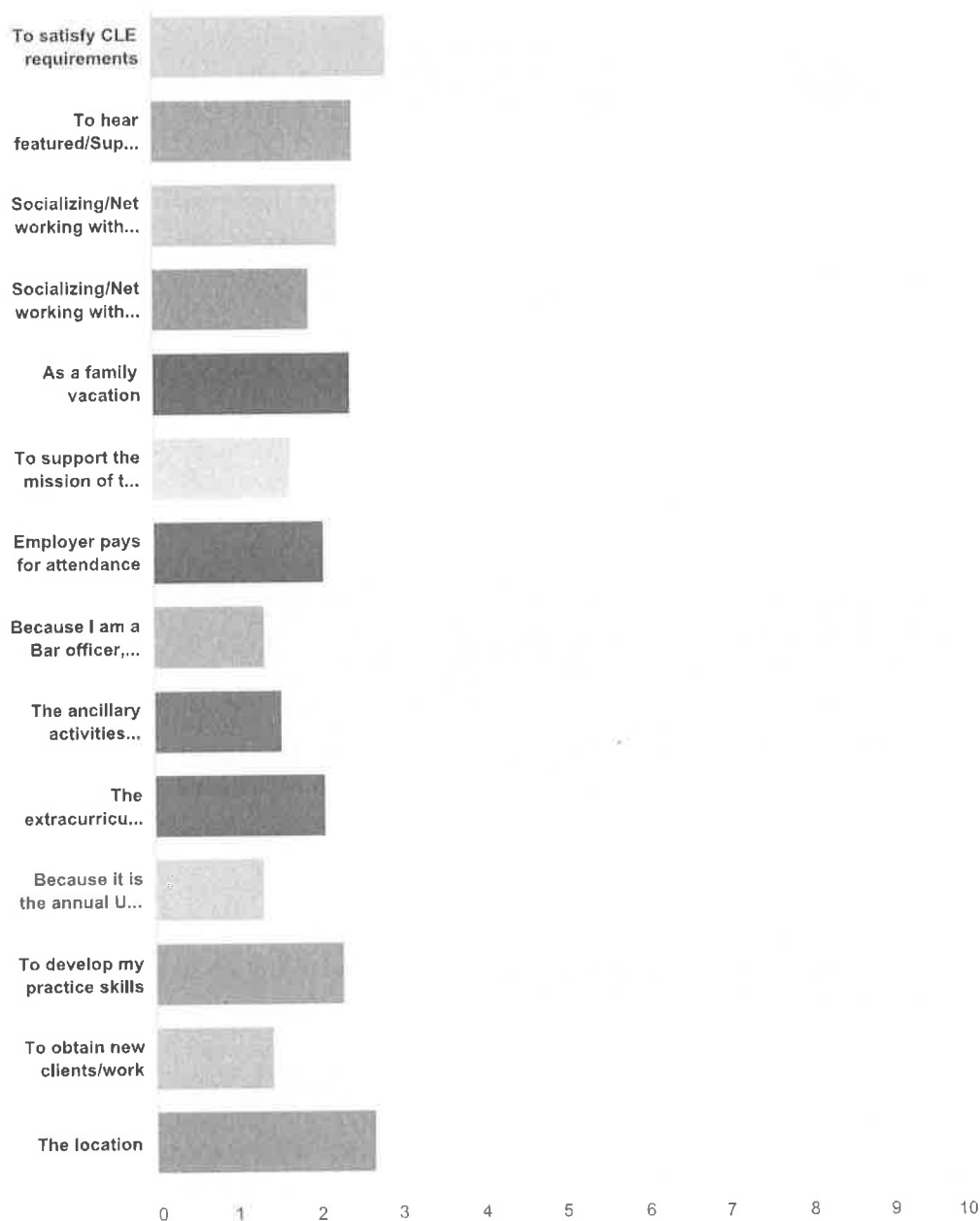


Answer Choices	Responses	
0	62.80%	569
1	15.34%	139
2	8.39%	76
3	6.73%	61
4	3.53%	32
5	3.20%	29
Total		906

2017 Survey on Bar Conventions

Q2 Please rank all of the motivators for you personally attending past Summer Conventions on a scale of 1-4 (1 being no motivation, 4 being highly motivating):

Answered: 690 Skipped: 219



	1	2	3	4	Total	Weighted Average
To satisfy CLE requirements	19.02% 128	16.64% 112	24.52% 165	39.82% 268	673	2.85

2017 Survey on Bar Conventions

To hear featured/Supreme Court speakers	27.88% 184	22.58% 149	27.42% 181	22.12% 146	660	2.44
Socializing/Networking with fellow members of the Bar	30.23% 201	29.02% 193	25.26% 168	15.49% 103	665	2.26
Socializing/Networking with Judges	44.95% 294	28.59% 187	16.97% 111	9.48% 62	654	1.91
As a family vacation	34.03% 227	16.94% 113	23.39% 156	25.64% 171	667	2.41
To support the mission of the Bar	56.05% 366	24.35% 159	15.62% 102	3.98% 26	653	1.68
Employer pays for attendance	50.92% 331	11.08% 72	18.77% 122	19.23% 125	650	2.06
Because I am a Bar officer, section leader, committee member, etc.	83.10% 531	6.26% 40	4.23% 27	6.42% 41	639	1.34
The ancillary activities (golf tournament, socials, fun run, etc.)	64.42% 420	20.40% 133	11.35% 74	3.83% 25	652	1.55
The extracurricular activities (bike riding, restaurants, golf, fishing, hiking, etc.)	44.76% 295	17.00% 112	24.89% 164	13.35% 88	659	2.07
Because it is the annual Utah State Bar business meeting	78.24% 507	14.66% 95	4.63% 30	2.47% 16	648	1.31
To develop my practice skills	31.28% 203	24.04% 156	31.43% 204	13.25% 86	649	2.27
To obtain new clients/work	73.99% 475	14.49% 93	7.94% 51	3.58% 23	642	1.41
The location	26.63% 176	14.37% 95	25.11% 166	33.89% 224	661	2.66

2017 Survey on Bar Conventions

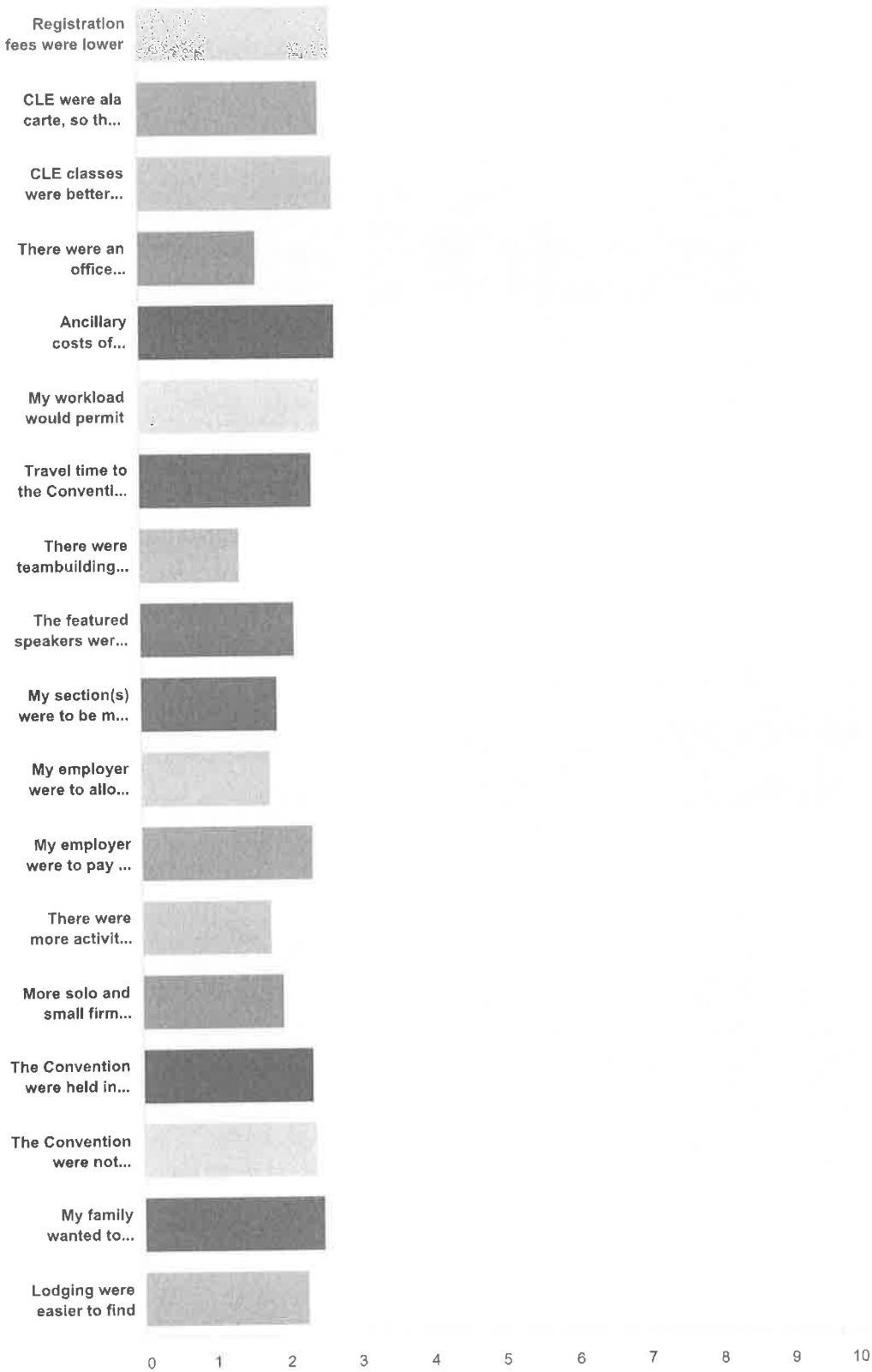
Q3 If you have not attended a Summer Convention in the last 5 years, please explain why not:

Answered: 608 Skipped: 301

Q4 Please rank the following possible changes, on a scale of 1-4 (1 being no motivation, 4 being highly motivating) as to whether it would likely increase your attendance at the Summer Convention. I would attend more often if:

Answered: 866 Skipped: 43

2017 Survey on Bar Conventions



	1	2	3	4	Total	Weighted Average
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2017 Survey on Bar Conventions

Registration fees were lower	23.11% 189	19.80% 162	22.62% 185	34.47% 282	818	2.68
CLE were ala carte, so that I would only pay for the classes I actually attend	28.91% 235	19.07% 155	24.85% 202	27.18% 221	813	2.50
CLE classes were better quality or more relevant	19.31% 156	22.15% 179	28.09% 227	30.45% 246	808	2.70
There were an office management/technology symposium with presentations by vendors included	60.07% 483	22.26% 179	12.69% 102	4.98% 40	804	1.63
Ancillary costs of attending (accommodations, food, travel, etc.) were lower	20.51% 170	21.47% 178	24.25% 201	33.78% 280	829	2.71
My workload would permit	26.82% 217	21.26% 172	27.32% 221	24.60% 199	809	2.50
Travel time to the Convention were less	29.76% 244	25.12% 206	21.95% 180	23.17% 190	820	2.39
There were teambuilding or other organization presentations available	73.52% 583	17.53% 139	6.05% 48	2.90% 23	793	1.38
The featured speakers were better	34.17% 271	31.27% 248	23.20% 184	11.35% 90	793	2.12
My section(s) were to be more involved in CLE or social activities	48.10% 379	25.76% 203	16.75% 132	9.39% 74	788	1.87
My employer were to allow time to attend	61.55% 485	14.97% 118	7.49% 59	15.99% 126	788	1.78
My employer were to pay for me to attend	44.90% 361	9.70% 78	11.32% 91	34.08% 274	804	2.35
There were more activities designed to assist me in making new contacts	53.94% 424	22.77% 179	14.89% 117	8.40% 66	786	1.78
More solo and small firm attorneys attended	50.12% 403	19.15% 154	16.42% 132	14.30% 115	804	1.95
The Convention were held in a better location	36.33% 291	19.48% 156	19.10% 153	25.09% 201	801	2.33
The Convention were not oriented to larger firms	35.22% 286	18.47% 150	17.98% 146	28.33% 230	812	2.39
My family wanted to vacation at the location	33.54% 270	15.40% 124	19.13% 154	31.93% 257	805	2.49
Lodging were easier to find	32.45% 256	27.00% 213	23.32% 184	17.24% 136	789	2.25

**Q5 Is there any other change that would
motivate you to attend more often?**

Answered: 319 Skipped: 590

2017 Survey on Bar Conventions

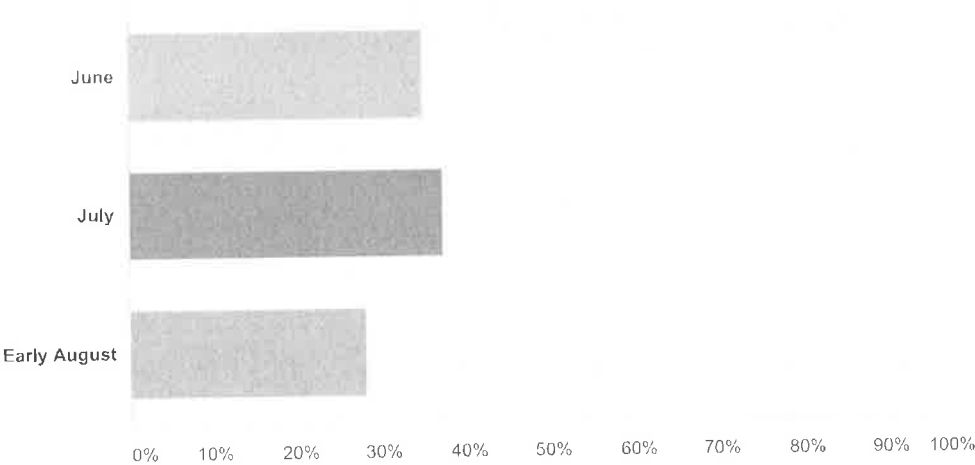
Q6 What extracurricular activities are the most important to you?

Answered: 346 Skipped: 563

2017 Survey on Bar Conventions

Q7 When would you prefer the Summer Convention be held?

Answered: 791 Skipped: 118

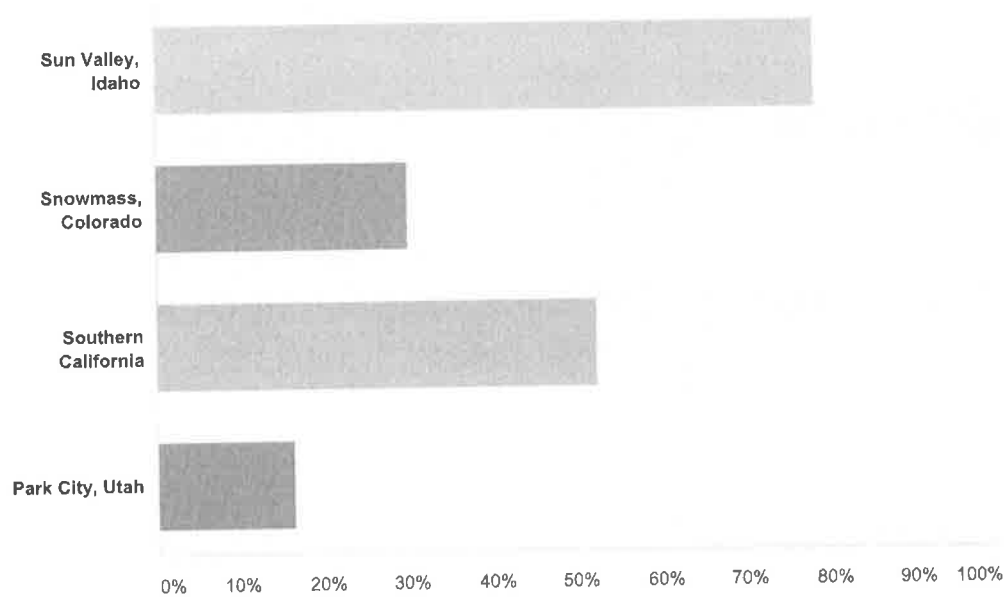


Answer Choices	Responses	
June	34.77%	275
July	37.17%	294
Early August	28.07%	222
Total		791

2017 Survey on Bar Conventions

Q8 Which of the following locations have you attended for a Summer Convention?

Answered: 473 Skipped: 436

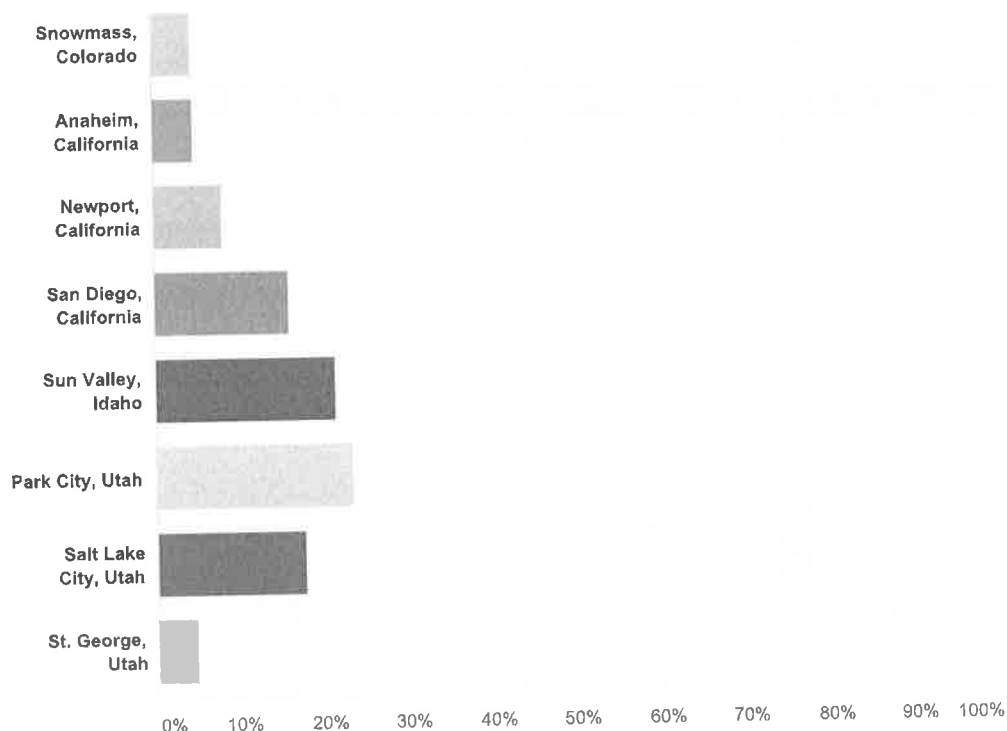


Answer Choices	Responses	
Sun Valley, Idaho	78.01%	369
Snowmass, Colorado	29.81%	141
Southern California	52.22%	247
Park City, Utah	16.28%	77
Total Respondents: 473		

2017 Survey on Bar Conventions

Q9 Please select where you would prefer to attend the Summer Convention (Choose one):

Answered: 837 Skipped: 72

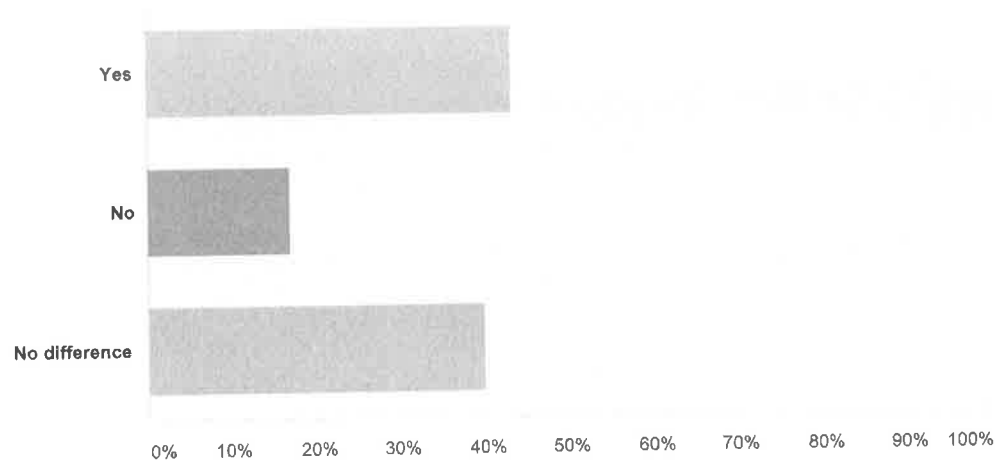


Answer Choices	Responses	
Snowmass, Colorado	4.54%	38
Anaheim, California	4.78%	40
Newport, California	8.24%	69
San Diego, California	15.77%	132
Sun Valley, Idaho	21.27%	178
Park City, Utah	23.18%	194
Salt Lake City, Utah	17.56%	147
St. George, Utah	4.66%	39
Total		837

2017 Survey on Bar Conventions

Q10 Would you be more likely to attend the Summer Convention if the location were rotated?

Answered: 847 Skipped: 62

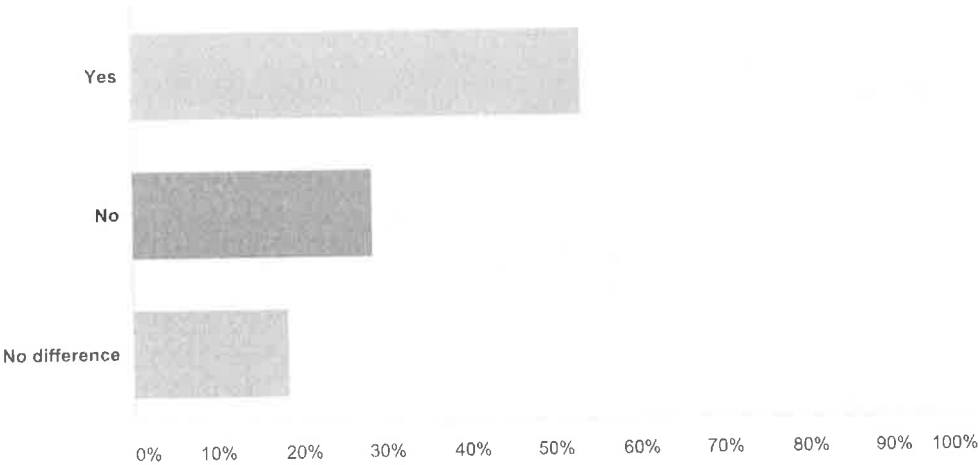


Answer Choices	Responses	
Yes	43.21%	366
No	16.88%	143
No difference	39.91%	338
Total		847

2017 Survey on Bar Conventions

Q11 Would you more likely attend the Summer Convention if it were held in Park City?

Answered: 866 Skipped: 45

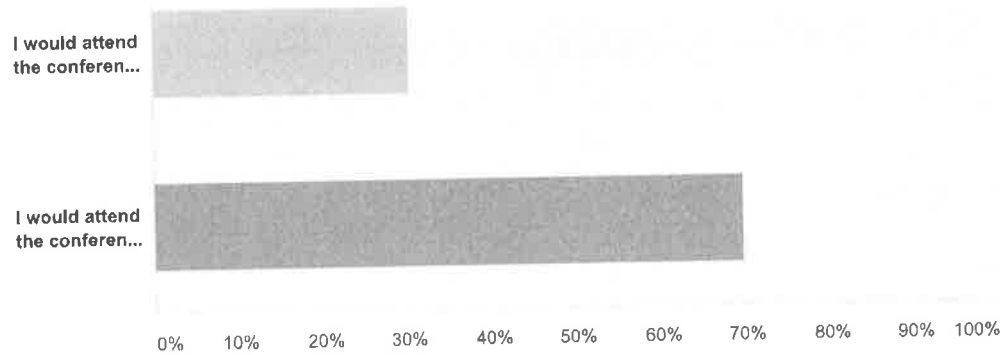


Answer Choices	Responses	
Yes	53.23%	461
No	28.29%	245
No difference	18.48%	160
Total		866

2017 Survey on Bar Conventions

Q12 If the Summer Convention were held in Park City, Utah, which of the following would most likely apply to you?

Answered: 830 Skipped: 79

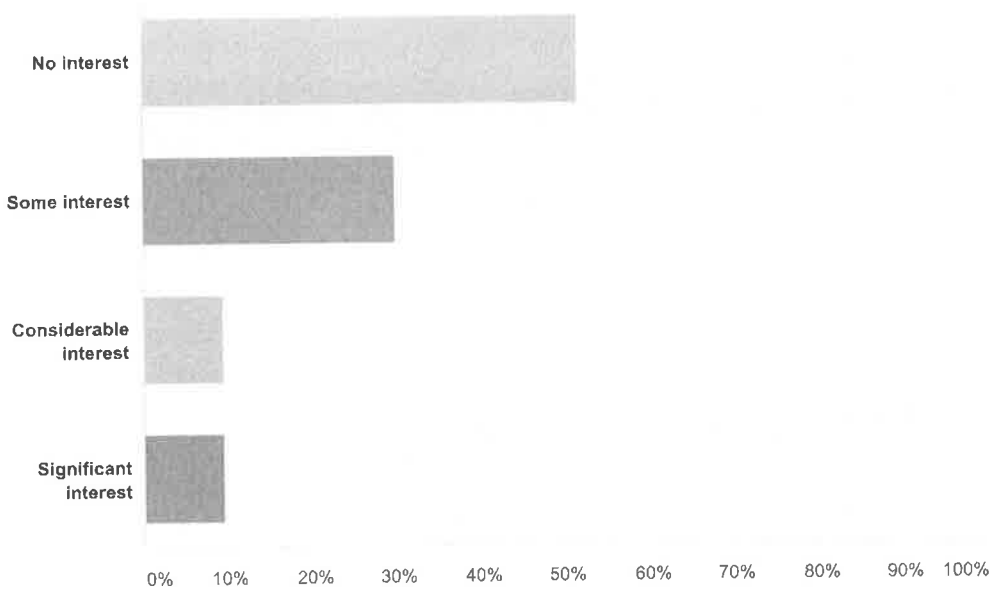


Answer Choices	Responses	
I would attend the conference and stay in Park City overnight	30.24%	251
I would attend the conference but return home each evening	69.76%	579
Total		830

2017 Survey on Bar Conventions

Q13 How interested would you be in a CLE cruise sponsored by the Bar?

Answered: 880 Skipped: 29

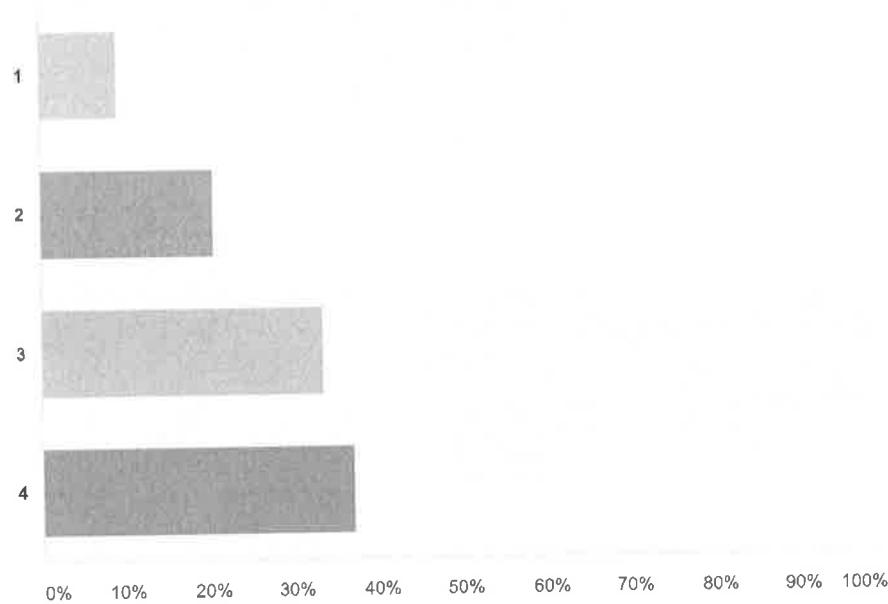


Answer Choices	Responses	
No interest	51.48%	453
Some interest	29.89%	263
Considerable interest	9.32%	82
Significant interest	9.32%	82
Total		880

2017 Survey on Bar Conventions

Q14 On a scale of 1-4, (1 being not important, 4 being most important) how important is the overall cost of attending a convention to your decision whether to attend?

Answered: 878 Skipped: 31

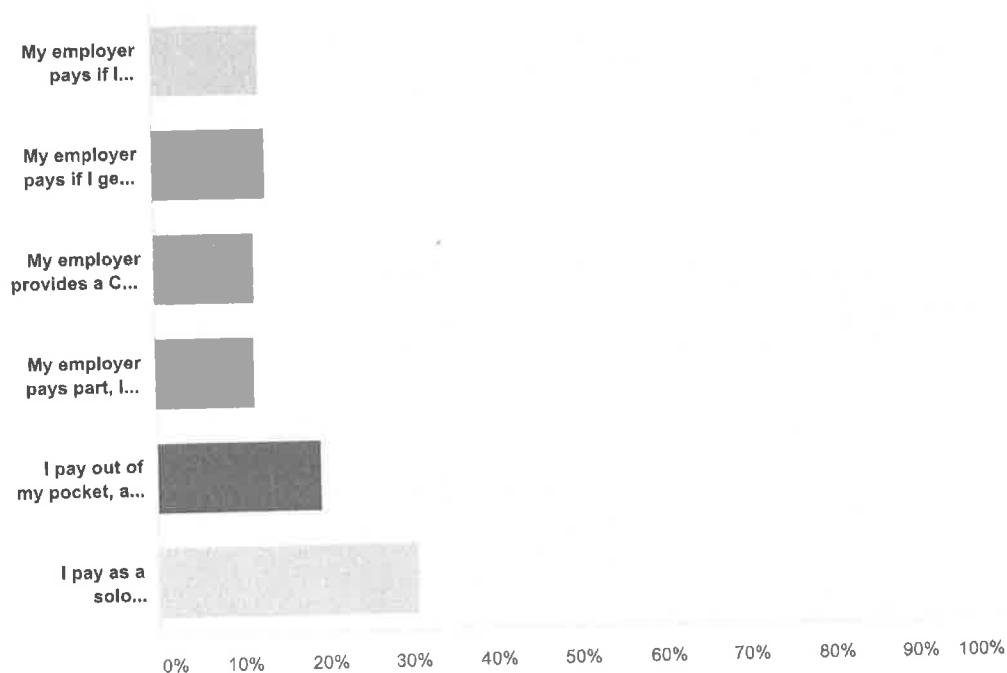


Answer Choices	Responses	
1	9.23%	81
2	20.39%	179
3	33.37%	293
4	37.02%	325
Total		878

2017 Survey on Bar Conventions

Q15 Who would most likely pay for you to attend the next Summer Convention if you decided to attend? (Select the answer that most closely fits your situation)

Answered: 884 Skipped: 25

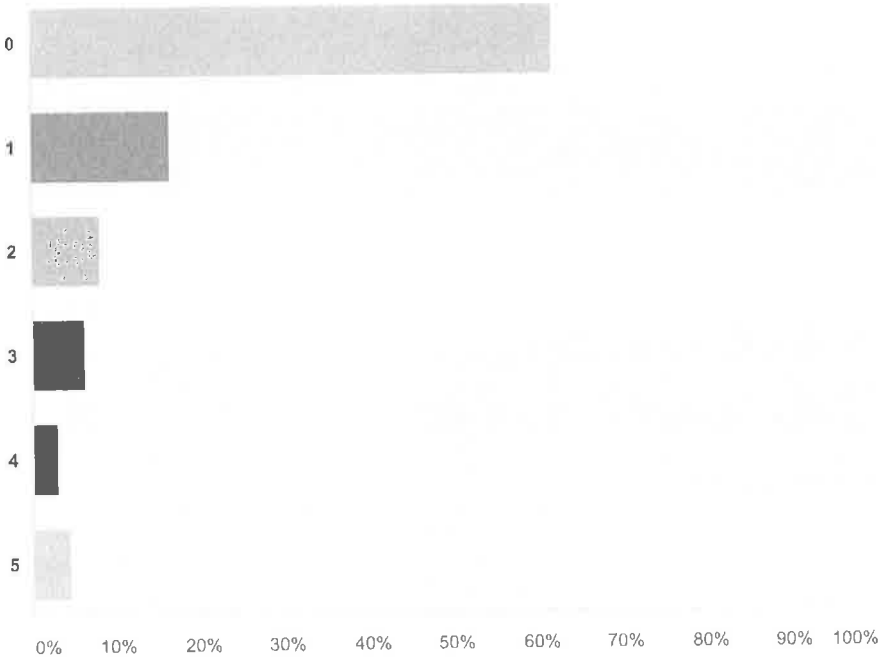


Answer Choices	Responses	
	Percentage	Count
My employer pays if I request it.	12.78%	113
My employer pays if I get approval.	13.46%	119
My employer provides a CLE budget which I may use at my discretion to attend.	11.99%	106
My employer pays part, I pay the rest.	11.65%	103
I pay out of my pocket, as an employee.	19.34%	171
I pay as a solo practitioner or small firm owner.	30.77%	272
Total		884

2017 Survey on Bar Conventions

Q16 How often have you attended the Spring Convention in the last 5 years?

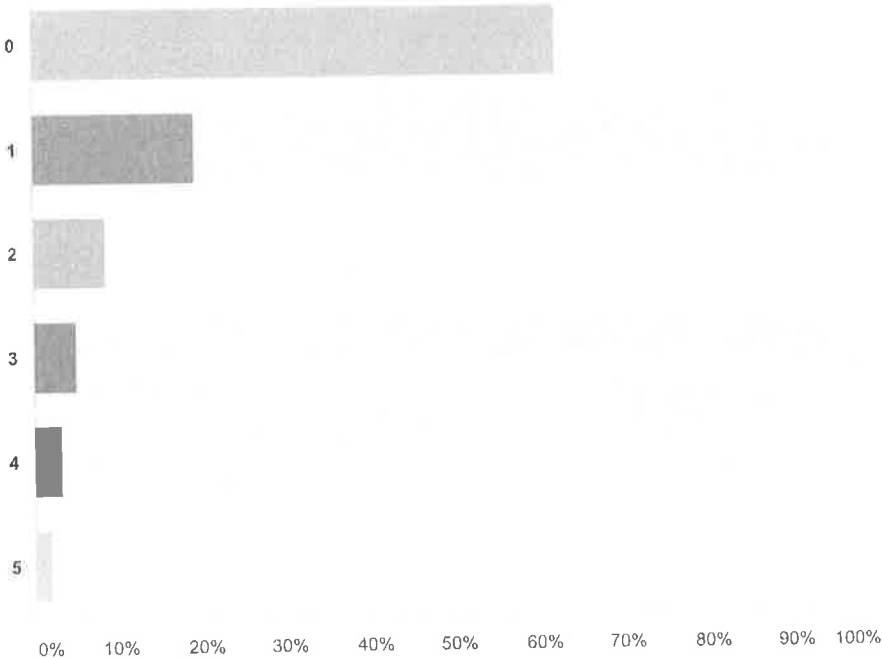
Answered: 883 Skipped: 26



Answer Choices	Responses	
0	61.83%	546
1	16.53%	146
2	8.15%	72
3	6.34%	56
4	2.83%	25
5	4.30%	38
Total		883

Q17 How often have you attended the Fall Forum in the last 5 years?

Answered: 891 Skipped: 18

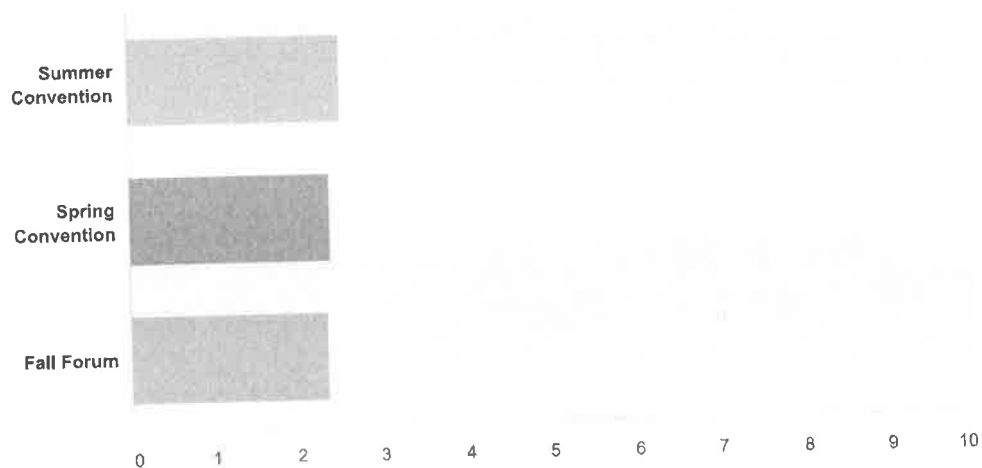


Answer Choices	Responses	
0	61.95%	552
1	19.30%	172
2	8.64%	77
3	5.05%	45
4	3.25%	29
5	1.80%	16
Total		891

2017 Survey on Bar Conventions

Q18 Please rank the following on a scale of 1-4 (1 being not important, 4 being very important) as to how important it is that the Bar continues to hold the following:

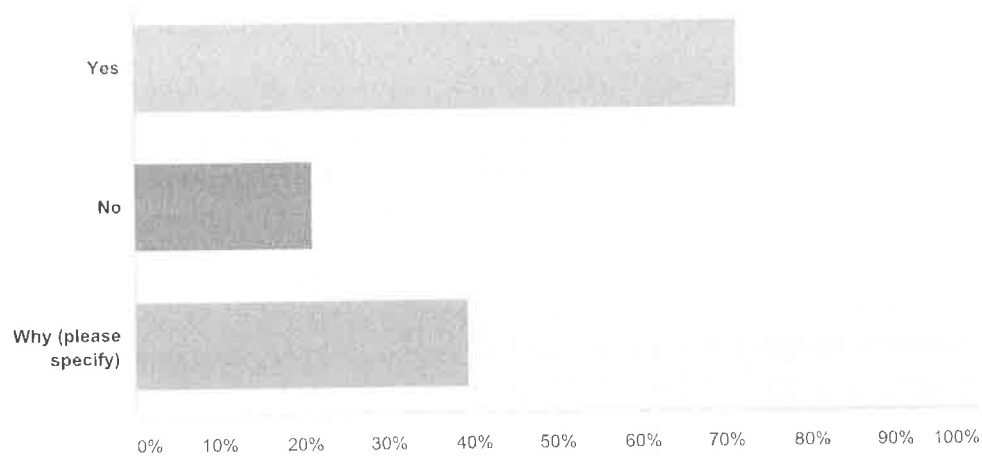
Answered: 848 Skipped: 61



	1	2	3	4	Total	Weighted Average
Summer Convention	29.02% 242	20.26% 169	19.18% 160	31.53% 263	834	2.53
Spring Convention	30.82% 257	22.90% 191	24.70% 206	21.58% 180	834	2.37
Fall Forum	32.65% 270	25.15% 208	18.62% 154	23.58% 195	827	2.33

Q19 Do you believe the Summer Convention should continue?

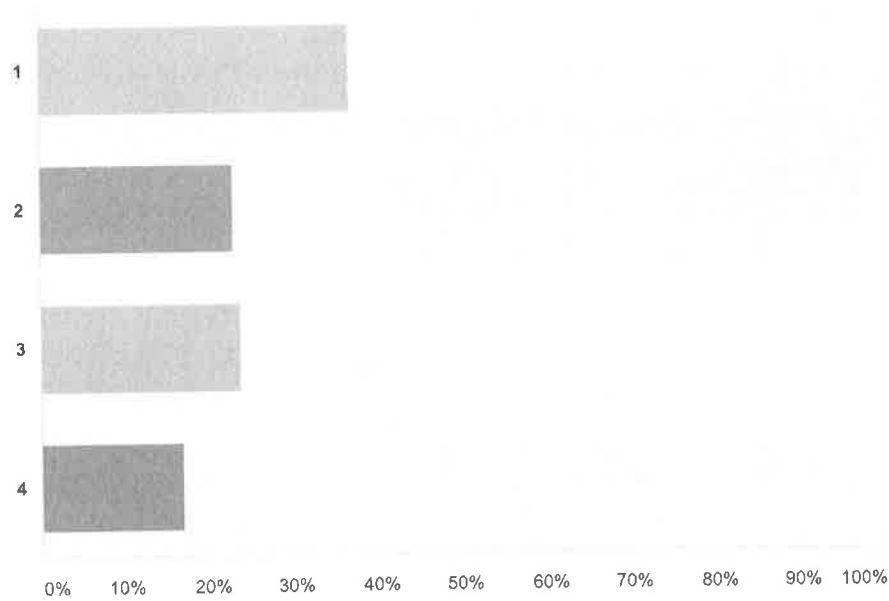
Answered: 784 Skipped: 125



Answer Choices	Responses	
Yes	71.43%	560
No	21.17%	166
Why (please specify)	39.54%	310
Total Respondents: 784		

Q20 If the judges were having their annual convention in concert with the Summer Convention, and would be in attendance at many of the events, on a scale of 1-4 (1 being not important, 4 being very important) how important would that fact be in your decision whether to attend?

Answered: 862 Skipped: 47



Answer Choices		Responses	
		36.77%	317
1			
		22.85%	197
2			
		23.67%	204
3			
		16.71%	144
4			
Total			862

2017 Survey on Bar Conventions

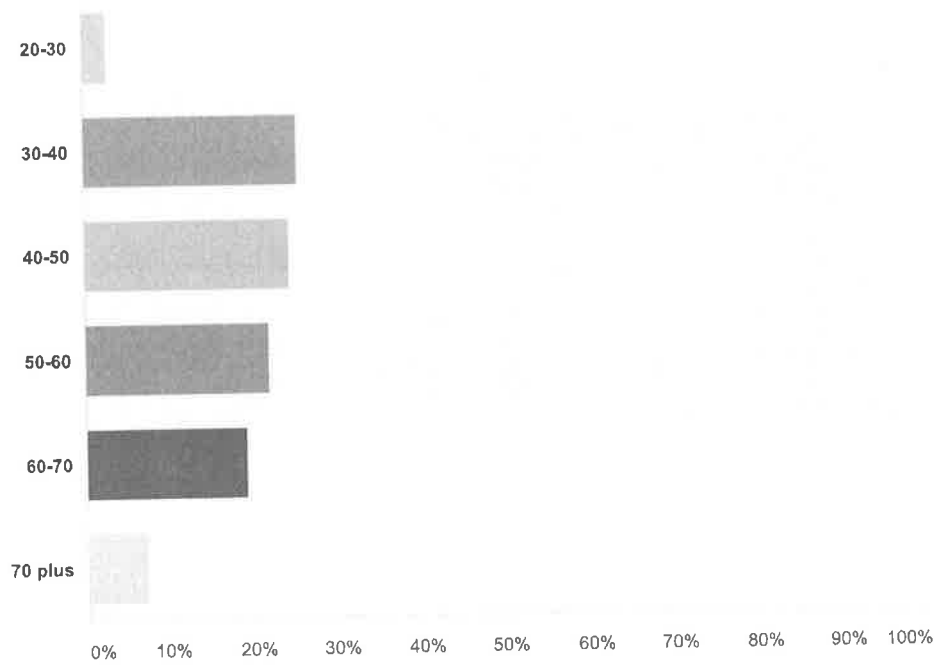
Q21 Please provide any additional comments you would like to make about the Summer Convention, Spring Convention, or Fall Forum that we have not addressed:

Answered: 193 Skipped: 716

2017 Survey on Bar Conventions

Q22 What is your age?

Answered: 881 Skipped: 28

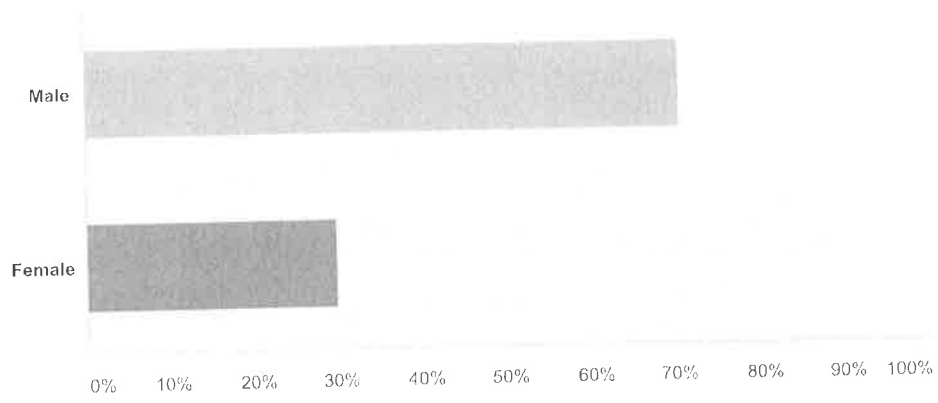


Answer Choices	Responses
20-30	2.84%25
30-40	25.31%223
40-50	24.18%213
50-60	21.68%191
60-70	18.96%167
70 plus	7.04%62
Total	881

2017 Survey on Bar Conventions

Q23 What is your gender?

Answered: 878 Skipped: 31

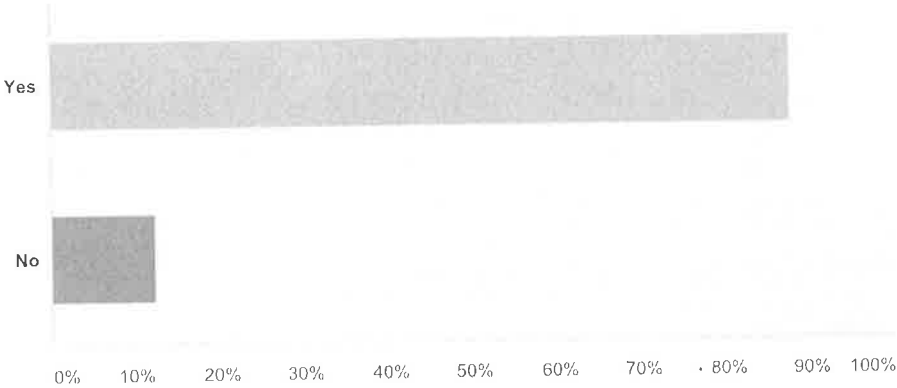


Answer Choices		Responses	
Male		70.27%	617
Female		29.73%	261
Total			878

2017 Survey on Bar Conventions

Q24 Are you currently actively practicing law?

Answered: 889 Skipped: 20

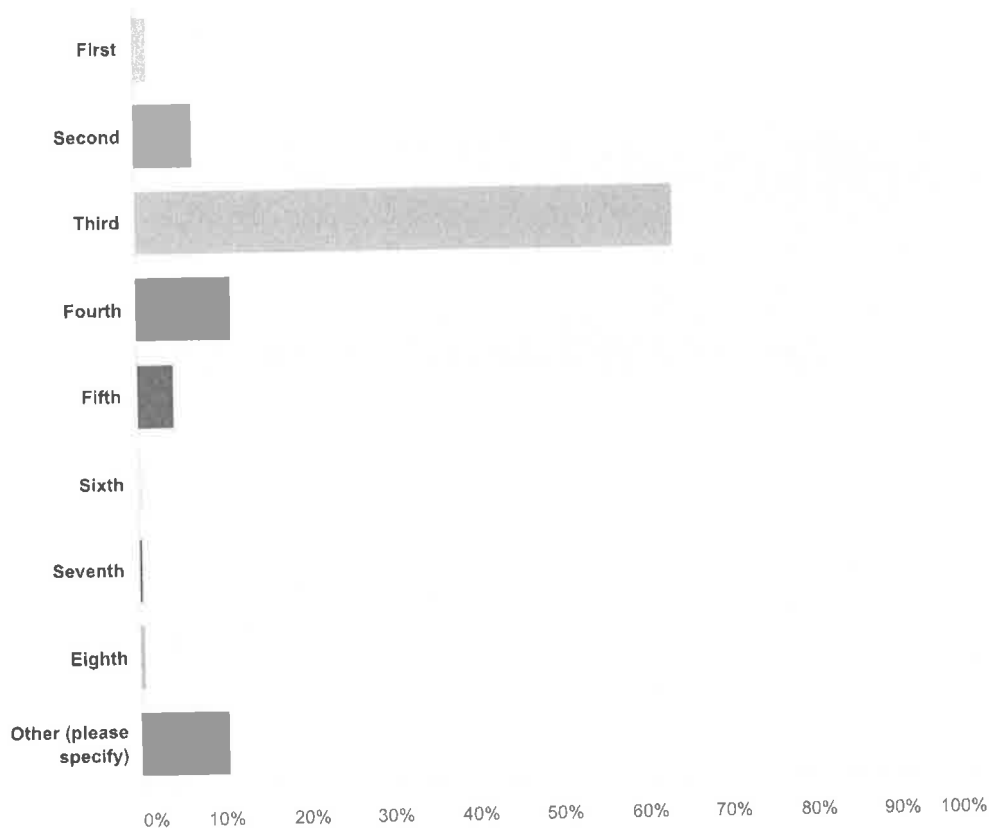


Answer Choices	Responses	
Yes	87.74%	780
No	12.26%	109
Total		889

2017 Survey on Bar Conventions

Q25 In which Judicial District is your practice primarily located?

Answered: 860 Skipped: 49

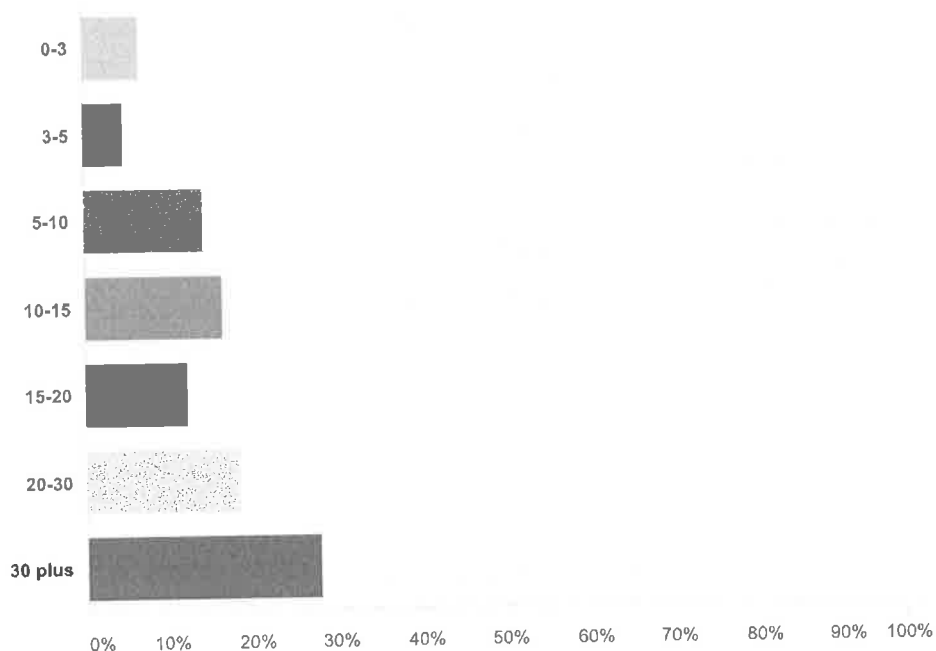


Answer Choices	Responses	
First	1.63%	14
Second	6.98%	60
Third	63.72%	548
Fourth	11.28%	97
Fifth	4.42%	38
Sixth	0.58%	5
Seventh	0.47%	4
Eighth	0.58%	5
Other (please specify)	10.35%	89
Total		860

2017 Survey on Bar Conventions

Q26 How many years have you been in practice?

Answered: 873 Skipped: 36

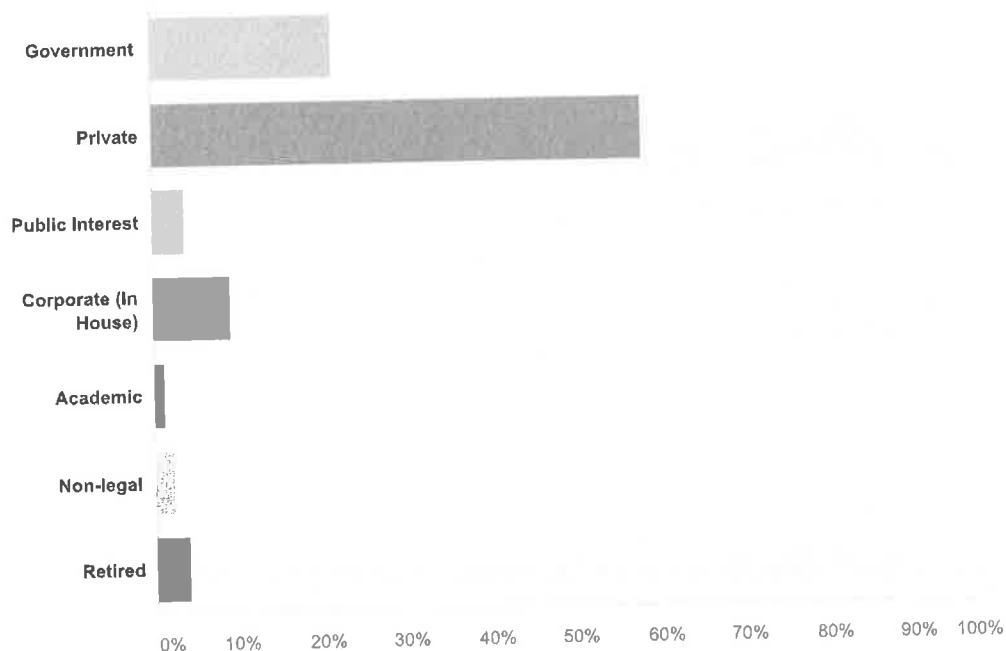


Answer Choices	Responses	
0-3	6.64%	58
3-5	4.81%	42
5-10	14.20%	124
10-15	16.27%	142
15-20	12.14%	106
20-30	18.10%	158
30 plus	27.84%	243
Total		873

2017 Survey on Bar Conventions

Q27 What is the primary nature of your practice?

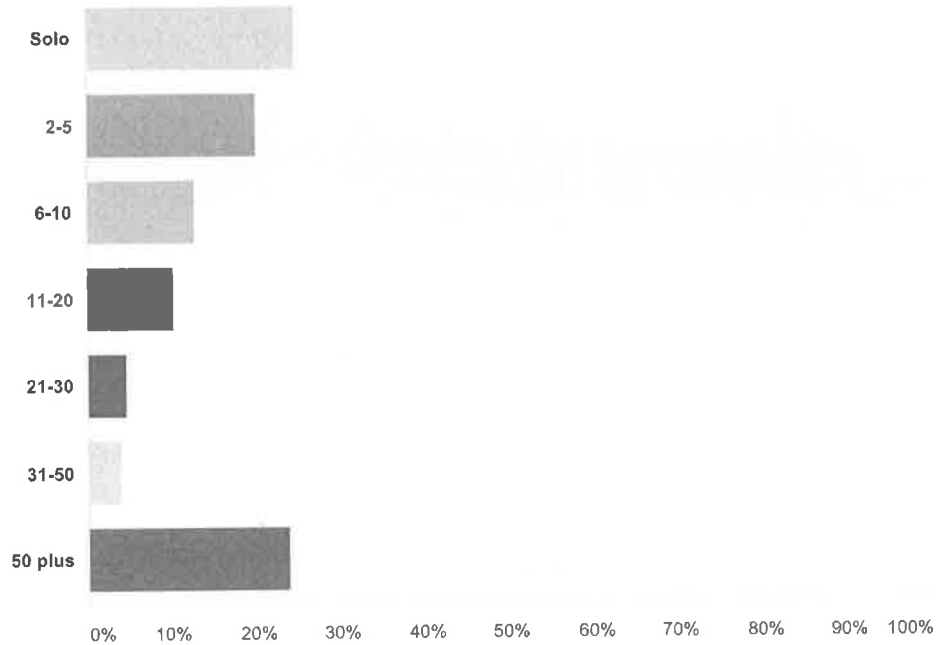
Answered: 873 Skipped: 36



Answer Choices	Responses	
Government	21.53%	188
Private	58.08%	507
Public Interest	3.67%	32
Corporate (In House)	9.16%	80
Academic	1.26%	11
Non-legal	2.29%	20
Retired	4.01%	35
Total		873

Q28 How many attorneys are employed at your firm/entity?

Answered: 843 Skipped: 66

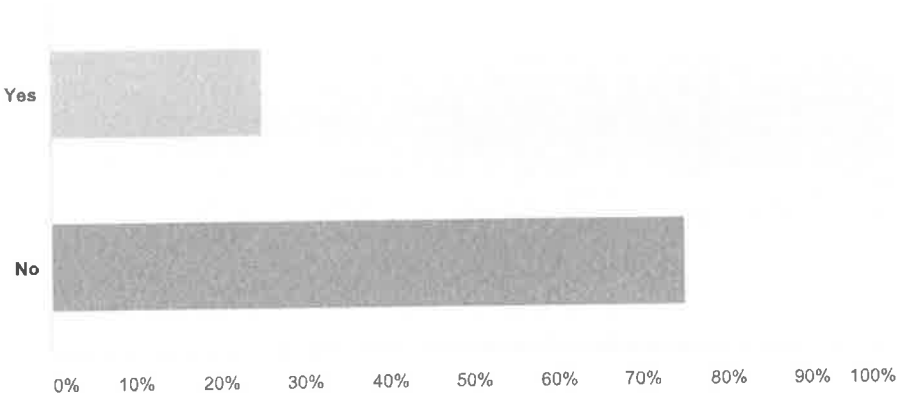


Answer Choices	Responses	
Solo	24.56%	207
2-5	20.05%	169
6-10	12.81%	108
11-20	10.20%	86
21-30	4.51%	38
31-50	4.03%	34
50 plus	23.84%	201
Total		843

2017 Survey on Bar Conventions

Q29 Do you currently serve on any Utah Bar related committees, commissions, sections, groups, Advisory Committees, etc.

Answered: 889 Skipped: 20



Answer Choices	Responses	
Yes	25.08%	223
No	74.92%	666
Total		889

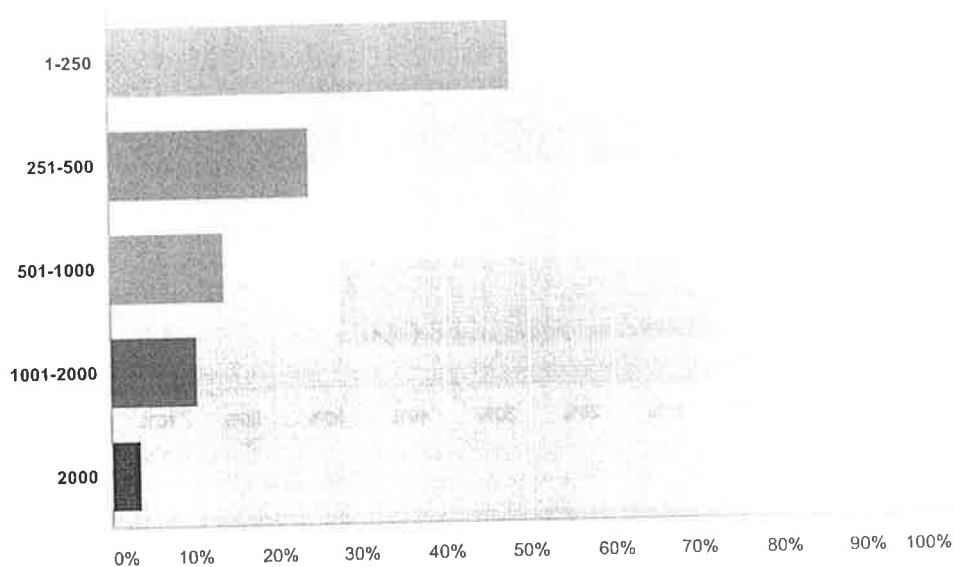
APPENDIX

3

2017 Section Chair Survey on Conventions

Q1 How large is your section/group membership?

Answered: 29 Skipped: 0

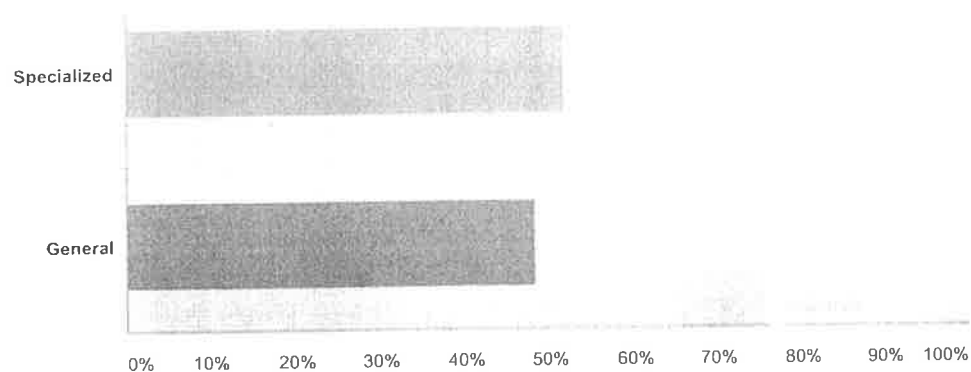


Answer Choices	Responses	
1-250	48.28%	14
251-500	24.14%	7
501-1000	13.79%	4
1001-2000	10.34%	3
2000	3.45%	1
Total		29

2017 Section Chair Survey on Conventions

Q2 Would you consider your section/group members' practices to be more "specialized" or "general"?

Answered: 29 Skipped: 0

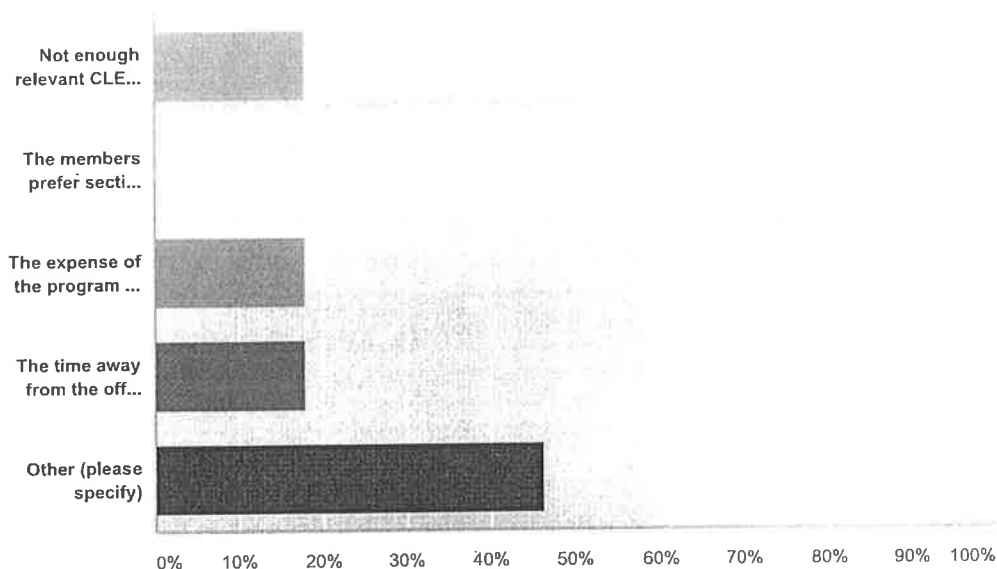


Answer Choices	Responses	
Specialized	51.72%	15
General	48.28%	14
Total		29

2017 Section Chair Survey on Conventions

Q3 Are there any reasons you are aware of as to why any of your section/group members might not be attending Summer Conventions?

Answered: 28 Skipped: 1



Answer Choices	Responses	
Not enough relevant CLE topics for section members	17.86%	5
The members prefer section provided CLEs	0.00%	0
The expense of the program is too high	17.86%	5
The time away from the office it too long.	17.86%	5
Other (please specify)	46.43%	13
Total		28

#	Other (please specify)	Date
1	in my experience, all of these are reasons for lack of attendance.	1/25/2017 4:23 PM
2	The travel distance and related expense has been mentioned.	1/25/2017 10:07 AM
3	Distance to Travel to Sun Valley	1/24/2017 5:38 PM
4	I do not know the answer here. Those that specialize in franchising have national conferences that are very important to attend.	1/24/2017 11:01 AM
5	Many of the section members allocate CLE budget towards Rocky Mountain Mineral Law Foundation and/or ABA Environmental conferences that are more directed to their individual practice areas.	1/24/2017 11:00 AM
6	Not really sure about others, but for me it's been the first and fourth reasons.	1/23/2017 2:56 PM
7	I don't know the answer to this for our Section members; we haven't polled them to get feedback about this.	1/20/2017 4:23 PM

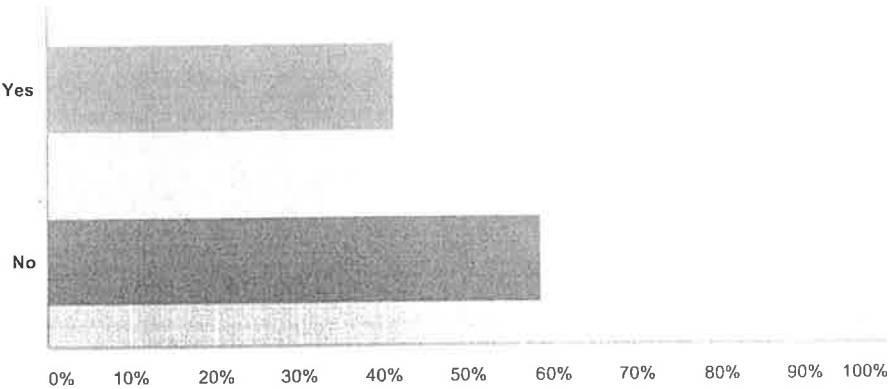
2017 Section Chair Survey on Conventions

8	It's a combination of cost, time away from the office, and the particular demographics of my section. Specifically, Utah County attorneys are, for the most part, family and Church-focused, which means their summer time off is dedicated to family vacations and Church-related trips (i.e., girl's camp, scout camp, etc.).	1/19/2017 8:59 AM
9	I think for the younger attorneys, the expense of the meeting is too high. I think many young lawyers are hesitant to ask for firm money to pay for generalized training rather than specific to their practice. Many don't realize the value of the networking that can occur at the meeting.	1/17/2017 10:51 AM
10	Many/most of our members work for gov't agencies/small firms that won't pay for travel and attendance costs	1/17/2017 8:59 AM
11	Cost too high, CLEs too general, time away from the office is too long. Would rather use vacation days for other purposes and would rather attend CLEs on specific areas of law relevant to their practice.	1/16/2017 10:21 AM
12	travel	1/13/2017 5:36 PM
13	Our national trade group provides an annual two and half day law conference that many of our members attend. I think many of us get our CLE's from that conference.	1/13/2017 5:14 PM

2017 Section Chair Survey on Conventions

Q4 Does your section or group provide an annual conference designed more specifically for your membership?

Answered: 29 Skipped: 0

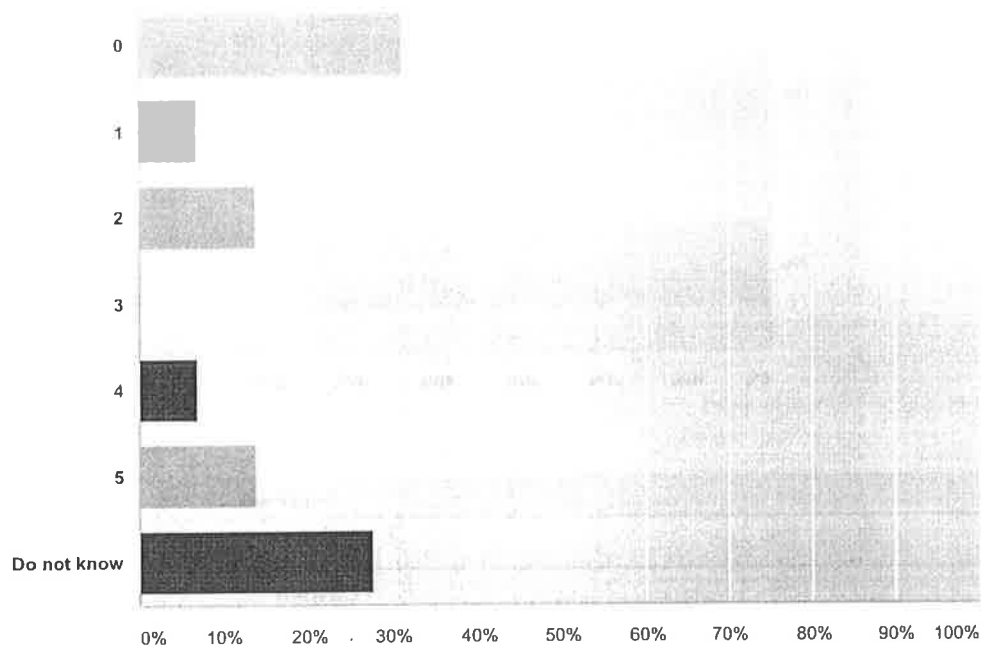


Answer Choices	Responses	
Yes	41.38%	12
No	58.62%	17
Total		29

2017 Section Chair Survey on Conventions

Q5 How often has your section/group hosted a CLE breakout session at the Summer Convention in the last 5 years?

Answered: 29 Skipped: 0

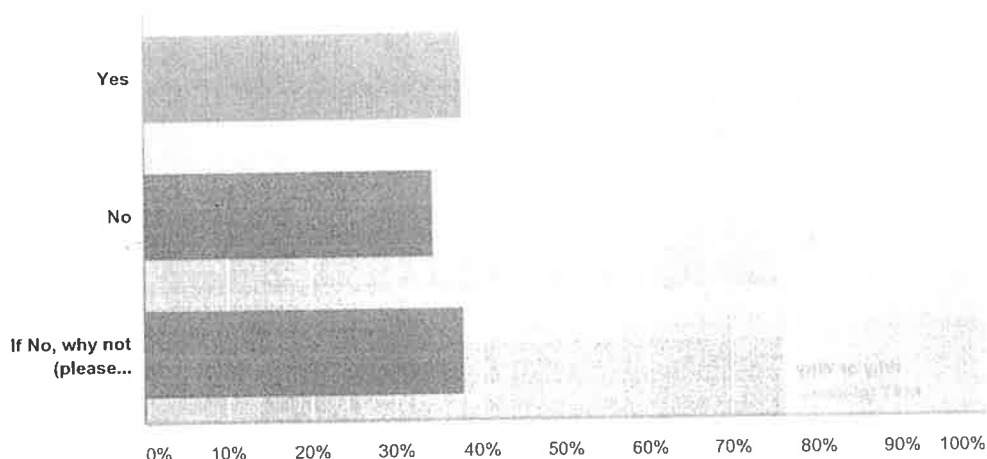


Answer Choices	Responses	
0	31.03%	9
1	6.90%	2
2	13.79%	4
3	0.00%	0
4	6.90%	2
5	13.79%	4
Do not know	27.59%	8
Total		29

2017 Section Chair Survey on Conventions

Q6 Has your section/group been regularly represented on the Summer Convention Committee?

Answered: 29 Skipped: 0



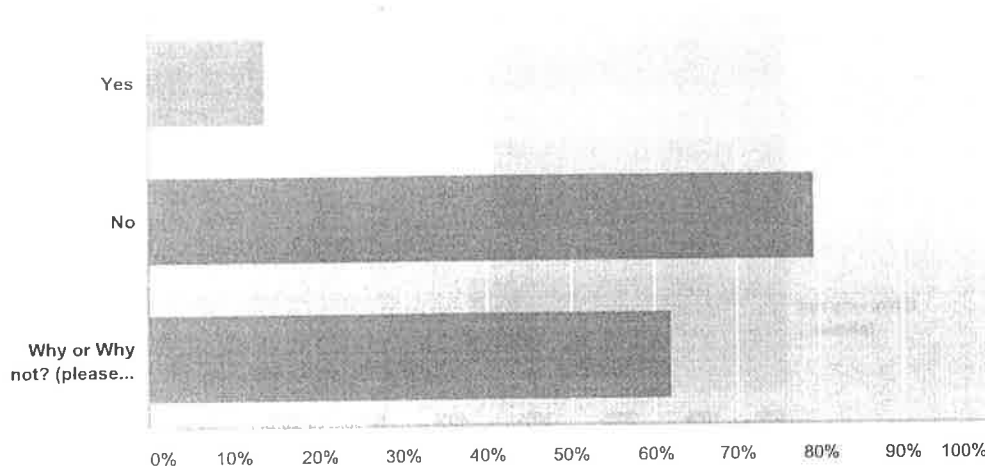
Answer Choices	Responses
Yes	37.93% 11
No	34.48% 10
If No, why not (please specify)	37.93% 11
Total Respondents: 29	

#	If No, why not (please specify)	Date
1	With annual turnover, sometimes current ENREL leadership is not contacted. Also, the summer convention often conflicts with the annual RMMLF conference.	1/24/2017 11:00 AM
2	Because we are the new kids in town.	1/23/2017 2:56 PM
3	Don't know	1/23/2017 11:09 AM
4	Not really applicable because of how large we are as the SL County Bar.	1/20/2017 2:13 PM
5	I'm guessing, as the federal bar association, we never really thought about participating. We plan a number of our own multi-day events as well.	1/19/2017 2:52 PM
6	We sponsor the judge's reception, but it doesn't seem to have any benefit for our members	1/19/2017 1:23 PM
7	Small section	1/19/2017 12:46 PM
8	CUBA considers its role to be very simple - monthly CLEs for Utah County attorneys. We do not think the Summer Convention germane to our purpose.	1/19/2017 8:59 AM
9	The section has only been sporadically active.	1/17/2017 11:36 AM
10	Not sure	1/16/2017 2:12 PM
11	Section just formed.	1/13/2017 5:14 PM

2017 Section Chair Survey on Conventions

Q7 Would you as a Section/Group leader be interested in having your Section/Group hold a formal section/group meeting at the Summer Convention?

Answered: 29 Skipped: 0



Answer Choices	Responses
Yes	13.79% 4
No	79.31% 23
Why or Why not? (please specify)	62.07% 18
Total Respondents: 29	

#	Why or Why not? (please specify)	Date
1	The bankruptcy section is not big enough to merit it	1/27/2017 11:50 AM
2	may prove an inticement for section members to come to the convention; perhaps a social event with the meeting itself	1/25/2017 4:23 PM
3	Again the distance to travel and time away results in few members attending.	1/24/2017 5:38 PM
4	Small group and not enough attendance	1/24/2017 11:01 AM
5	We typically seek to participate in the Spring Convention as there are fewer conflicts with our membership.	1/24/2017 11:00 AM
6	I would have to check with the section members, but it may be too far to go and too expensive; especially when we could hold that meeting here in SLC.	1/23/2017 2:56 PM
7	Don't see a need	1/23/2017 10:00 AM
8	It may be a good way to gather members from other parts of the state that we don't see as often,	1/20/2017 4:23 PM
9	See response to number 6; I also have no idea what FBA member attendance is like at the Bar Convention	1/19/2017 2:52 PM
10	Maybe	1/19/2017 1:23 PM
11	See above. I'd be open to talking to you, however, if you'd like to discuss otherwise.	1/19/2017 8:59 AM
12	We meet in April already.	1/19/2017 8:57 AM
13	Until the section is more active it wouldn't be a good use of time.	1/17/2017 11:36 AM
14	I think the value of the summer convention is networking with those outside our practice areas.	1/17/2017 10:51 AM

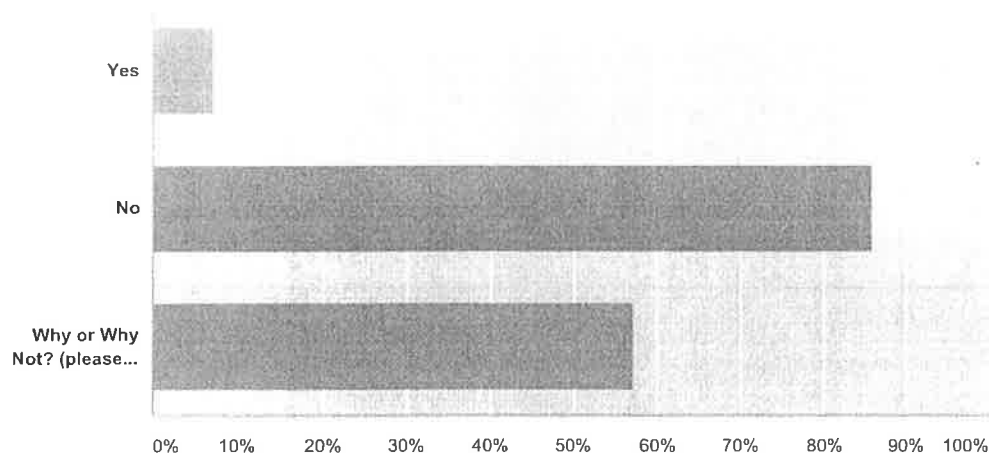
2017 Section Chair Survey on Conventions

15	Not sure enough members will be attending	1/17/2017 8:59 AM
16	Likely Not enough attendance	1/16/2017 2:12 PM
17	Summer convention is during the "break" for our section. In addition, please see the response to Question 3 which suggest a meeting at the summer convention would not draw enough participants.	1/16/2017 10:21 AM
18	I don't think enough of our members attend.	1/13/2017 5:14 PM

2017 Section Chair Survey on Conventions

Q8 Would you as a Section/Group leader be interested in your Section/Group holding its annual organizational meeting at the Summer Convention?

Answered: 28 Skipped: 1



Answer Choices	Responses
Yes	7.14% 2
No	85.71% 24
Why or Why Not? (please specify)	57.14% 16
Total Respondents: 28	

#	Why or Why Not? (please specify)	Date
1	Not enough people there to make it work	1/27/2017 11:50 AM
2	more participants at a regular meeting	1/25/2017 4:23 PM
3	We are a small group not located close to the convention.	1/24/2017 3:01 PM
4	See above	1/24/2017 11:01 AM
5	Our annual business meeting and, consequently, leadership transition occurs in October. Further, many ENREL members are at the RMMLF meeting during the summer convention.	1/24/2017 11:00 AM
6	same	1/23/2017 2:56 PM
7	We hold the IP Summit in February and holding a second meeting at the Summer Convention would (a) not be useful, (b) could detract from the Summit and (c) would likely not be well attended.	1/23/2017 11:09 AM
8	Probably not; we get more of our Executive Committee in local, regular meetings than at a remote convention.	1/20/2017 4:23 PM
9	Not if it is out of state. That would limit the number of people who would attend.	1/20/2017 12:17 PM
10	See answers to 6-7	1/19/2017 2:52 PM
11	See above, but I'm happy to talk to Rob about this.	1/19/2017 8:59 AM
12	We meet in April. Concerned attendance would be less at convention.	1/19/2017 8:57 AM
13	Low attendance.	1/17/2017 11:36 AM

2017 Section Chair Survey on Conventions

14	Not enough attendance, difficult enough to get to annual meeting in town	1/16/2017 2:12 PM
15	I'm not confident we'd get a strong turn-out	1/13/2017 5:36 PM
16	I don't think enough of our members attend.	1/13/2017 5:14 PM

2017 Section Chair Survey on Conventions

**Q9 Please identify any way your
Section/Group could better benefit from the
Summer Convention:**

Answered: 17 Skipped: 12

#	Responses	Date
1	I think it is good for our section	1/27/2017 11:50 AM
2	get to know other members of the Bar beyond our specific section	1/25/2017 4:23 PM
3	As we are generally located in St. George, the Summer Convention is difficult to attend due to the distance required to travel.	1/24/2017 5:38 PM
4	When our section has presented in the past, we have been slotted for the last session where many attendees, including section members, are no longer participating. A different time slot could attract better attendance from ENREL membership.	1/24/2017 11:00 AM
5	Not sure	1/23/2017 11:09 AM
6	Promoting benefits of joining the Section. Recognition of the Section for its sponsorship of breakout sessions and speakers.	1/20/2017 4:23 PM
7	Many members attend but we don't separately participate as the SL County Bar	1/20/2017 2:13 PM
8	I think holding it in state would be better and would draw a larger group of attorneys.	1/20/2017 12:17 PM
9	I'm not sure we can; we put on a lot of programming during the course of the year, which includes the 2-day Southern Utah Law Symposium in May and the Tri-State Seminar in September/October that rotates between Jackson Hole, Sun Valley, and Park City.	1/19/2017 2:52 PM
10	CLE topics of greatest interest to my section are family and criminal law (defense) topics.	1/19/2017 8:59 AM
11	We will have a breakout session this year for the first time since 2010. If we can do that each summer, I think we can start to get more of a draw.	1/17/2017 11:36 AM
12	Perhaps having some type of social event for the various groups.	1/17/2017 10:51 AM
13	Hold it somewhere close enough (Park City?) so that people could afford to attend	1/17/2017 8:59 AM
14	More affordable more/better general cle	1/16/2017 2:12 PM
15	More targeted CLE	1/16/2017 10:21 AM
16	I think the Conventions are great. I just don't think its a Section / Group event.	1/13/2017 5:36 PM
17	We recently formed so I don't have a good baseline.	1/13/2017 5:14 PM

2017 Section Chair Survey on Conventions

**Q10 Please identify any way your
section/group could better contribute to the
Summer Convention:**

Answered: 10 Skipped: 19

#	Responses	Date
1	Our section has restarted and we have tried to have a session each year, but with fewer bankruptcy needs, we don't want to do a lot at the meeting.	1/27/2017 11:50 AM
2	Perhaps taking an additional break out session, depending on the need	1/25/2017 4:23 PM
3	There are certain committees within ENREL that are not as active in RMMLF. If an ENREL representative were more regularly part of the planning committee, we could attempt to focus on these areas in planning speakers, etc.	1/24/2017 11:00 AM
4	We could provide more presentations, but the truth is that most people who attend the summer convention are not that interested in IP.	1/23/2017 11:09 AM
5	The Litigation Section contributes more than any other, I understand, up to a third of the content. We could host socials or a larger meeting, however.	1/20/2017 4:23 PM
6	See above	1/19/2017 2:52 PM
7	Antitrust is complimentary to many practice areas. I think we could combine with other sections for useful breakout sessions.	1/17/2017 11:36 AM
8	?	1/16/2017 2:12 PM
9	We could sponsor speakers.	1/13/2017 5:36 PM
10	We should present a solid breakout session.	1/13/2017 5:14 PM

2017 Section Chair Survey on Conventions

Q11 Please provide any other input that you think would be helpful in relation to your Section/Group:

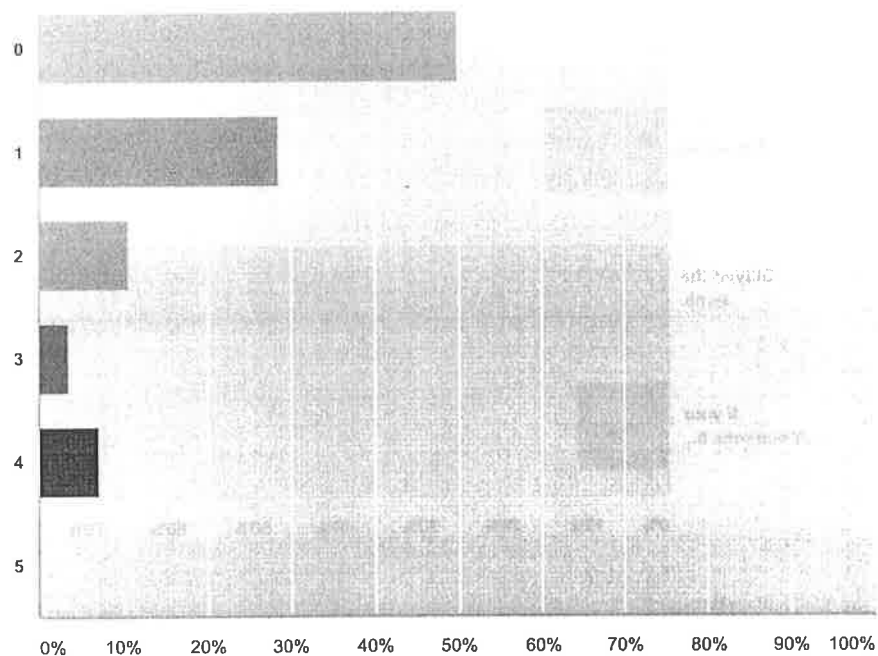
Answered: 4 Skipped: 25

#	Responses	Date
1	Franchising is a specialized practice but those who do franchise work also do work in other areas (litigation, general business or commercial work, etc.). The convention may be beneficial for these areas but the national conferences for franchising are important to attend because of the focus on the specialized area of law.	1/24/2017 11:01 AM
2	See above; question 5 is not letting me select 0	1/19/2017 2:52 PM
3	I think it would be nice if the presenters stayed for the remainder of the meeting. I don't know how to accomplish that as we even have difficulty with that at our section meetings.	1/17/2017 10:51 AM
4	When asked about conference attendance, members routinely mention the following reasons for not attending: expense, desire to use vacation days else where, and if they are going to attend a conference for credit they will choose a conference on a specific area of law. These responses come from a variety of members spanning big law to solo.	1/16/2017 10:21 AM

2017 Section Chair Survey on Conventions

Q12 Please indicate the number of Summer Conventions you have attended personally in the last 5 years?

Answered: 28 Skipped: 1

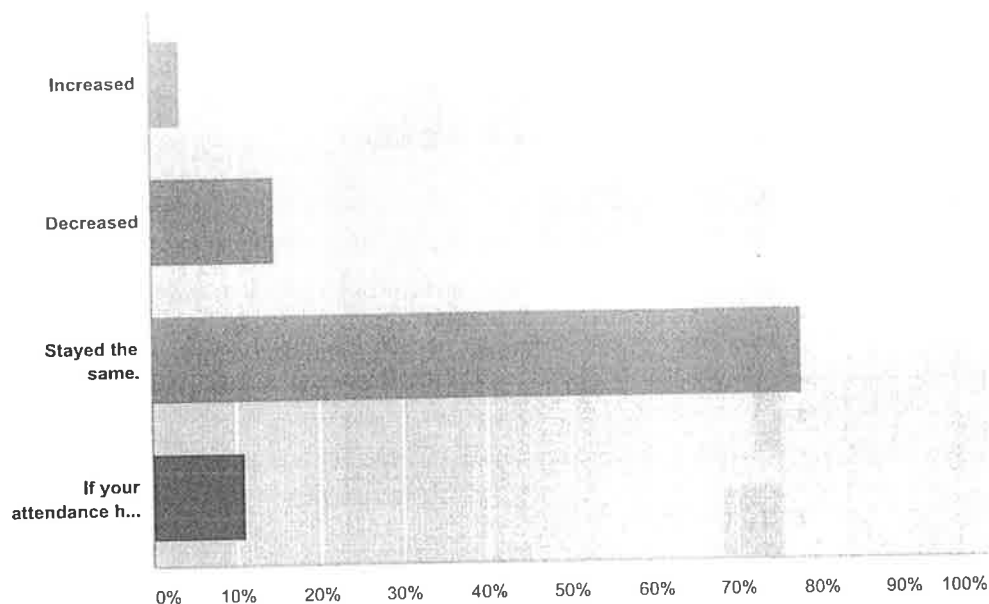


Answer Choices	Responses	
0	50.00%	14
1	28.57%	8
2	10.71%	3
3	3.57%	1
4	7.14%	2
5	0.00%	0
Total Respondents: 28		

2017 Section Chair Survey on Conventions

Q13 Over the past 10 years, has your attendance at Summer Conventions:

Answered: 27 Skipped: 2



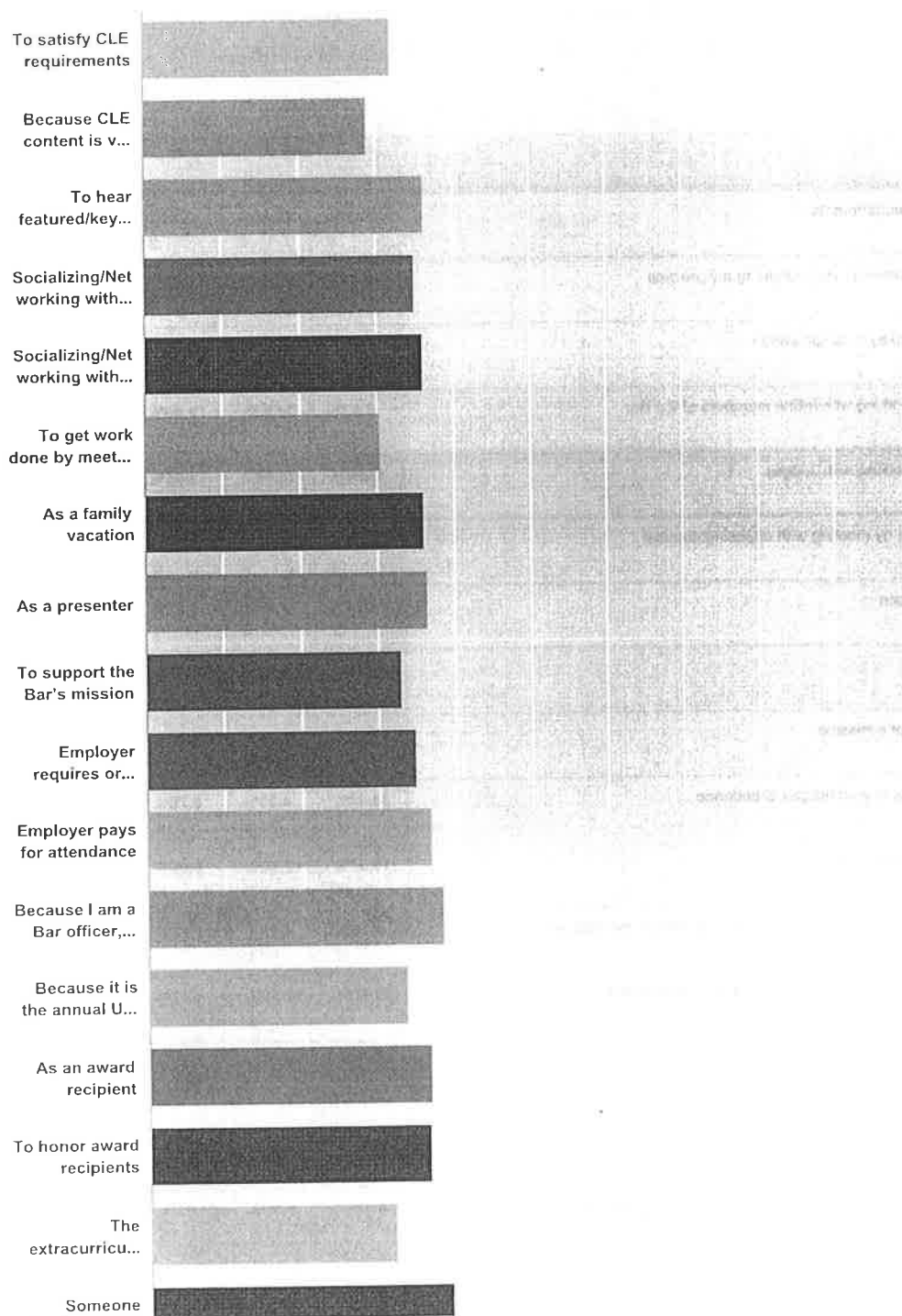
Answer Choices	Responses	
Increased	3.70%	1
Decreased	14.81%	4
Stayed the same.	77.78%	21
If your attendance has decreased, Please tell us why:	11.11%	3
Total Respondents: 27		

#	If your attendance has decreased, Please tell us why:	Date
1	I attended in maybe 2007 or 08 and it was a long drive, my firm was stingy on reimbursement, and for the amount of time I was up there, I didn't get very much CLE. It also felt like an old boy's network to which I didn't belong.	1/19/2017 2:56 PM
2	Cost, not enough time to go	1/16/2017 2:27 PM
3	Wanted to use vacation days elsewhere, did not want to spend the money, needed to work, was not intrigued by the key note speakers.	1/16/2017 10:27 AM

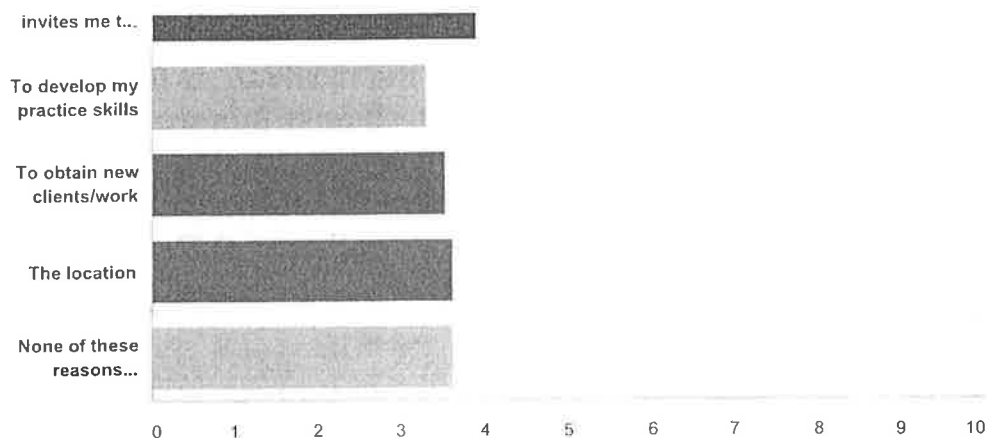
2017 Section Chair Survey on Conventions

Q14 Please rank all of the motivators for you personally attending past Summer Conventions on a scale of 1-4 (1 being the lowest motivators, but still a motivation, and 4 being the highest motivators): Rank all of those that apply to you personally.

Answered: 28 Skipped: 1



2017 Section Chair Survey on Conventions



	1	2	3	4	N/A	Total	Weighted Average
To satisfy CLE requirements	25.00% 6	12.50% 3	8.33% 2	25.00% 6	29.17% 7	24	3.21
Because CLE content is very helpful to my practice	26.09% 6	26.09% 6	8.70% 2	8.70% 2	30.43% 7	23	2.91
To hear featured/key note speakers	16.67% 4	8.33% 2	12.50% 3	20.83% 5	41.67% 10	24	3.63
Socializing/Networking with fellow members of the Bar	8.33% 2	20.83% 5	12.50% 3	29.17% 7	29.17% 7	24	3.50
Socializing/Networking with Judges	13.04% 3	13.04% 3	13.04% 3	21.74% 5	39.13% 9	23	3.61
To get work done by meeting with opposing counsel	39.13% 9	13.04% 3	0.00% 0	0.00% 0	47.83% 11	23	3.04
As a family vacation	13.04% 3	17.39% 4	4.35% 1	26.09% 6	39.13% 9	23	3.61
As a presenter	17.39% 4	4.35% 1	17.39% 4	17.39% 4	43.48% 10	23	3.65
To support the Bar's mission	17.39% 4	13.04% 3	30.43% 7	0.00% 0	39.13% 9	23	3.30
Employer requires or encourages attendance	30.43% 7	4.35% 1	8.70% 2	0.00% 0	56.52% 13	23	3.48
Employer pays for attendance	16.67% 4	12.50% 3	0.00% 0	29.17% 7	41.67% 10	24	3.67
Because I am a Bar officer, section leader, committee member, etc.	8.70% 2	4.35% 1	21.74% 5	26.09% 6	39.13% 9	23	3.83
Because it is the annual Utah State Bar business meeting	29.17% 7	12.50% 3	4.17% 1	4.17% 1	50.00% 12	24	3.33
As an award recipient	30.43% 7	4.35% 1	0.00% 0	0.00% 0	65.22% 15	23	3.65
To honor award recipients	22.73% 5	9.09% 2	9.09% 2	0.00% 0	59.09% 13	22	3.64
The extracurricular activities (bike riding, restaurants, golf, fishing, hiking, etc.)	30.43% 7	4.35% 1	21.74% 5	4.35% 1	39.13% 9	23	3.17

2017 Section Chair Survey on Conventions

Someone invites me to go along	8.70% 2	17.39% 4	8.70% 2	4.35% 1	60.87% 14	23	3,91
To develop my practice skills	14.29% 3	28.57% 6	14.29% 3	0.00% 0	42.86% 9	21	3,29
To obtain new clients/work	17.39% 4	21.74% 5	0.00% 0	13.04% 3	47.83% 11	23	3,52
The location	21.74% 5	0.00% 0	13.04% 3	26.09% 6	39.13% 9	23	3,61
None of these reasons motivate me to attend because I do not attend, and do not intend to attend	23.08% 3	15.38% 2	0.00% 0	0.00% 0	61.54% 8	13	3,62

2017 Section Chair Survey on Conventions

Q15 If you have not attended a Summer Convention in the last 5 years, please explain why not:

Answered: 13 Skipped: 16

#	Responses	Date
1	I'm just busy	1/27/2017 11:58 AM
2	I cannot afford to attend one and my work does not pay for it. Additionally, the CLEs offered are not applicable to my practice as thought the family law section members in general have broad general practices, I do not.	1/26/2017 9:27 AM
3	The travel distance to Sun Valley is difficult from St. George.	1/24/2017 5:43 PM
4	I am relatively new to the bar and unaware	1/24/2017 3:04 PM
5	The convention typically conflicts with more area-specific conferences applicable to my practice.	1/24/2017 11:06 AM
6	Limited CLE budget, time and national franchise conventions are necessary for a franchise practice.	1/24/2017 11:05 AM
7	Cost and time away!	1/23/2017 3:06 PM
8	Content not relevant to my practice	1/23/2017 11:11 AM
9	I have been unavailable to attend due to military commitments	1/23/2017 10:06 AM
10	Time out of office	1/20/2017 1:32 PM
11	See response to number 13	1/19/2017 2:56 PM
12	I attended previous to five year ago, but I've had conflicts on each date in the last five years.	1/13/2017 5:40 PM
13	I have only been a member of the Utah Bar for 3.5 years, and I obtain my CLE credits from our national trade groups annual law conference.	1/13/2017 5:18 PM

2017 Section Chair Survey on Conventions

Q16 If you have only attended a Summer Convention once or twice in the last 5 years, please explain why you did not attend more often:

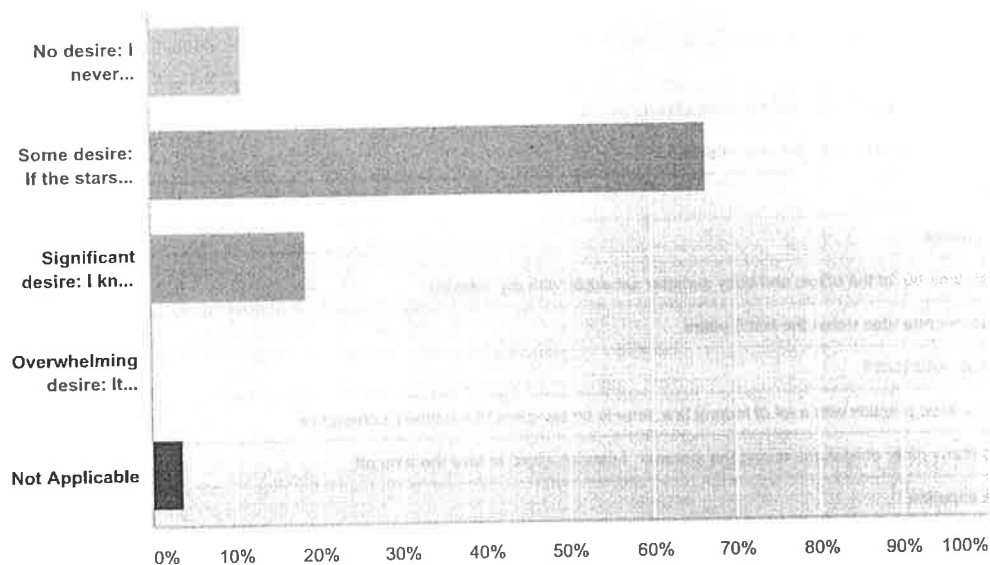
Answered: 17 Skipped: 12

#	Responses	Date
1	N/A	1/26/2017 9:27 AM
2	conflicts in schedule with other personal, family events	1/25/2017 4:27 PM
3	I am relatively new to the bar and unaware	1/24/2017 3:04 PM
4	N/A	1/24/2017 11:06 AM
5	See above	1/23/2017 10:06 AM
6	Cost, time out of the office, and busy summer schedule with my children.	1/20/2017 12:21 PM
7	Have not attended within the last 5 years	1/19/2017 2:56 PM
8	I could not afford it	1/19/2017 1:25 PM
9	Specialized practice with a lot of federal law, time is better spent at a national conference	1/19/2017 12:51 PM
10	Too many other obligations during the summer; I cannot afford to take the time off.	1/19/2017 9:03 AM
11	The expense.	1/19/2017 9:03 AM
12	Practice and family conflicts.	1/17/2017 11:40 AM
13	Cost, time and practicality of the value of spending that many days of non-billable hours to learn stuff only tangentially related to my practice.	1/17/2017 10:59 AM
14	Too expensive; sessions are largely irrelevant and useless	1/17/2017 9:03 AM
15	cost, too much work	1/16/2017 2:27 PM
16	Time away from work and nothing that interested me enough on the schedule to decide to take the time. Cost.	1/16/2017 10:27 AM
17	See, above.	1/13/2017 5:40 PM

2017 Section Chair Survey on Conventions

Q17 If you do not regularly attend Summer Conventions, (2 times or less in the last 5 years), how much desire do you currently have to attend Summer Conventions in the future?

Answered: 27 Skipped: 2



Answer Choices	Responses	
No desire: I never anticipate going	11.11%	3
Some desire: If the stars align, I might go	66.67%	18
Significant desire: I know I'm missing out if I don't go, so I typically plan on attending	18.52%	5
Overwhelming desire: It pains me whenever I miss a Summer Convention, so I will be there	0.00%	0
Not Applicable	3.70%	1
Total		27

2017 Section Chair Survey on Conventions

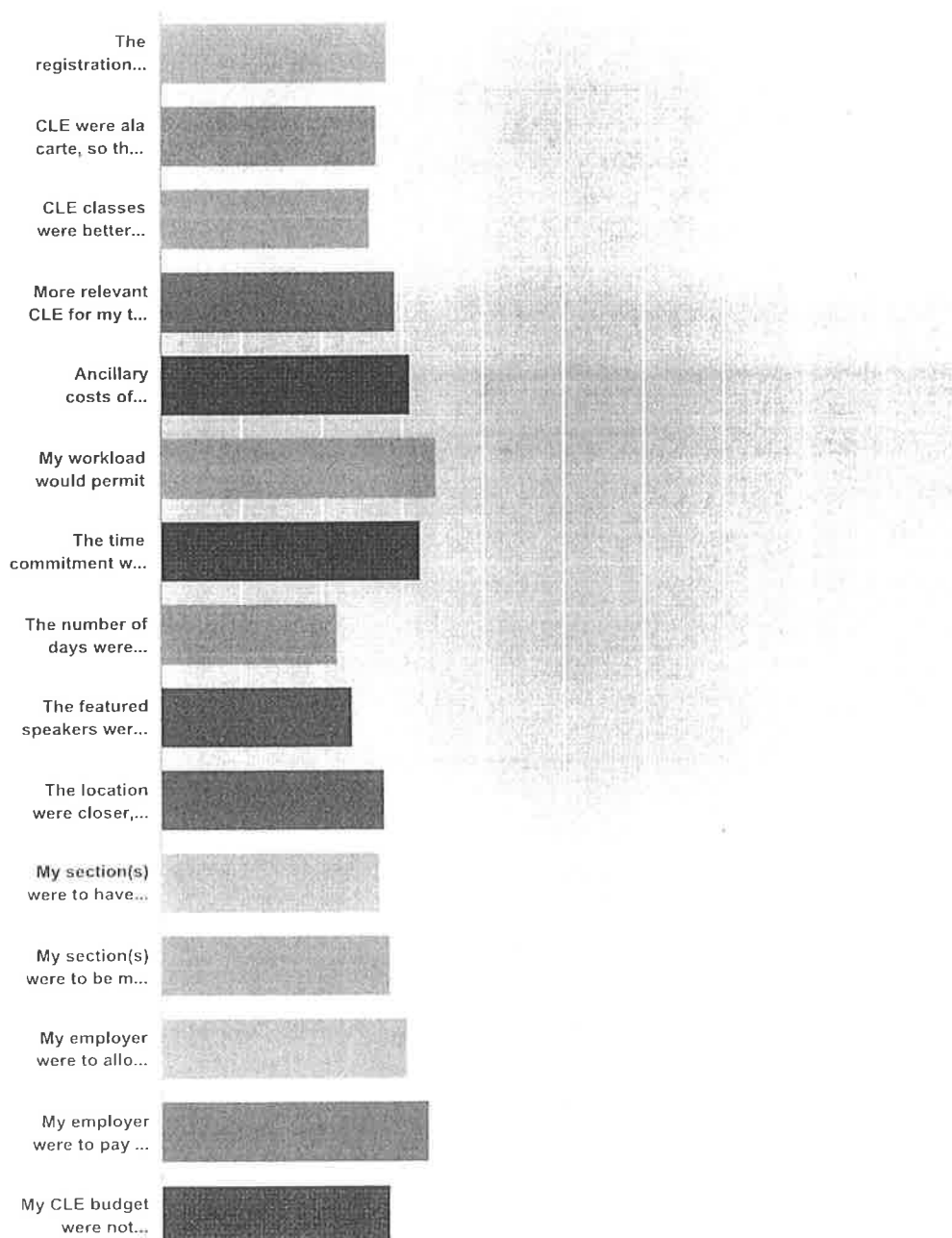
Q18 If you currently have “No desire” to attend more often, why is that?

Answered: 4 Skipped: 25

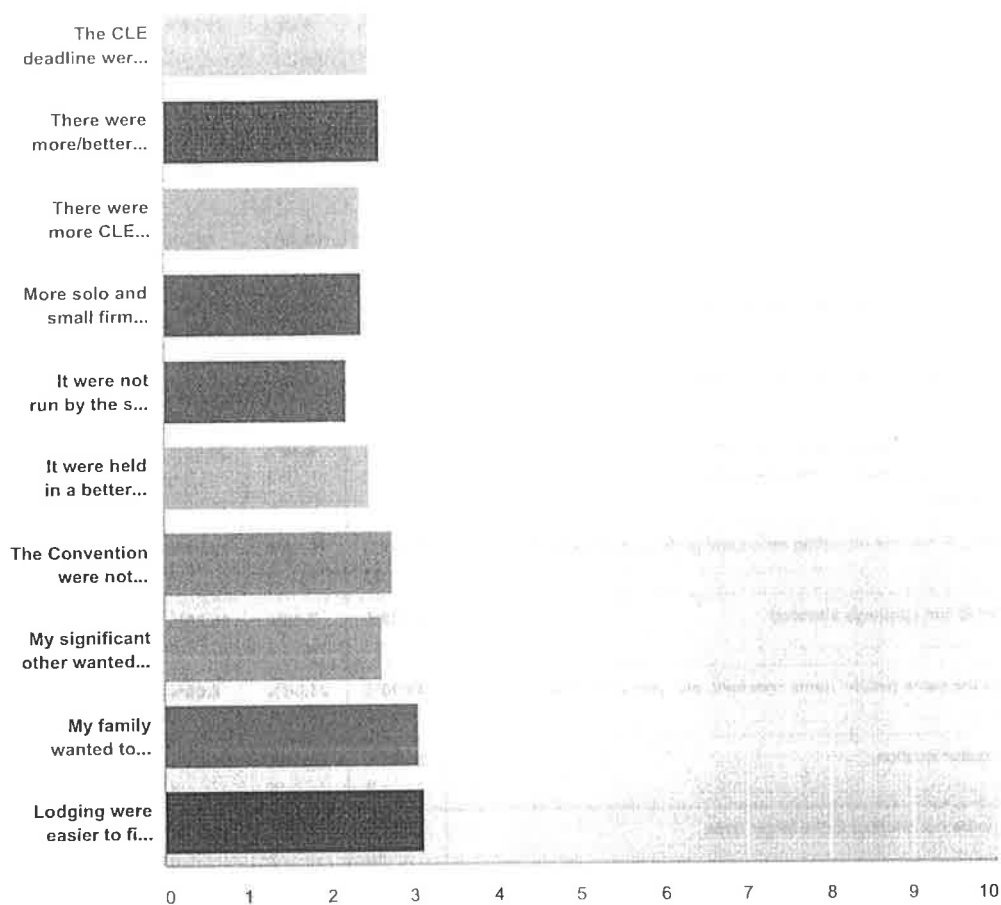
#	Responses	Date
1	Same as above.	1/26/2017 9:27 AM
2	See response to number 13	1/19/2017 2:56 PM
3	Specialized practice with a lot of federal law, time is better spent at a national conference.	1/19/2017 12:51 PM
4	Too far to travel, too much time commitment. Why is this not held in Salt Lake City?	1/13/2017 5:18 PM

Q19 Please rank the following reasons as to why you personally do not attend Summer Convention more often, which if changed would increase the likelihood that you would attend more often, on a scale of 1-4 (4 being the most likely to increase your attendance)(Rank all that would motivate you to attend more often – the rest mark as N/A).I would attend more often if:

Answered: 28 Skipped: 1



2017 Section Chair Survey on Conventions



	1	2	3	4	N/A	Total	Weighted Average
The registration fees were lower	25.93% 7	18.52% 5	18.52% 5	22.22% 6	14.81% 4	27	2.81
CLE were ala carte, so that I would only pay for the classes I actually attend	25.93% 7	25.93% 7	18.52% 5	11.11% 3	18.52% 5	27	2.70
CLE classes were better quality	34.62% 9	19.23% 5	15.38% 4	11.54% 3	19.23% 5	26	2.62
More relevant CLE for my type of practice were provided	18.52% 5	11.11% 3	37.04% 10	25.93% 7	7.41% 2	27	2.93
Ancillary costs of attending (accommodations, food, travel, etc.) were lower	14.81% 4	18.52% 5	18.52% 5	37.04% 10	11.11% 3	27	3.11
My workload would permit	3.85% 1	15.38% 4	19.23% 5	57.69% 15	3.85% 1	26	3.42
The time commitment were less (i.e., less time away from practice, family, etc.)	11.54% 3	19.23% 5	15.38% 4	42.31% 11	11.54% 3	26	3.23
The number of days were increased, (more CLE, activities, etc.) so as to make the time commitment more worth it	48.00% 12	24.00% 6	4.00% 1	8.00% 2	16.00% 4	25	2.20
The featured speakers were better	37.50% 9	25.00% 6	12.50% 3	12.50% 3	12.50% 3	24	2.38
The location were closer, so I would not lose so much time traveling	19.23% 5	23.08% 6	23.08% 6	30.77% 8	3.85% 1	26	2.77

2017 Section Chair Survey on Conventions

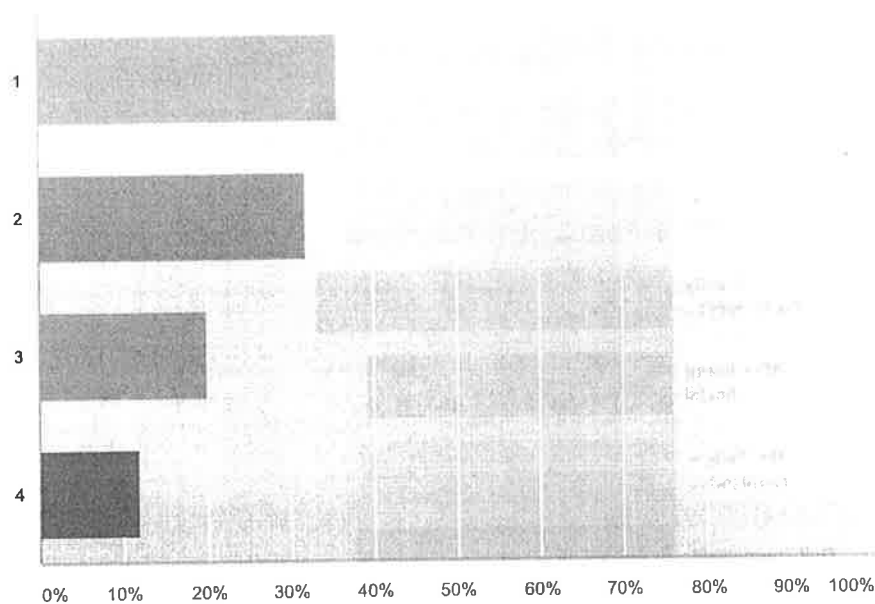
My section(s) were to have its/their annual meeting(s) there	40.00% 10	4.00% 1	20.00% 5	16.00% 4	20.00% 5	25	2.72
My section(s) were to be more involved in CLE or social activities	36.00% 9	0.00% 0	28.00% 7	16.00% 4	20.00% 5	25	2.84
My employer were to allow time to attend	36.00% 9	4.00% 1	8.00% 2	24.00% 6	28.00% 7	25	3.04
My employer were to pay for me to attend	20.00% 5	12.00% 3	8.00% 2	36.00% 9	24.00% 6	25	3.32
My CLE budget were not consumed by more specialized CLE	24.00% 6	16.00% 4	28.00% 7	16.00% 4	16.00% 4	25	2.84
The CLE deadline were after the Convention so that I could get the rest of the hours I	48.00% 12	8.00% 2	12.00% 3	12.00% 3	20.00% 5	25	2.48
There were more/better activities designed to assist me in making new contacts (i.e., there were more social activities designed specifically for attorneys not already well connected)	40.00% 10	8.00% 2	20.00% 5	16.00% 4	16.00% 4	25	2.60
There were more CLE courses regarding ethics and professionalism/civility	42.31% 11	15.38% 4	23.08% 6	3.85% 1	15.38% 4	26	2.35
More solo and small firm attorneys attended	50.00% 13	7.69% 2	15.38% 4	7.69% 2	19.23% 5	26	2.38
It were not run by the same people, same speakers, etc. year after year	48.00% 12	24.00% 6	8.00% 2	0.00% 0	20.00% 5	25	2.20
It were held in a better location	34.62% 9	23.08% 6	11.54% 3	23.08% 6	7.69% 2	26	2.46
The Convention were not oriented to the larger firms	37.04% 10	7.41% 2	18.52% 5	18.52% 5	18.52% 5	27	2.74
My significant other wanted to attend, or could attend (including getting time off)	36.00% 9	8.00% 2	28.00% 7	16.00% 4	12.00% 3	25	2.60
My family wanted to vacation at the location	20.00% 5	8.00% 2	28.00% 7	36.00% 9	8.00% 2	25	3.04
Lodging were easier to find, or cheaper	11.54% 3	23.08% 6	26.92% 7	19.23% 5	19.23% 5	26	3.12

#	Is there any other change that would motivate you to attend more often?	Date
1	Yes—having it in Utah!	1/23/2017 3:06 PM
2	If my Section paid for it.	1/19/2017 9:03 AM
3	Move it to Salt Lake.	1/13/2017 5:18 PM

2017 Section Chair Survey on Conventions

Q20 On a scale of 1-4 (4 being most important) how important are the ancillary activities organized by the Bar during the conventions?

Answered: 25 Skipped: 4

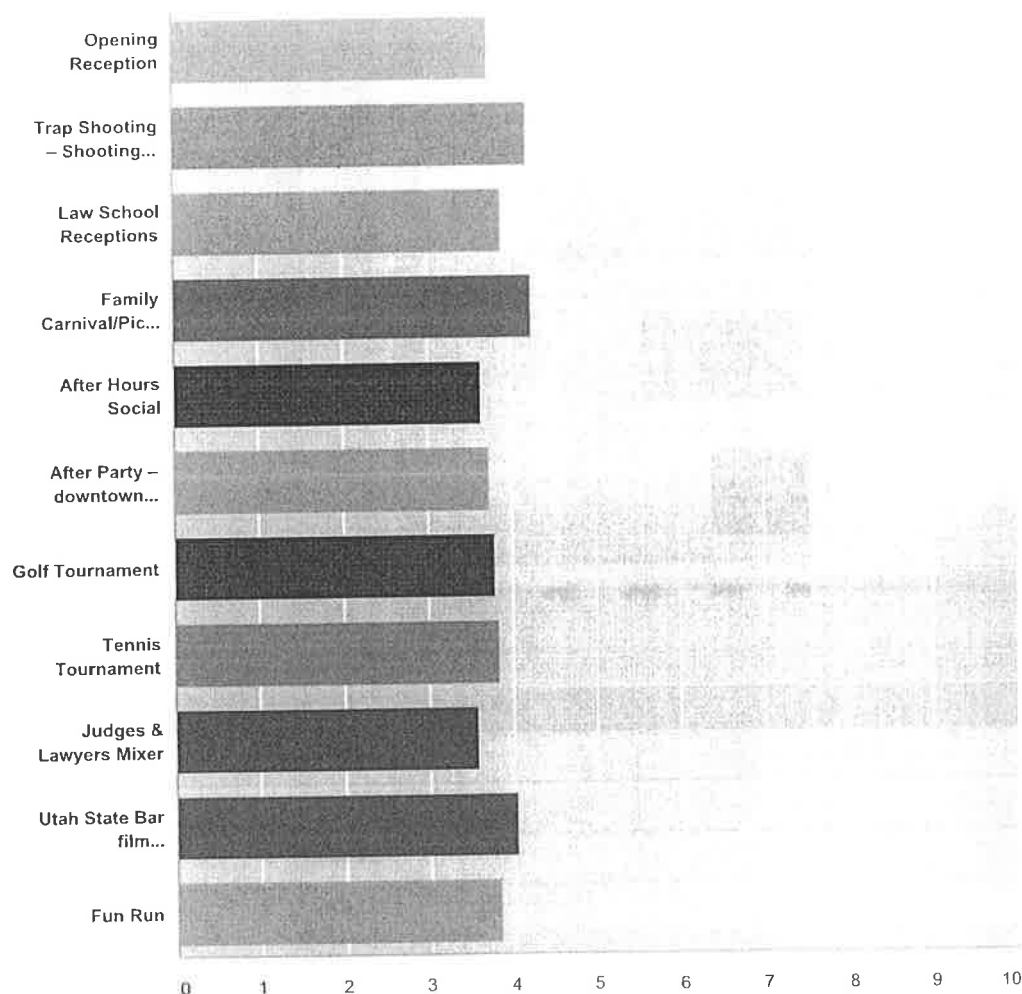


Answer Choices	Responses	
1	36.00%	9
2	32.00%	8
3	20.00%	5
4	12.00%	3
Total		25

2017 Section Chair Survey on Conventions

Q21 If you have attended a Summer Convention, please rank the following activities that you have participated in on a scale of 1-4 (4 being the highest benefit):

Answered: 21 Skipped: 3



	1	2	3	4	N/A	Total	Weighted Average
Opening Reception	10.00% 2	15.00% 3	10.00% 2	20.00% 4	45.00% 9	20	3.75
Trap Shooting – Shooting Instruction/Beginners Luck Shooting Tournament	15.79% 3	5.26% 1	0.00% 0	0.00% 0	78.95% 15	19	4.21
Law School Receptions	10.00% 2	10.00% 2	15.00% 3	10.00% 2	55.00% 11	20	3.90
Family Carnival/Picnic/Movie	5.26% 1	5.26% 1	15.79% 3	5.26% 1	68.42% 13	19	4.26
After Hours Social	15.00% 3	5.00% 1	25.00% 5	10.00% 2	45.00% 9	20	3.65

2017 Section Chair Survey on Conventions

After Party – downtown Ketchum	10.53% 2	21.05% 4	10.53% 2	0.00% 0	57.89% 11	19	3.74
Golf Tournament	15.79% 3	15.79% 3	5.26% 1	0.00% 0	63.16% 12	19	3.79
Tennis Tournament	21.05% 4	10.53% 2	0.00% 0	0.00% 0	68.42% 13	19	3.84
Judges & Lawyers Mixer	10.00% 2	15.00% 3	20.00% 4	15.00% 3	40.00% 8	20	3.60
Utah State Bar film presentation/panel discussion	10.53% 2	0.00% 0	21.05% 4	10.53% 2	57.89% 11	19	4.05
Fun Run	15.79% 3	10.53% 2	5.26% 1	10.53% 2	57.89% 11	19	3.84

#	If you have not participated in any of the forgoing activities, why not?	Date
1	I have not been to a Summer Convention	1/24/2017 11:07 AM
2	I have not attended a summer convention	1/23/2017 11:12 AM
3	Not regular participant in them at home.	1/20/2017 4:31 PM
4	Spend time with my family instead.	1/20/2017 12:22 PM
5	I frankly don't remember if I attended any of them	1/19/2017 2:57 PM
6	Travel time and family activities.	1/17/2017 11:41 AM

**Q22 Are there any ancillary activities/events
you wish occurred at the Summer
Convention which would cause you to be
more likely to attend?**

Answered: 6 Skipped: 23

#	Responses	Date
1	No	1/23/2017 11:12 AM
2	Coordinated socializing, team-building	1/20/2017 4:31 PM
3	Opportunities geared towards networking	1/20/2017 2:05 PM
4	No.	1/20/2017 12:22 PM
5	More outdoor activities	1/19/2017 2:57 PM
6	More activities to get to know judges If rule committees held their meetings there and we could attend	1/16/2017 2:30 PM

2017 Section Chair Survey on Conventions

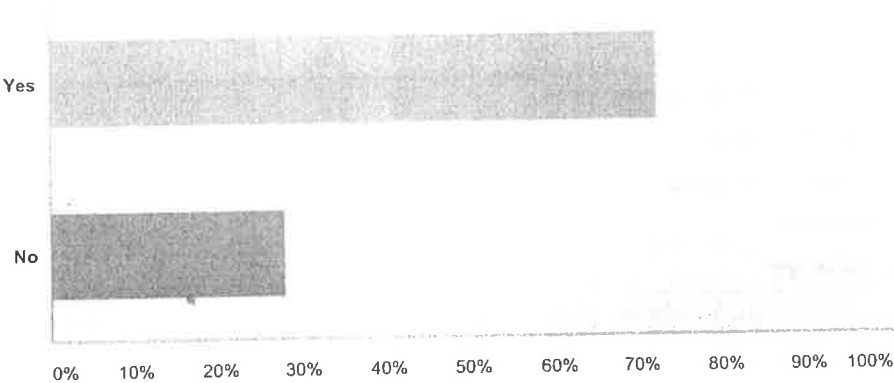
Q23 What extracurricular activities are the most important to you?

Answered: 6 Skipped: 23

#	Responses	Date
1	NO	1/23/2017 11:12 AM
2	Picnics and others that involve family.	1/20/2017 4:31 PM
3	Love the golf tournament!	1/20/2017 2:17 PM
4	Outdoor activities - hiking, etc.	1/19/2017 2:57 PM
5	Family activities	1/17/2017 11:00 AM
6	judge socials, golf	1/16/2017 2:30 PM

Q24 Do you have a significant other with whom you consult when deciding whether to attend the Summer Convention?

Answered: 25 Skipped: 4

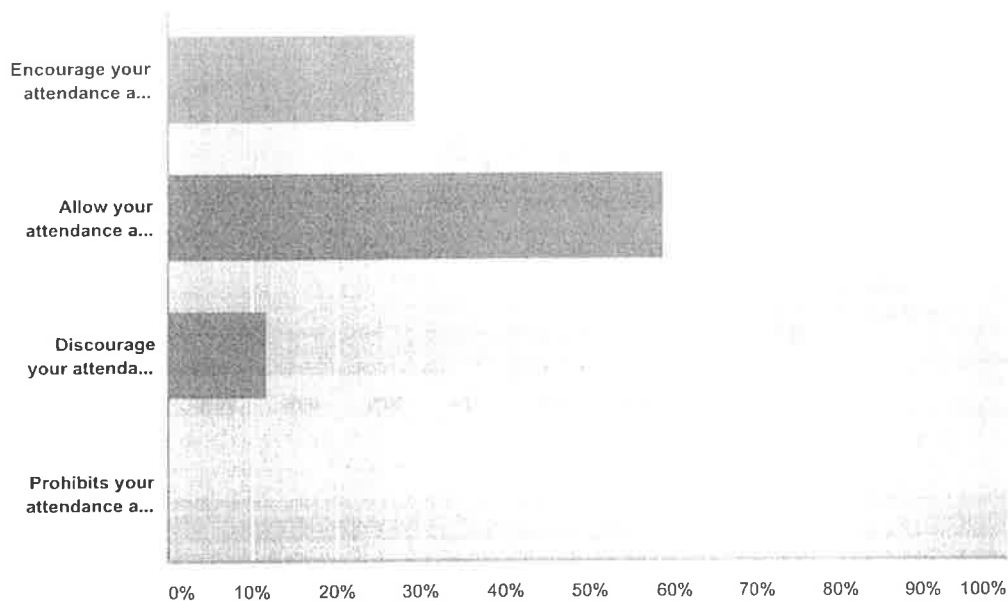


Answer Choices	Responses	
Yes	72.00%	18
No	28.00%	7
Total		25

2017 Section Chair Survey on Conventions

**Q25 If Yes, does your significant other:
(pick the answer which most closely
applies)**

Answered: 17 Skipped: 12

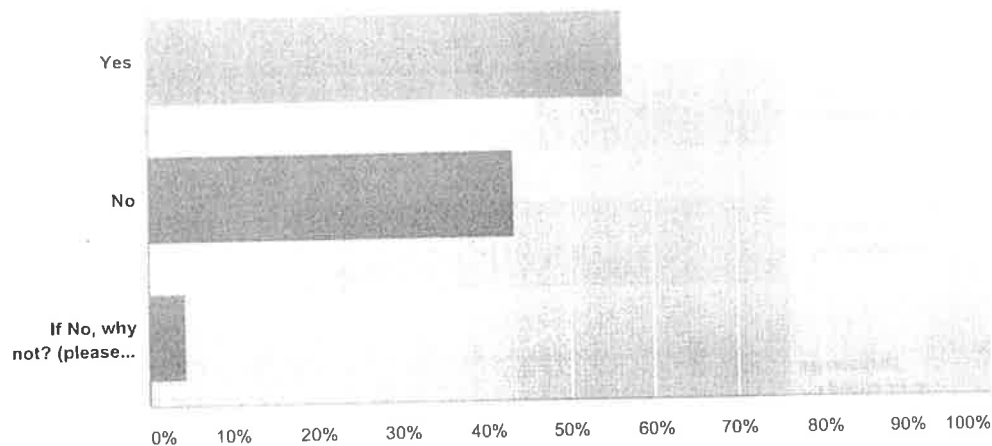


Answer Choices	Responses	
Encourage your attendance at the Summer Convention?	29.41%	5
Allow your attendance at the Summer Convention?	58.82%	10
Discourage your attendance at the Summer Convention?	11.76%	2
Prohibits your attendance at the Summer Convention?	0.00%	0
Total		17

2017 Section Chair Survey on Conventions

Q26 Have you ever taken your significant other with you to a Summer Convention?

Answered: 23 Skipped: 6



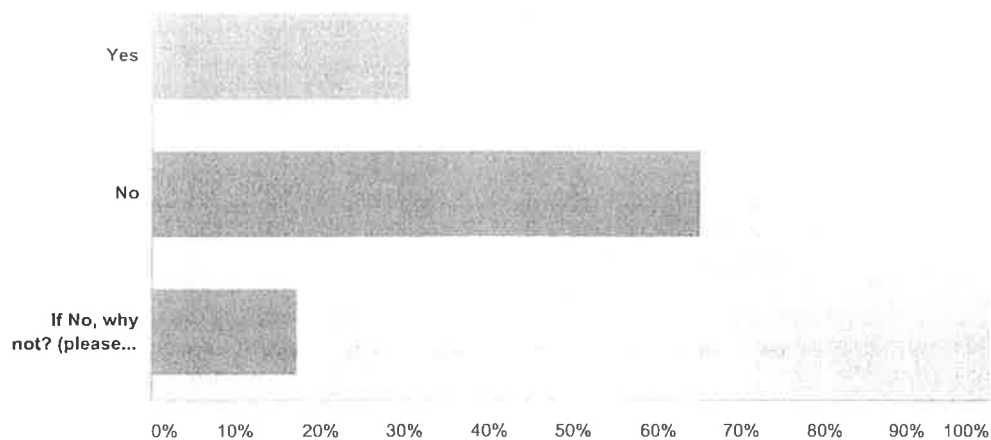
Answer Choices		Responses	
Yes		56.52%	13
No		43.48%	10
If No, why not? (please specify)		4.35%	1
Total Respondents: 23			

#	If No, why not? (please specify)	Date
1	I have never went	1/26/2017 9:29 AM

2017 Section Chair Survey on Conventions

Q27 Have you ever taken your significant other with you to the Spring Convention?

Answered: 23 Skipped: 6



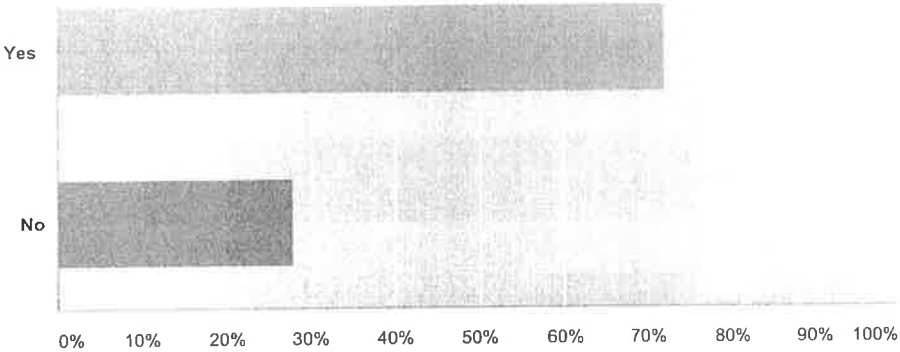
Answer Choices	Responses
Yes	30.43% 7
No	65.22% 15
If No, why not? (please specify)	17.39% 4
Total Respondents: 23	

#	If No, why not? (please specify)	Date
1	I have never went	1/26/2017 9:29 AM
2	I live in St. George.	1/24/2017 8:09 PM
3	I don't attend the Spring Convention	1/20/2017 2:18 PM
4	I have never been	1/19/2017 9:05 AM

2017 Section Chair Survey on Conventions

Q28 Do you have children living in your home?

Answered: 25 Skipped: 4

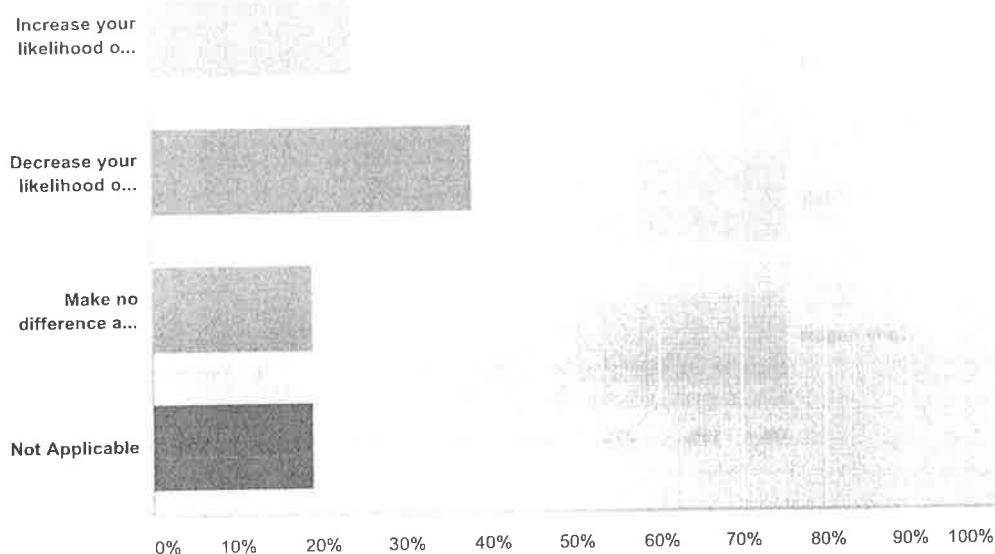


Answer Choices	Responses
Yes	72.00% 18
No	28.00% 7
Total	25

2017 Section Chair Survey on Conventions

Q29 If Yes, does/do your child(ren):

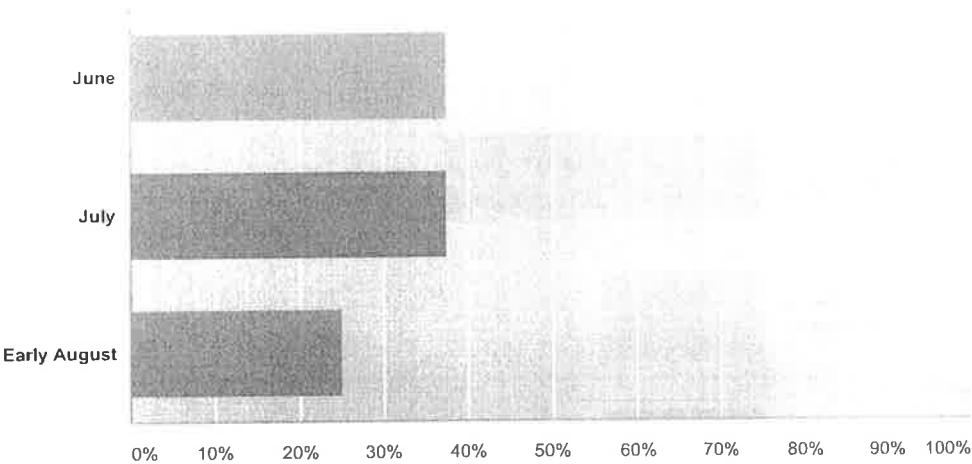
Answered: 21 Skipped: 8



Answer Choices	Responses	
Increase your likelihood of attending Summer Convention?	23.81%	5
Decrease your likelihood of attending Summer Convention?	38.10%	8
Make no difference as to your likelihood of attending Summer Convention?	19.05%	4
Not Applicable	19.05%	4
Total		21

Q30 When would you prefer the Summer Convention be held?

Answered: 24 Skipped: 5

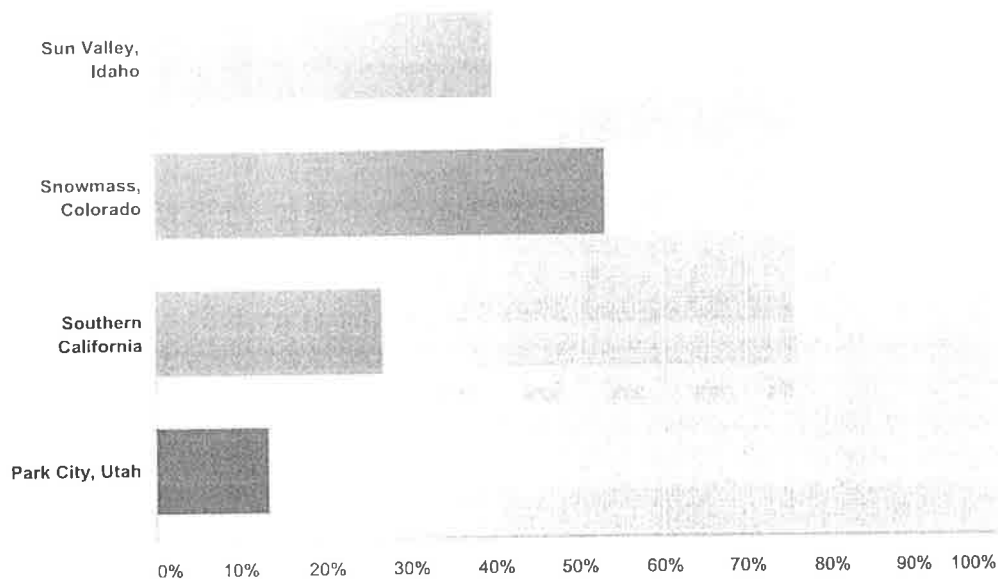


Answer Choices	Responses
June	37.50%9
July	37.50%9
Early August	25.00%6
Total	24

2017 Section Chair Survey on Conventions

Q31 Which of the following locations have you attended for a Summer Convention?

Answered: 15 Skipped: 14

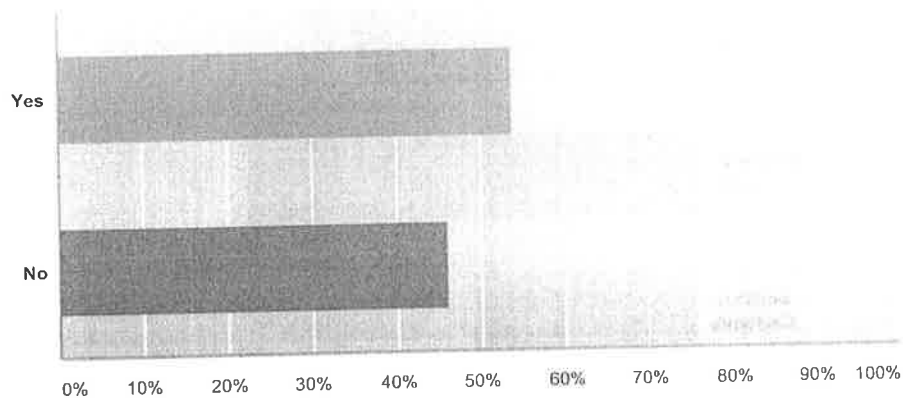


Answer Choices	Responses	
Sun Valley, Idaho	40.00%	6
Snowmass, Colorado	53.33%	8
Southern California	26.67%	4
Park City, Utah	13.33%	2
Total Respondents: 15		

2017 Section Chair Survey on Conventions

Q32 Have you attended a Spring Convention in St. George Utah in the last 5 years?

Answered: 26 Skipped: 3

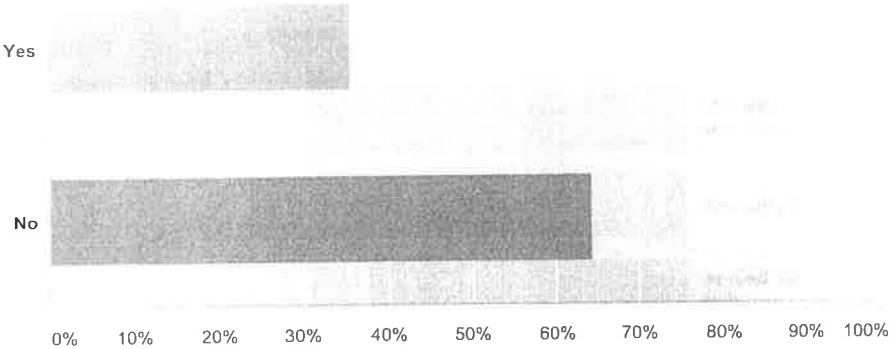


Answer Choices	Responses	
Yes	53.85%	14
No	46.15%	12
Total		26

2017 Section Chair Survey on Conventions

Q33 Have you attended a Fall Forum in Salt Lake City in the last 5 years?

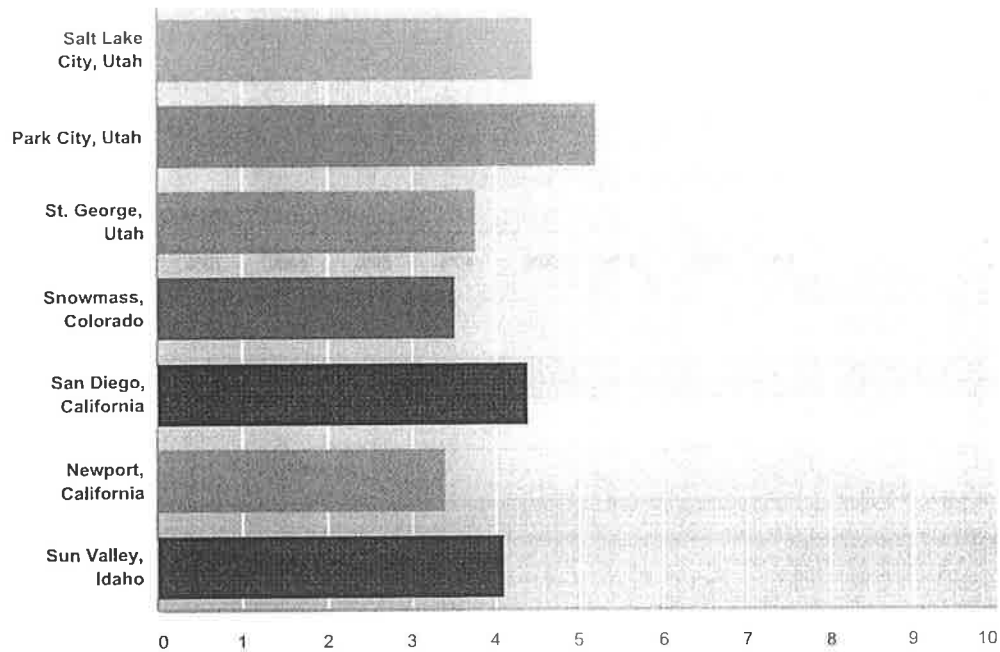
Answered: 28 Skipped: 1



Answer Choices	Responses	
Yes	35.71%	10
No	64.29%	18
Total		28

Q34 With 1 having greatest appeal as a convention location and 7 the least appealing, please rank each of the following past locations as to its appeal for a convention.

Answered: 28 Skipped: 1

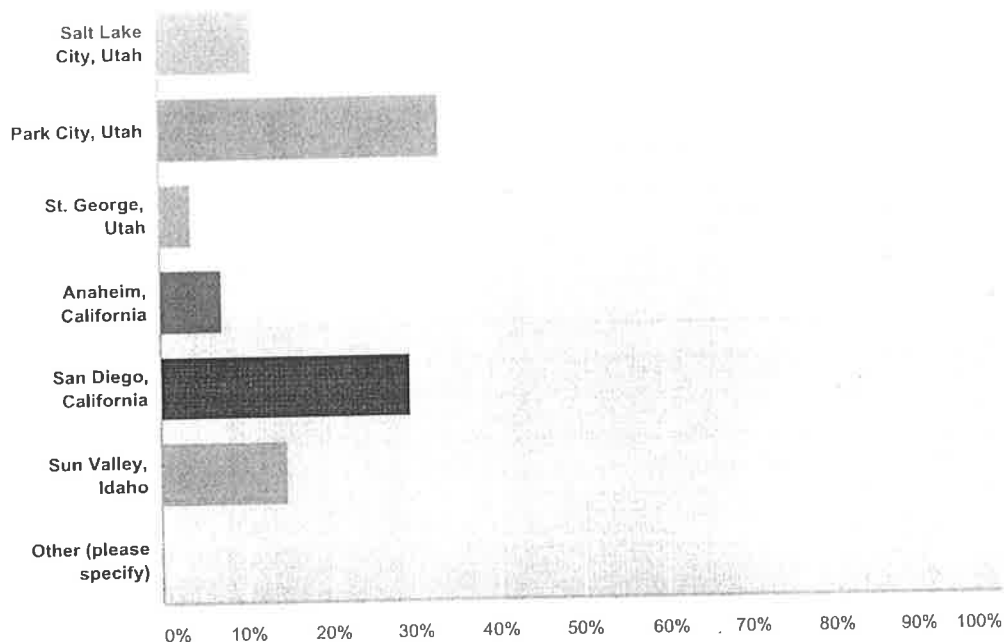


	1	2	3	4	5	6	7	Total	Score
Salt Lake City, Utah	19.23% 5	26.92% 7	15.38% 4	7.69% 2	0.00% 0	11.54% 3	19.23% 5	26	4.46
Park City, Utah	25.00% 6	29.17% 7	20.83% 5	4.17% 1	8.33% 2	12.50% 3	0.00% 0	24	5.21
St. George, Utah	13.04% 3	4.35% 1	26.09% 6	13.04% 3	13.04% 3	8.70% 2	21.74% 5	23	3.78
Snowmass, Colorado	4.00% 1	12.00% 3	12.00% 3	24.00% 6	12.00% 3	24.00% 6	12.00% 3	25	3.52
San Diego, California	28.00% 7	8.00% 2	8.00% 2	16.00% 4	24.00% 5	4.00% 1	12.00% 3	25	4.40
Newport, California	4.55% 1	13.64% 3	9.09% 2	13.64% 3	22.73% 5	22.73% 5	13.64% 3	22	3.41
Sun Valley, Idaho	16.00% 4	16.00% 4	8.00% 2	20.00% 5	16.00% 4	12.00% 3	12.00% 3	25	4.12

2017 Section Chair Survey on Conventions

Q35 Where would you personally prefer the Summer Convention be regularly located?

Answered: 27 Skipped: 2



Answer Choices	Responses	
Salt Lake City, Utah	11.11%	3
Park City, Utah	33.33%	9
St. George, Utah	3.70%	1
Anaheim, California	7.41%	2
San Diego, California	29.63%	8
Sun Valley, Idaho	14.81%	4
Other (please specify)	0.00%	0
Total		27

#	Other (please specify)	Date
	There are no responses.	

Q36 Rotated between the following locations at the following intervals:

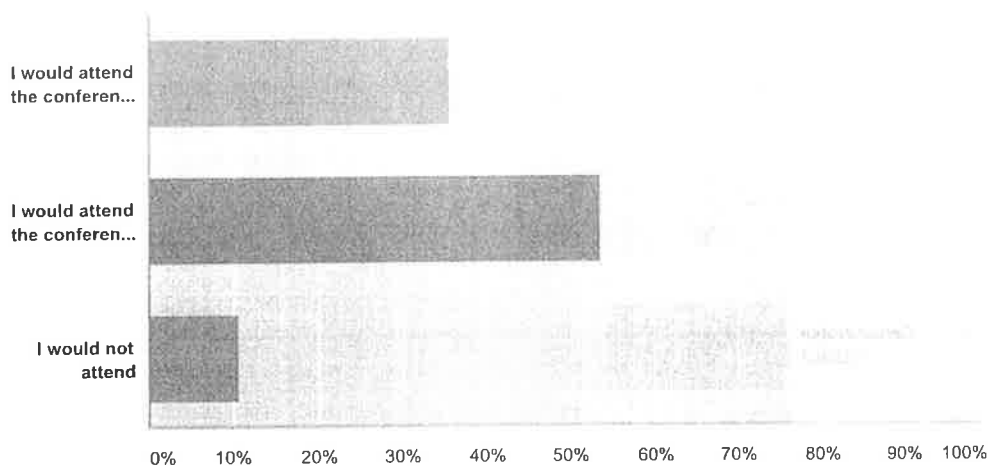
Answered: 6 Skipped: 23

#	Responses	Date
1	every 3-4 years	1/25/2017 4:31 PM
2	??	1/24/2017 11:12 AM
3	Park City, San Diego	1/20/2017 12:26 PM
4	Park City/Sun Valley every other year	1/17/2017 11:02 AM
5	Park City then Southern Cal	1/16/2017 2:34 PM
6	Park City	1/13/2017 5:20 PM

2017 Section Chair Survey on Conventions

Q37 If the Summer Convention were held in Park City, Utah, which of the following would likely apply to you?

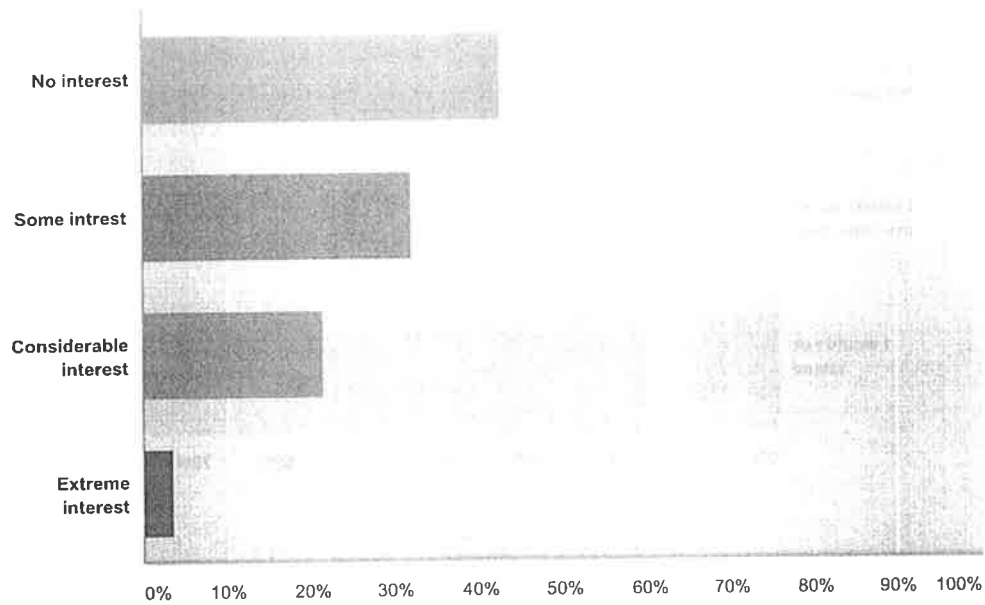
Answered: 28 Skipped: 1



Answer Choices	Responses	
I would attend the conference and stay in Park City overnight	35.71%	10
I would attend the conference but return home each evening	53.57%	15
I would not attend	10.71%	3
Total		28

Q38 On a scale of 1-4, how interested would you be in a CLE cruise sponsored by the Bar?

Answered: 28 Skipped: 1

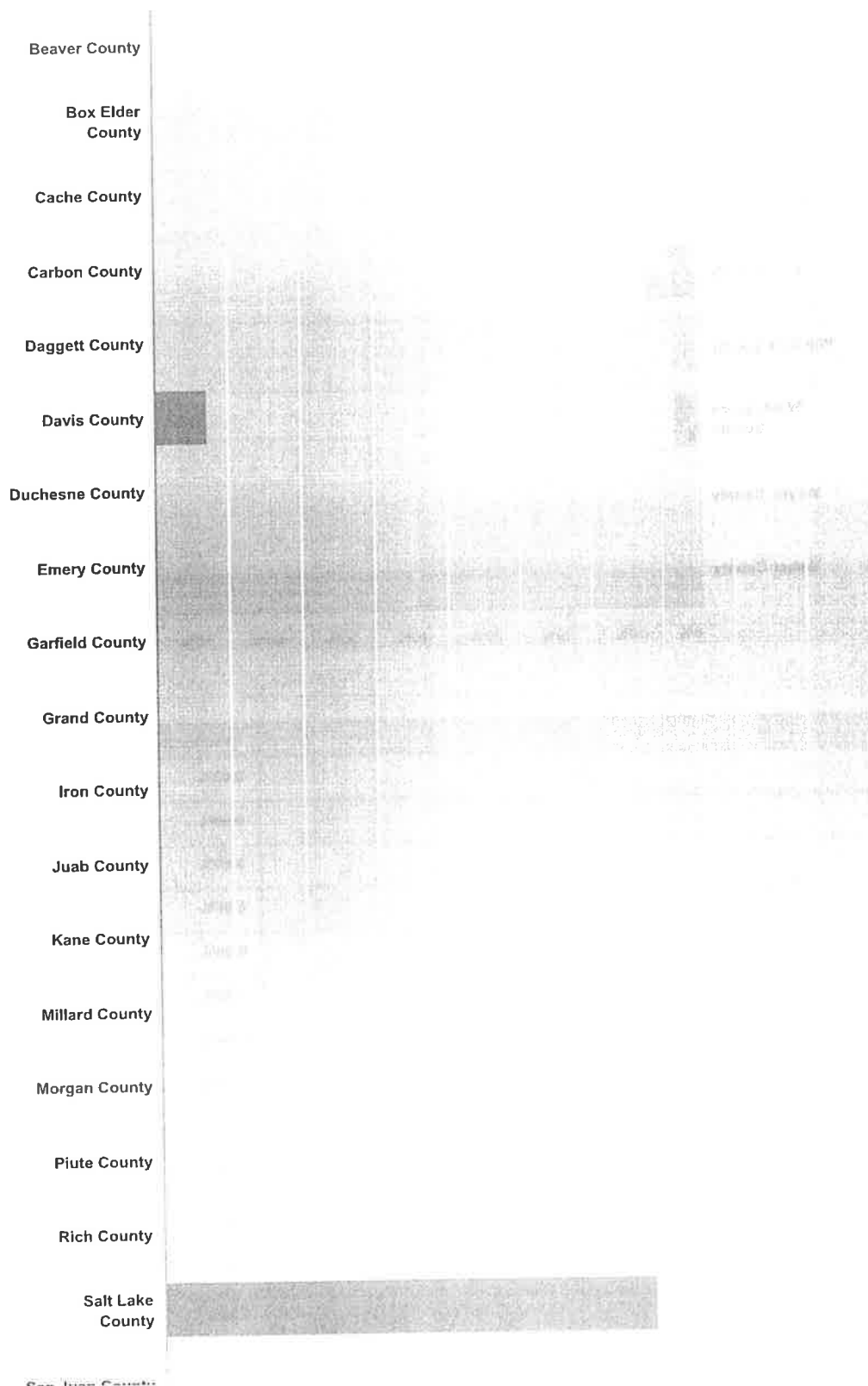


Answer Choices	Responses	
No interest	42.86%	12
Some interest	32.14%	9
Considerable interest	21.43%	6
Extreme interest	3.57%	1
Total		28

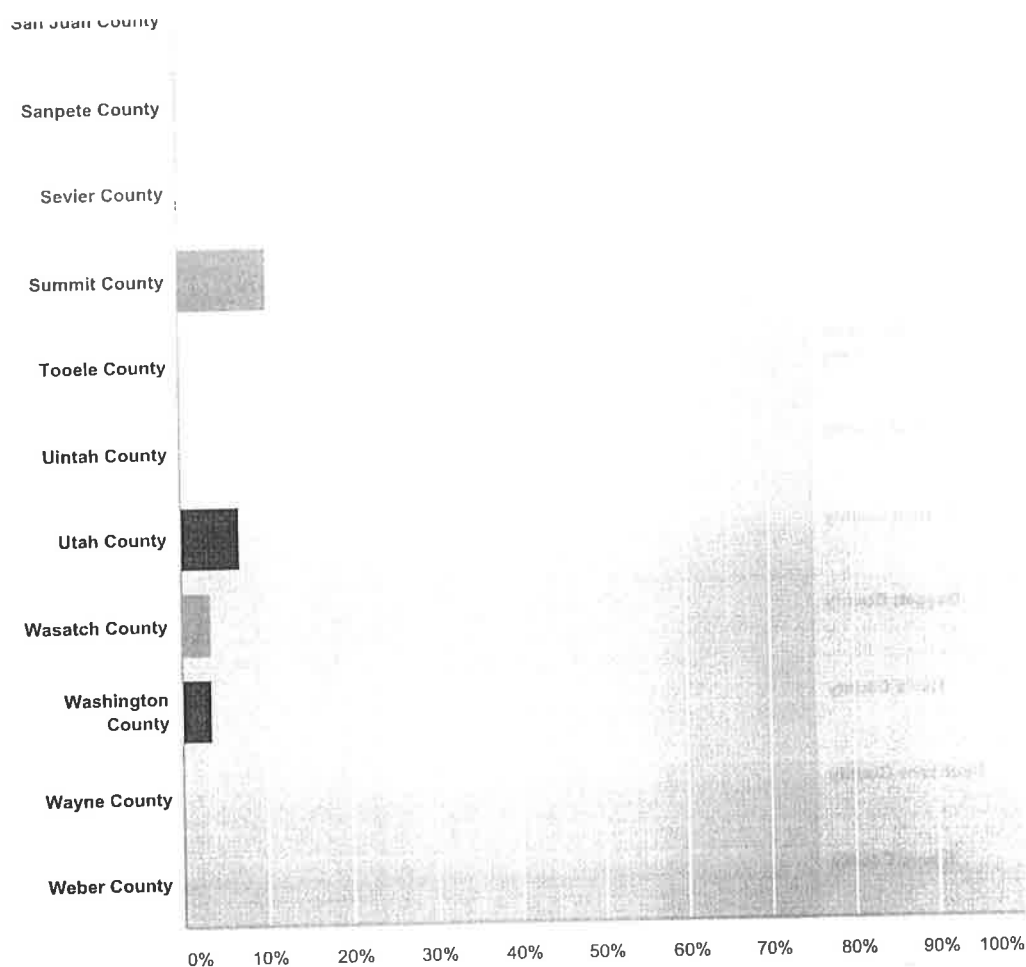
2017 Section Chair Survey on Conventions

Q39 In which county is your practice located?

Answered: 28 Skipped: 1



2017 Section Chair Survey on Conventions



Answer Choices	Responses
Beaver County	0.00% 0
Box Elder County	0.00% 0
Cache County	0.00% 0
Carbon County	0.00% 0
Daggett County	0.00% 0
Davis County	7.14% 2
Duchesne County	0.00% 0
Emery County	0.00% 0
Garfield County	0.00% 0
Grand County	0.00% 0
Iron County	0.00% 0
Juab County	0.00% 0
Kane County	0.00% 0

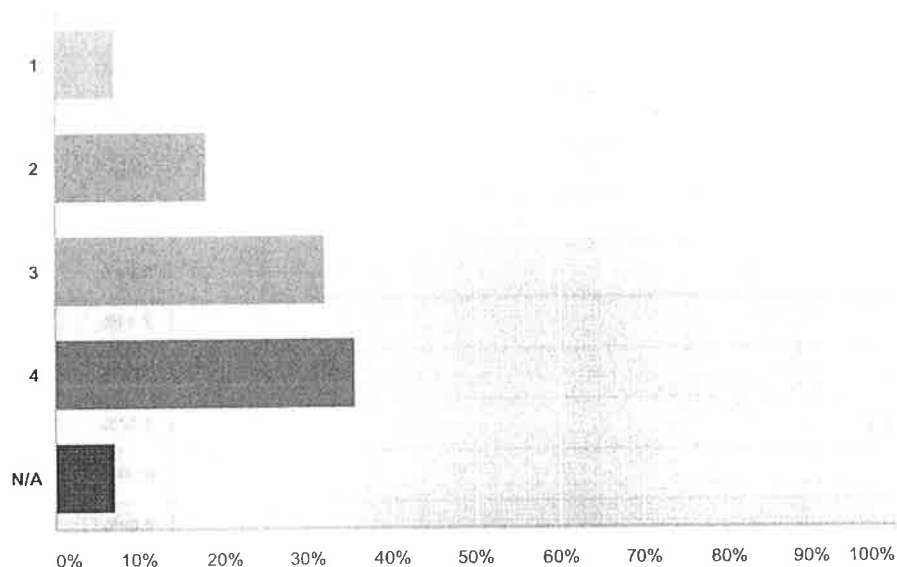
2017 Section Chair Survey on Conventions

Millard County	0.00%	0
Morgan County	0.00%	0
Piute County	0.00%	0
Rich County	0.00%	0
Salt Lake County	67.86%	19
San Juan County	0.00%	0
Sanpete County	0.00%	0
Sevier County	0.00%	0
Summit County	10.71%	3
Tooele County	0.00%	0
Uintah County	0.00%	0
Utah County	7.14%	2
Wasatch County	3.57%	1
Washington County	3.57%	1
Wayne County	0.00%	0
Weber County	0.00%	0
Total		28

2017 Section Chair Survey on Conventions

Q40 On a scale of 1-4, (4 being most important) how important is the overall cost of attending a convention to your decision whether to attend?

Answered: 28 Skipped: 1

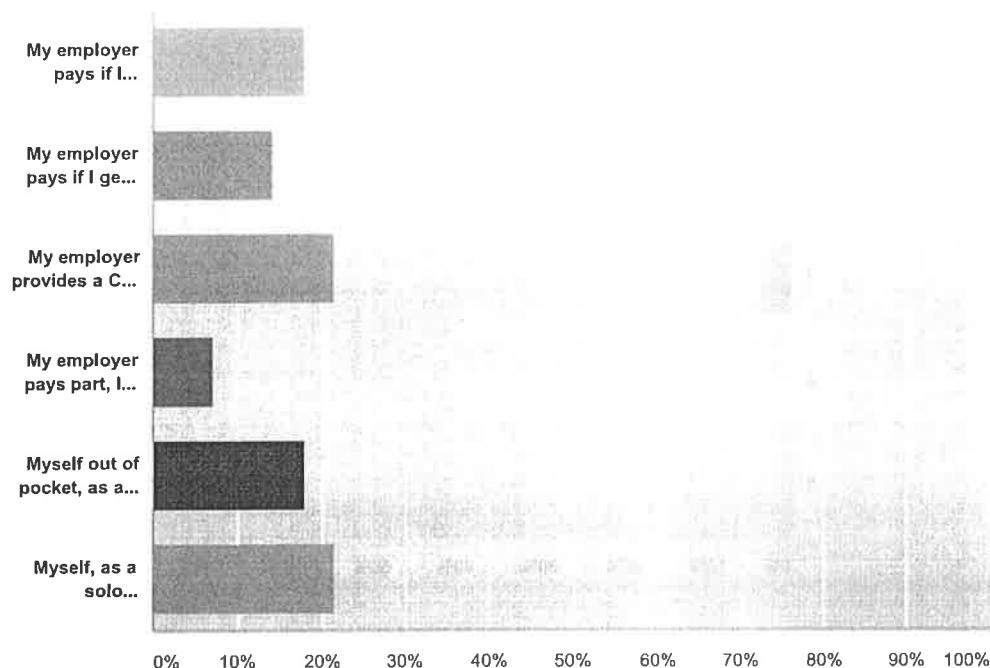


Answer Choices	Responses	
1	7.14%	2
2	17.86%	5
3	32.14%	9
4	35.71%	10
N/A	7.14%	2
Total		28

2017 Section Chair Survey on Conventions

Q41 Who would most likely pay for you to attend the next Summer Convention if you decided to attend?(Select the answer that most closely fits your situation)

Answered: 28 Skipped: 1

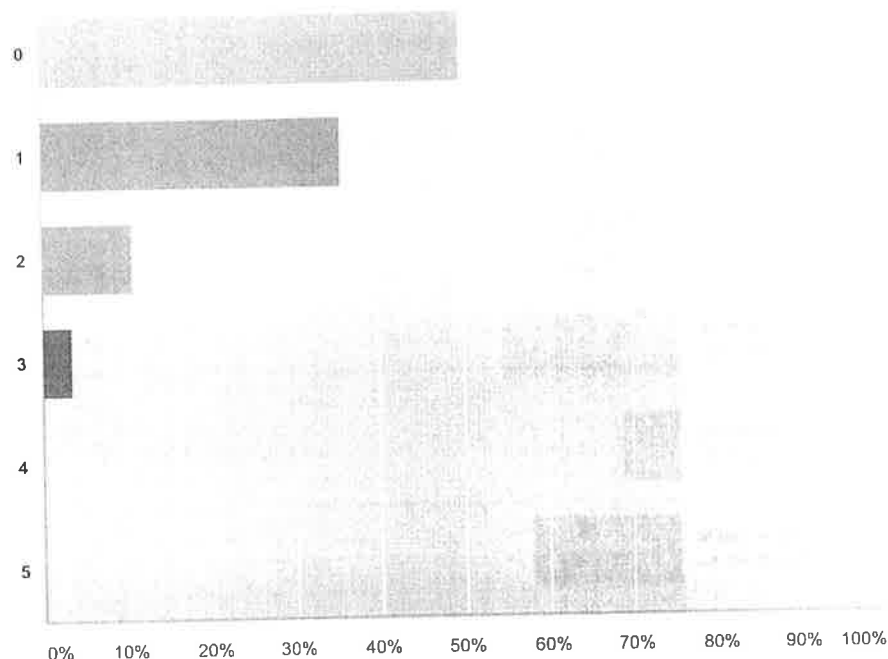


Answer Choices	Responses	
My employer pays if I request it.	17.86%	5
My employer pays if I get approval.	14.29%	4
My employer provides a CLE budget which I may use at my discretion to attend.	21.43%	6
My employer pays part, I pay the rest.	7.14%	2
Myself out of pocket, as an employee.	17.86%	5
Myself, as a solo practitioner or small firm owner.	21.43%	6
Total		28

2017 Section Chair Survey on Conventions

Q42 How often have you attended the Spring Convention in the last 5 years?

Answered: 28 Skipped: 1

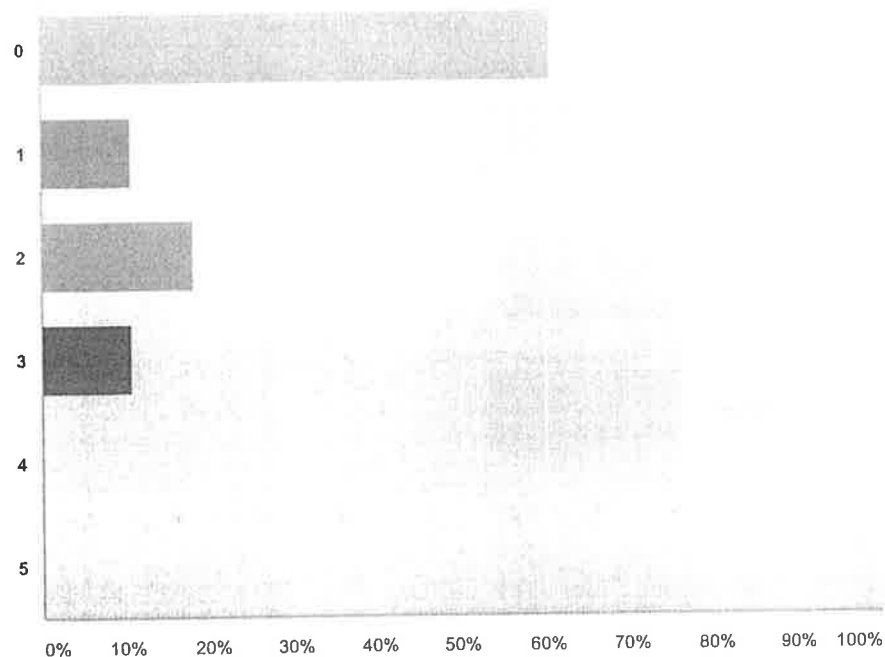


Answer Choices	Responses	
0	50.00%	14
1	35.71%	10
2	10.71%	3
3	3.57%	1
4	0.00%	0
5	0.00%	0
Total		28

2017 Section Chair Survey on Conventions

Q43 How often have you attended the Fall Forum in the last 5 years?

Answered: 28 Skipped: 1

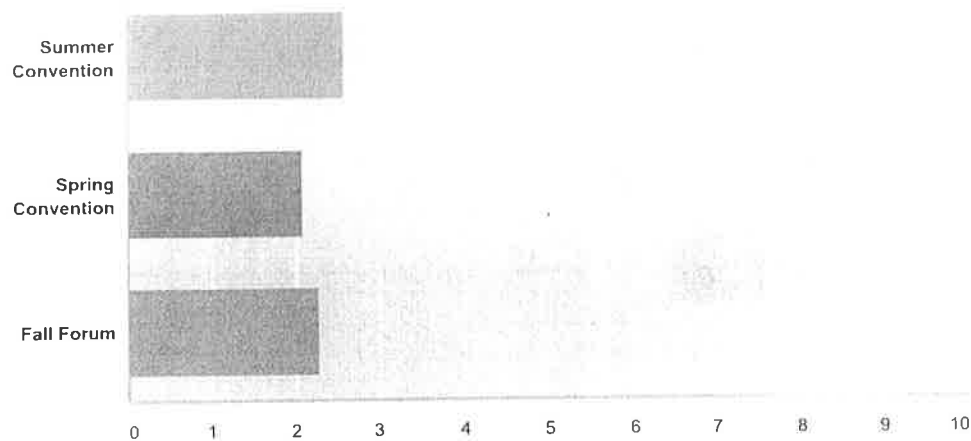


Answer Choices	Responses	
0	60.71%	17
1	10.71%	3
2	17.86%	5
3	10.71%	3
4	0.00%	0
5	0.00%	0
Total		28

2017 Section Chair Survey on Conventions

Q44 Please rank the following on a scale of 1-4 (4 being highest) as to how beneficial it is to you personally that the Bar continues to hold the following:

Answered: 26 Skipped: 3

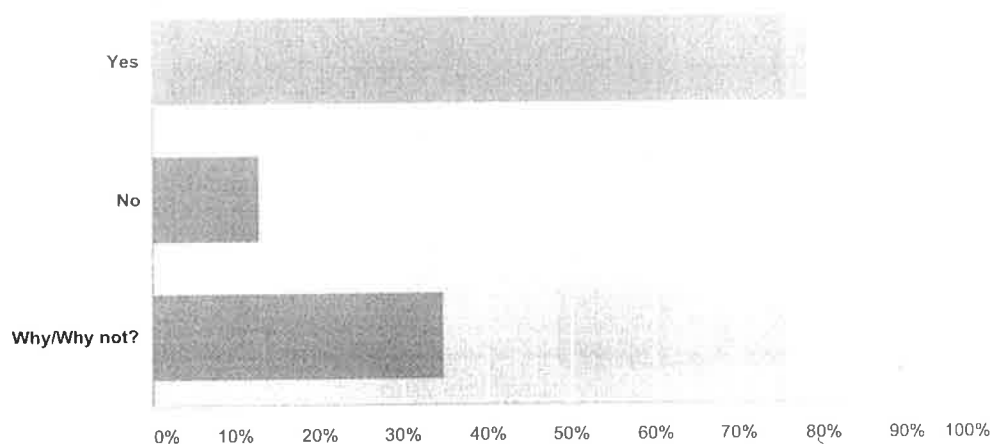


	1	2	3	4	(no label)	Total	Weighted Average
Summer Convention	26.92% 7	23.08% 6	23.08% 6	19.23% 5	7.69% 2	26	2.58
Spring Convention	38.46% 10	34.62% 9	15.38% 4	3.85% 1	7.69% 2	26	2.08
Fall Forum	42.31% 11	19.23% 5	15.38% 4	15.38% 4	7.69% 2	26	2.27

2017 Section Chair Survey on Conventions

Q45 Do you believe the Summer Convention should continue?

Answered: 23 Skipped: 6



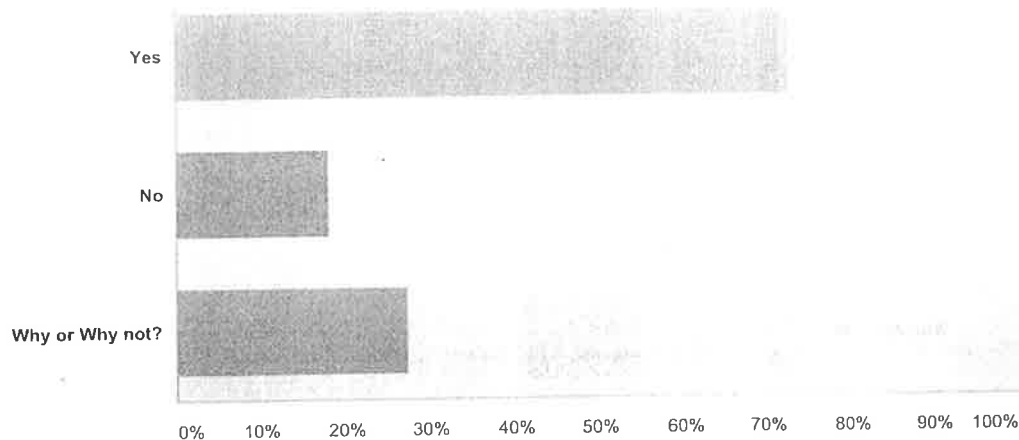
Answer Choices	Responses	
Yes	78.26%	18
No	13.04%	3
Why/Why not?	34.78%	8
Total Respondents: 23		

#	Why/Why not?	Date
1	While I do not always attend, I appreciate the opportunity.	1/24/2017 8:13 PM
2	Many members of the bar seem to benefit from the convention	1/24/2017 11:13 AM
3	Don't care	1/23/2017 11:17 AM
4	Good socializing, family event, some good CLE.	1/20/2017 4:35 PM
5	see below	1/19/2017 3:00 PM
6	Increases interaction between attorneys so as to improve professionalism between attorneys, and good chance to meet judges	1/16/2017 2:38 PM
7	Costs vs benefits. Money could be better spent on the remaining conferences and elsewhere to benefit bar members.	1/16/2017 10:35 AM
8	We don't need three conventions	1/13/2017 5:22 PM

2017 Section Chair Survey on Conventions

Q46 Do you believe the Spring Convention should continue?

Answered: 22 Skipped: 7



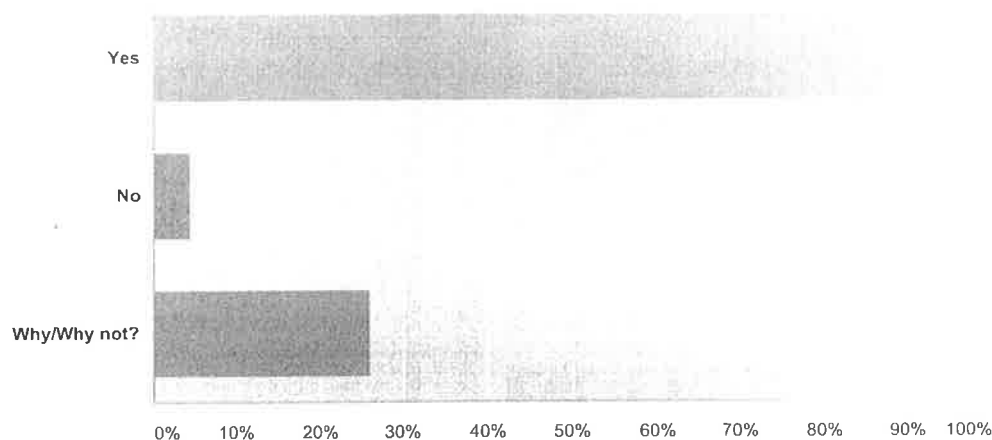
Answer Choices	Responses
Yes	72.73% 16
No	18.18% 4
Why or Why not?	27.27% 6
Total Respondents: 22	

#	Why or Why not?	Date
1	Don't care	1/23/2017 11:17 AM
2	Most likely, meets a different part of the Bar.	1/20/2017 4:35 PM
3	There is too much CLE programming already; I don't need a convention.	1/19/2017 3:00 PM
4	so long as in st george, more cost effective, fills a different need, I enjo	1/16/2017 2:38 PM
5	Important to have Southern Utah feel connected to the Utah Bar.	1/16/2017 10:35 AM
6	We don't need three conventions.	1/13/2017 5:22 PM

2017 Section Chair Survey on Conventions

Q47 Do you believe the Fall Forum should continue?

Answered: 23 Skipped: 6



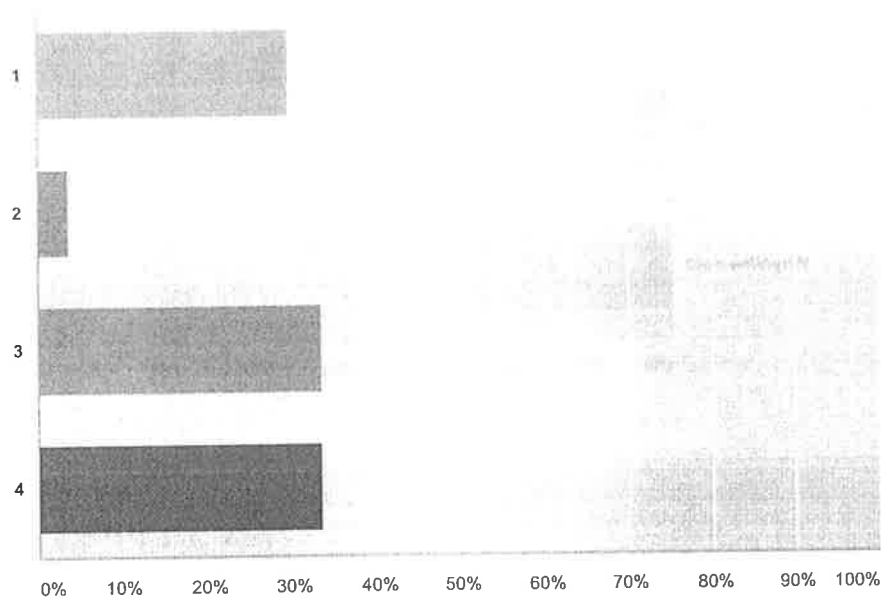
Answer Choices	Responses
Yes	86.96% 20
No	4.35% 1
Why/Why not?	26.09% 6
Total Respondents: 23	

#	Why/Why not?	Date
1	It's one day, local, and typically provides good material.	1/23/2017 3:10 PM
2	Don't care	1/23/2017 11:17 AM
3	Seems good for solo practitioners and small firms.	1/20/2017 4:35 PM
4	Fills a definite need for local CLE	1/16/2017 2:38 PM
5	A good conference for solo and small firms if some changes where made and perhaps some of the budget from summer was moved to fall (and spring).	1/16/2017 10:35 AM
6	We don't need three conventions.	1/13/2017 5:22 PM

2017 Section Chair Survey on Conventions

Q48 On a scale of 1-4 (4 being the highest), how much difference does it make to your attendance if a Supreme Court Justice is speaking at the Summer Convention?

Answered: 27 Skipped: 2

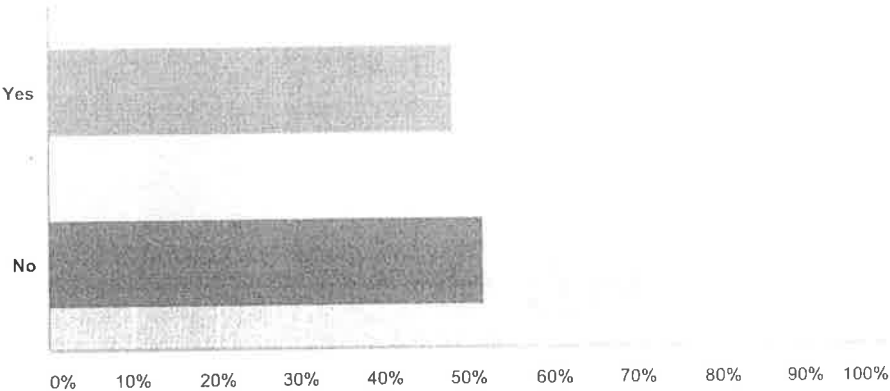


Answer Choices	Responses	
1	29.63%	8
2	3.70%	1
3	33.33%	9
4	33.33%	9
Total		27

2017 Section Chair Survey on Conventions

Q49 If conventions were to have less-prominent keynote speakers, would it make any difference in whether you would be likely to attend?

Answered: 27 Skipped: 2

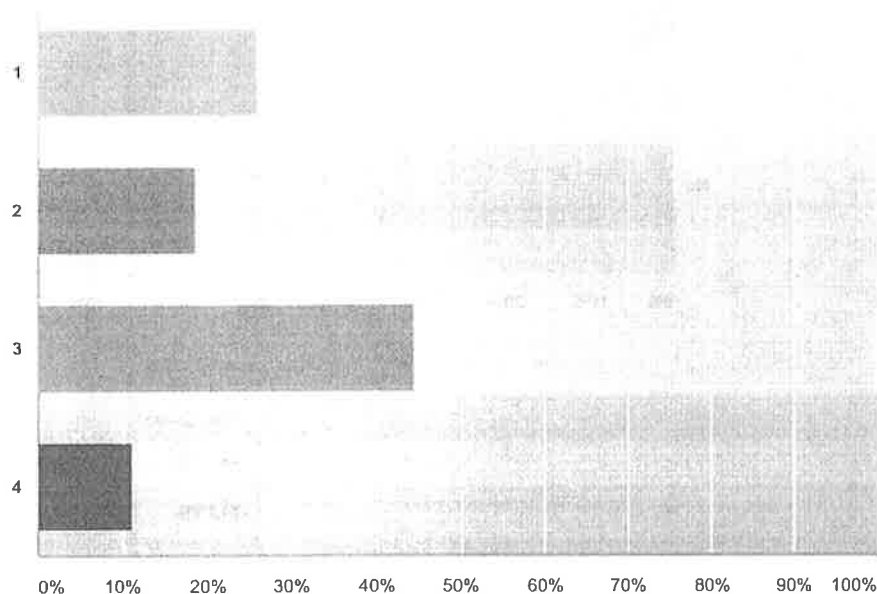


Answer Choices	Responses	
Yes	48.15%	13
No	51.85%	14
Total		27

2017 Section Chair Survey on Conventions

Q50 If the judges were having their annual convention in concert with the Summer Convention, and would be in attendance at many of the proceedings, on a scale of 1-4 (4 being highest) how much more likely would that fact make you want to attend?

Answered: 27 Skipped: 2



Answer Choices	Responses	
1	25.93%	7
2	18.52%	5
3	44.44%	12
4	11.11%	3
Total		27

2017 Section Chair Survey on Conventions

Q51 Please provide any additional comments you would like to make about the Summer Convention, Spring Convention, or Fall Forum that we have not addressed:

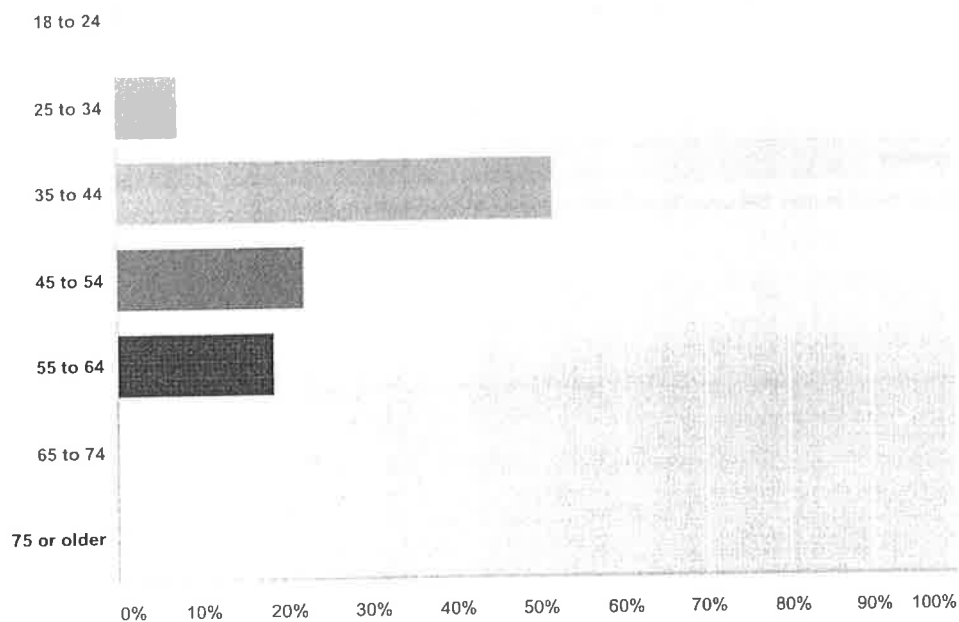
Answered: 1 Skipped: 28

#	Responses	Date
1	One convention, in either Salt Lake City or Park City, makes the most sense to me.	1/13/2017 5:22 PM

2017 Section Chair Survey on Conventions

Q52 What is your age?

Answered: 27 Skipped: 2

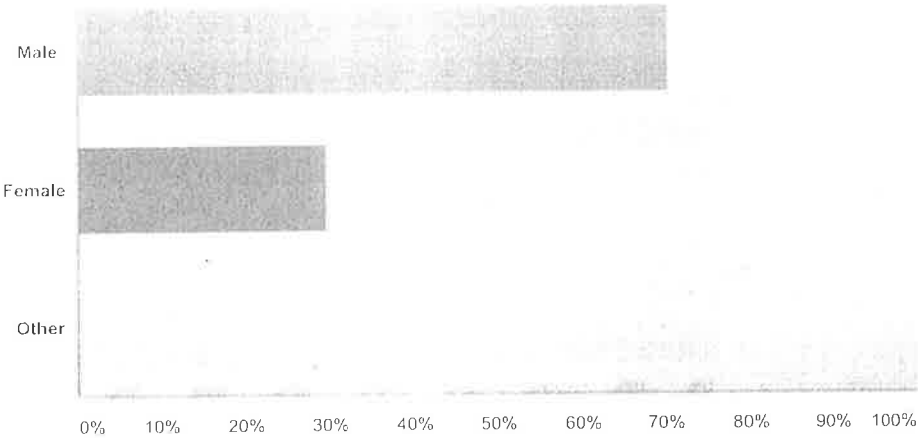


Answer Choices	Responses	
18 to 24	0.00%	0
25 to 34	7.41%	2
35 to 44	51.85%	14
45 to 54	22.22%	6
55 to 64	18.52%	5
65 to 74	0.00%	0
75 or older	0.00%	0
Total		27

2017 Section Chair Survey on Conventions

Q53 What is your gender?

Answers: 27 Skipped: 2

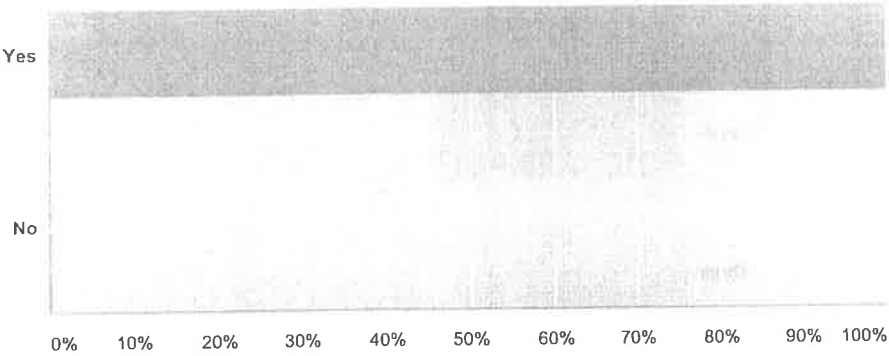


Answer Choices	Responses
Male	70.37%19
Female	29.63%8
Other	0.00%0
Total	27

2017 Section Chair Survey on Conventions

Q54 Are you currently actively practicing law?

Answered: 27 Skipped: 2

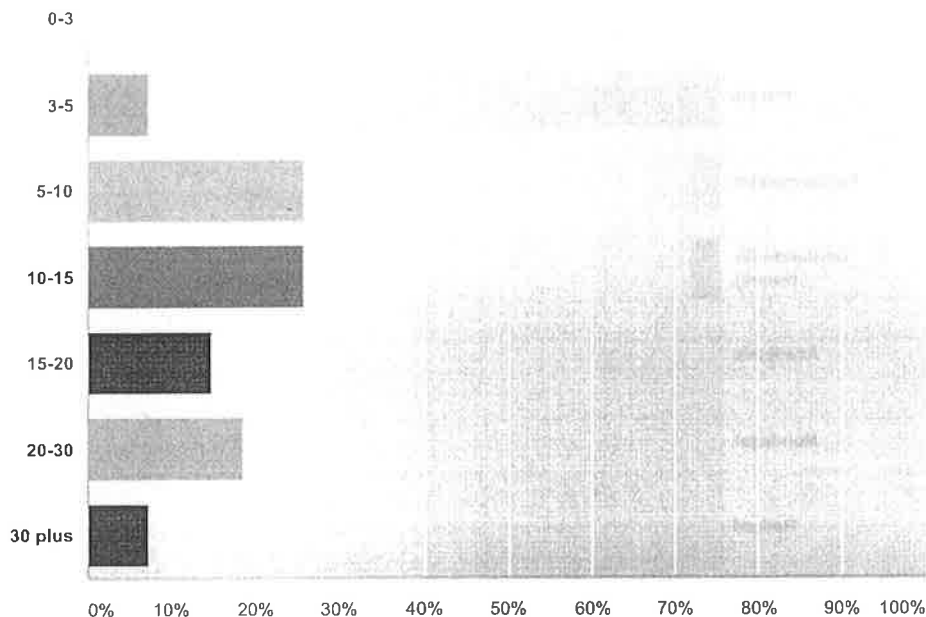


Answer Choices	Responses	
Yes	100.00%	27
No	0.00%	0
Total		27

2017 Section Chair Survey on Conventions

Q55 How many years have you been in practice?

Answered: 27 Skipped: 2

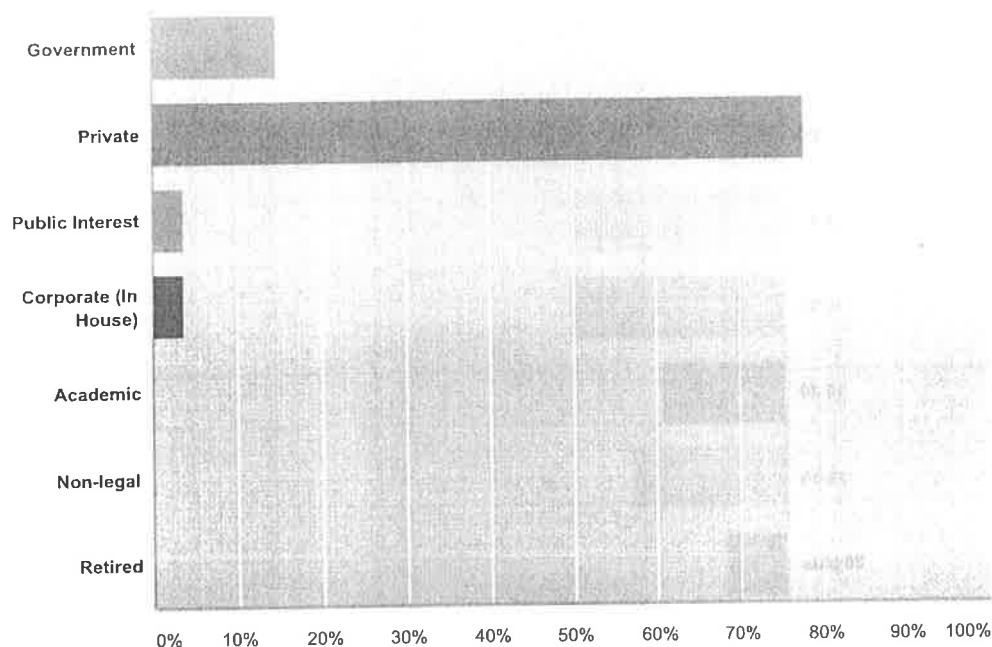


Answer Choices	Responses
0-3	0.00% 0
3-5	7.41% 2
5-10	25.93% 7
10-15	25.93% 7
15-20	14.81% 4
20-30	18.52% 5
30 plus	7.41% 2
Total	27

2017 Section Chair Survey on Conventions

Q56 What is the primary nature of your practice?

Answered: 27 Skipped: 2

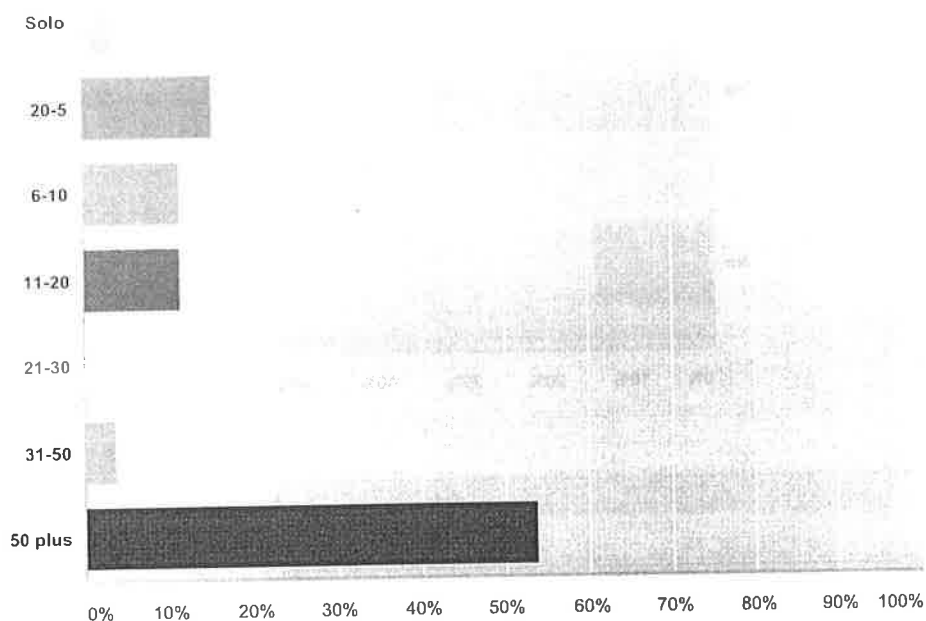


Answer Choices	Responses	
Government	14.81%	4
Private	77.78%	21
Public Interest	3.70%	1
Corporate (In House)	3.70%	1
Academic	0.00%	0
Non-legal	0.00%	0
Retired	0.00%	0
Total		27

2017 Section Chair Survey on Conventions

Q57 How many attorneys are employed at your firm/entity?

Answered: 26 Skipped: 3

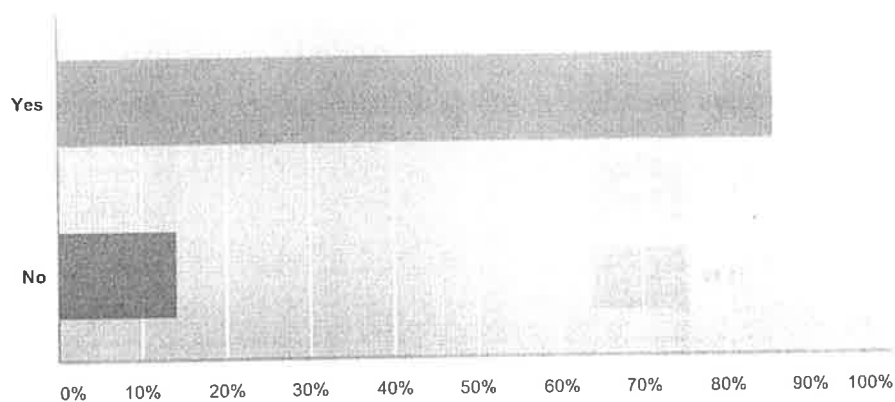


Answer Choices	Responses	
Solo	3.85%	1
20-5	15.38%	4
6-10	11.54%	3
11-20	11.54%	3
21-30	0.00%	0
31-50	3.85%	1
50 plus	53.85%	14
Total		26

2017 Section Chair Survey on Conventions

Q58 Do you currently serve on any Utah Bar related committees, commissions, sections, groups, etc.

Answered: 28 Skipped: 1

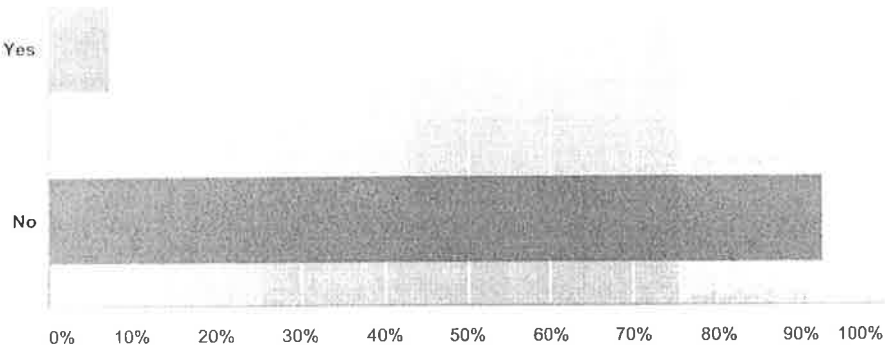


Answer Choices	Responses	
Yes	85.71%	24
No	14.29%	4
Total		28

2017 Section Chair Survey on Conventions

Q59 Do you currently serve on a Supreme Court advisory committee?

Answered: 27 Skipped: 2

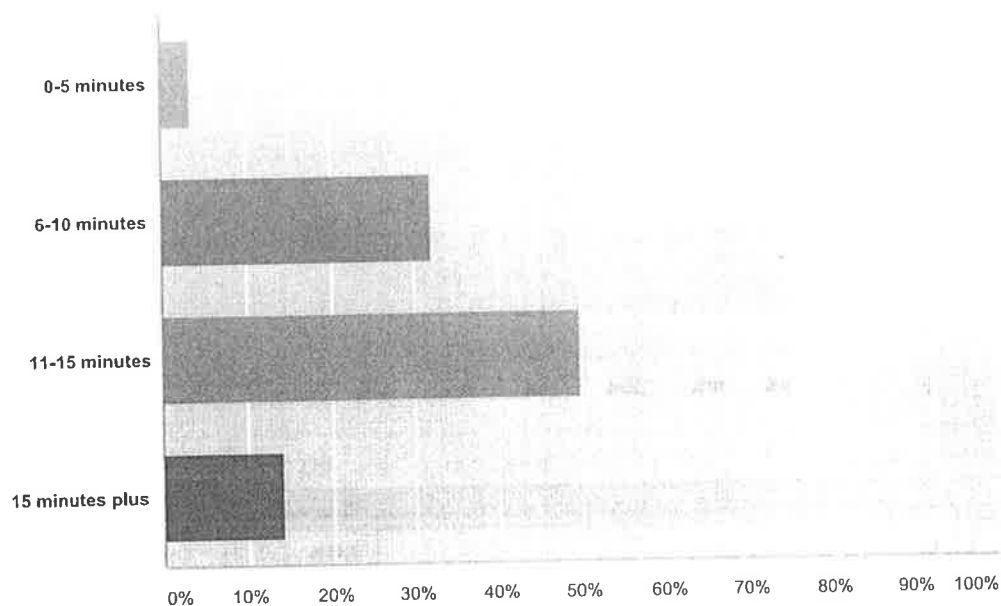


Answer Choices	Responses	
Yes	7.41%	2
No	92.59%	25
Total		27

2017 Section Chair Survey on Conventions

Q60 How long did it take you to respond to this survey?

Answered: 28 Skipped: 1

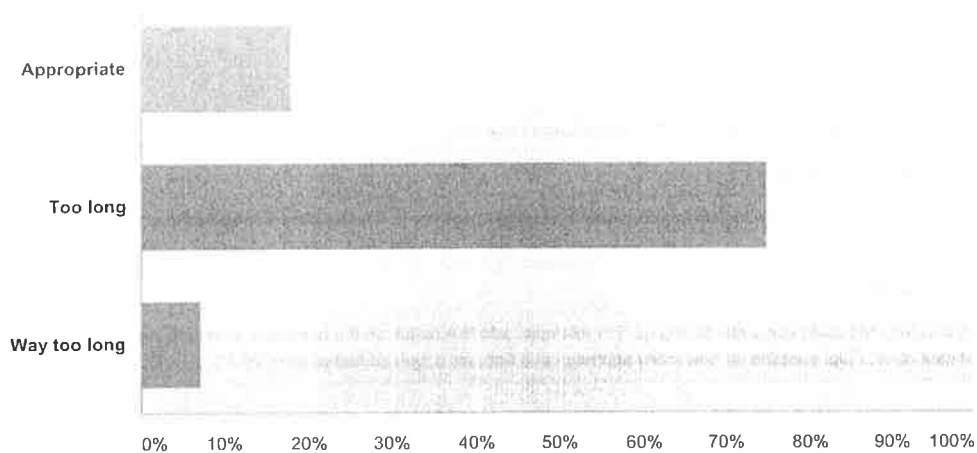


Answer Choices	Responses	
0-5 minutes	3.57%	1
6-10 minutes	32.14%	9
11-15 minutes	50.00%	14
15 minutes plus	14.29%	4
Total		28

2017 Section Chair Survey on Conventions

Q61 The length of the Survey given the subject matter was:

Answered: 28 Skipped: 1



Answer Choices	Responses
Appropriate	17.86% 5
Too long	75.00% 21
Way too long	7.14% 2
Total	28

2017 Section Chair Survey on Conventions

Q62 Please identify any questions which were confusing:

Answered: 6 Skipped: 23

#	Responses	Date
1	I don't have the questions in front of me.	1/24/2017 11:15 AM
2	#57 --I think you meant "2 - 5" instead of "20 - 5" (at least I hope so).	1/23/2017 3:12 PM
3	The within 10 years and years 1-5 of attending the summer bar convention were confusing and seemed duplicative.	1/19/2017 3:02 PM
4	The number should have been high to low consistently instead of sometime 4 being good and sometimes 1 being good.	1/17/2017 11:07 AM
5	Rotation of location	1/16/2017 2:39 PM
6	Not confusing - but could use some tidying up. For example, add N/A option on the questions regarding spouse or significant other. Also, question on how many attorneys at a firm has a typo on first option ("20-5")	1/16/2017 10:37 AM

2017 Section Chair Survey on Conventions

Q63 Were there any questions you think we should not ask?

Answered: 4 Skipped: 25

#	Responses	Date
1	No.	1/24/2017 11:15 AM
2	It seems like all the questions related to why or why not you attend the bar convention could be simplified and reduced.	1/19/2017 3:02 PM
3	Some of the questions about cost and presenters seemed a little redundant.	1/17/2017 11:07 AM
4	Several of the questions seemed repetitive, but I did not take notes.	1/13/2017 5:22 PM

2017 Section Chair Survey on Conventions

Q64 Are there any questions you think we should ask, that are not currently on the Survey?

Answered: 3 Skipped: 26

#	Responses	Date
1	No.	1/24/2017 11:15 AM
2	No	1/19/2017 3:02 PM
3	Maybe a question about what topics or presenters people would like to see, and a question about the usefulness of breakout sessions.	1/17/2017 11:07 AM

APPENDIX

4

State	Mandatory	No. members	Conventions?		Attendance
Colorado	No	21781	15 Years since they stop Conventions	Stop because of attendance levels	
Idaho		4904			
Nevada	Yes	7219	1 Annual, out of state	talking about holding Conference in state to increase numbers	200
New Mexico	Yes	5581	1 Annual		
Arizona	Yes	15925	1 Annual	larger number in Phoenix than in Tucson, Sections pay for their portion	1200-1400
Oregon	yes	12475	NO, stop in early 2000	dramatically shrinking attendance	
Washington	Yes	25577	No	Bar became too large, Now have large practice specific meetings	
Maine	No	3931	Yes, Just cut back to 1 from 2	Lack of attendance	175-225
Alaska		2439			
New Hampshire	Yes	3506	Annual and Mid-Year both 1 day long	pared down ea. to one day 9 years ago because of attendance and cost	100-125 Annual, 500 Mid-Year
Florida	Yes	75596	See brochure		?
Louisiana	Yes	19099	2 annually Jan & June	Annual in June, Destin FL., Jan. mid-Year New Orleans and is free	Annual 526, Mid-Year less
So. Carolina	Yes	10208	1 annually, 3 full days	http://discussions.scbare.org/public/convention17.index.html	600-800 +100 Judges
				judicial conference included, conference right before compliance	

				ITEMS THE STATES HAVE IN COMMON:	
				Sections have events for their sections within the convention	
				The judicial conference is held within the Convention	
				They hold the convention in close proximity to compliance time	

APPENDIX

5

SUMMER CONVENTION				Staffing Comparisons			
Year/Resort	profit/-loss	total registered	comp'd registrant				
1985 (Sun Valley)		188	12	4 Staff	Sun Valley	Park City	San Diego
1986 (Sun Valley)		282	0	per diem	674		216 489
1987 (Utah)		226	25	lodging	3780		1512 2685
1988 (Calf)		352	24	mileage	2360		232 1650
1989 (Sun Valley)		307	30		6814		1960 4824
1990 (Sun Valley)	32,728.00	408	45				
1991 (Sun Valley)	20,392.00	534	66				
1992 (Sun Valley)	15,711.00	488	87				
1993 (Sun Valley)	17,480.00	605	73				
1994 (Sun Valley)	-12,033.00	514	44				
1995 (San Diego) Hotel Del Coronado	30,498.00	455	57				
1997 (Sun Valley)	-10,346.00	526	71	Park City Canyons Resort			
1997 (Sun Valley)	21,612.00	527	53	Guest lodging offered at 3 properties within Canyons Resort (12.06% - total tax			
1998 (Sun Valley)	18,932.00	541	42	• 1) Grand Summit Hotel (\$30/night - Resort Fee)			
1999 (Sun Valley)	-18,674.00	568	8	Standard guest room - \$154			
2000 (San Diego) Hotel Del Coronado	21,515.00	479	49	One Bedroom Suite - \$196			
2001 (Sun Valley)	-10,202.00	542	18	• 2) Sundial Standard guest room - \$129 (\$20/night - Resort Fee)			
2002 (Sun Valley)	327	327	39	One Bedroom Suite - \$182			
2003 (Sun Valley)	-4,356.00	496	33	Two Bedroom Suite - \$229			
2004 (Sun Valley)	-2,262.00	350	57	• 3) Silverado Standard guest room - \$124 (\$20/night - Resort Fee)			
2005 (Sun Valley)	3,210.00	438	29	One Bedroom Suite - \$582			
2006 (Newport) Newport Beach Marriott	-32,250.00	367	3	Two Bedroom Suite - \$216			
2007 (Sun Valley)	3,707.00	450	53	• One-time meeting room rental fee - \$5,000.			
2008 (Sun Valley)	10,097.00	419	67	Food and Beverage Minimum \$39,000 (+31.5% Tax & Service Chrg.)			
2009 (Sun Valley)	18,236.00	424	38	Total square feet (Grand Summit) - 15,327 (indoor only)/(Kokopelli Grand Ballroom - 5,967)			
2010 (Sun Valley)	12,086.00	359	34	Outdoor Meeting Space			
2011 (San Diego) Manchester Grand Hyatt	-11,692.00	381	65	The Forum - 10,000, Sundial Pavilion - 6,400			
2012 (Sun Valley)	-31,196.00	385	79	Stein Erksen Lodge Deer Valley			
2013 (Snowmass)	-101,418.00	329	90	• Standard guest room - \$309 (10.95% occupancy tax) + daily Resort Fee - \$25			
2014 (Snowmass)	-118,693.00	281	103	• Valet Parking - \$14/day			
2015 (Sun Valley)	-11,790.00	409	80	• Food & Beverage minimum - \$90,000 (31.95% Sales Tax/Service Charge)			
2016 (San Diego) Loews	-5,242.00	358	56	• 4,050 square foot Olympic Ballroom			
				• 5,852 square foot Stein Erksen Ballroom			
				If we meet F&B minimums, meeting rooms rental fees are waived			
				The Chateaux Deer Valley			
				• Standard guest room - \$199 (10.95% occupancy tax) + daily Resort Fee - \$15			
				• Food & Beverage minimum - \$80,000 (29.95% Sales Tax/Service Charge)			
				• 6,627 square foot Impressionist Ballroom - cannot accommodate breakout rooms other than to close the walls of the Ballroom.			
				If we meet F&B minimums, meeting rooms rental fees are waived			
				Sun Valley 2017			
				Inn Standard \$205			
				• Inn Deluxe- \$294			
				• Lodge Premier- \$329			
				• Lodge Suite- \$389			
				• Lodgedouble Queen- \$399			
				• Food & Beverage minimum - \$99,694.50 (30% Sales Tax/Service Charge)			
				• Meeting space \$9,400, sq. ft. 13,167 (indoor only)/(4,125 Unelights Ballroom)			
				No prefixed outdoor meeting space			
				Loews 2016			
				Standard room - \$239			
				F&B minimum - \$75,000 (Service Charge-23%, Sales Tax-8%)			
				Meeting room space waived			
				Sun Valley 2015			
				Lodge Standard - \$300			
				Inn Standard - \$189			
				F&B minimum - \$90,585 (Service Charge-20%, Sales Tax-10%)			
				Meeting room rate - \$1,850/day			

APPENDIX

6

**REPORT OF THE
SUMMER CONVENTION REVIEW COMMITTEE
OCTOBER 2015**

Charge to the Summer Convention Review Committee from the Bar President:

“to evaluate the effectiveness of the [Summer] Convention and to consider what the Bar’s long term plans should be for the Summer Convention for the years 2018 and beyond, considering the Convention goals, attendance, cost, and other factors. Please recommend any improvements to Convention planning and execution.”

To address and respond to the charge stated above, starting in Fall 2014, the Committee conducted a review and investigation of the goals of the Convention, how they are being met, and past performance in terms of attendance and cost to the Bar. Specifically, the Committee considered the following information which is also attached hereto as part of the Appendices to this Report:

- 1) Results of past Summer Conventions, Spring Conventions and Fall Forum meetings in terms of attendance and costs to the Bar (Appendix 1)
- 2) Recent survey results of Convention attendees (Appendix 2)
- 3) 2011 Dan Jones survey results of all Bar membership relating to the Conventions (Appendix 3)
- 4) Information regarding potential Convention venues in Park City, Utah (Appendix 4)
- 5) Report as to Convention practices of other Western States [Richard – what should this be called] (Appendix 5).

Additionally, the Committee conducted a unique, focus group-type discussion with the Chairs and Presidents of all Utah Bar sections and affinity groups, addressing the value of Summer Convention and the reasons membership did or did not attend. The Committee also met on several occasions with the Utah Bar CLE Advisory Committee, which had a specific charge in 2014-15 of helping to increase attendance at the 2015 Summer Convention in Sun Valley. These meetings provided valuable information concerning the motivations, draws and purposes Bar members have or perceive in deciding whether to attend the Summer Conventions.

Finally, this Committee considered the results of the most recent Summer Convention in July 2015 which, after two years in Snowmass, Colorado (where the Convention was not successful in terms of attendance and cost to the Bar), returned to Sun Valley, Idaho. This Committee recently received the final accounting from that Convention as to attendance and costs, which results are included in this Report.¹

¹ This Report was initially intended to be presented to the Commission in July 2015, but during the course of the Review the Commission instructed this Committee to delay finalizing this Report until the attendance and costs of the 2015 Summer Convention were available. The 2015 Summer Convention attendance and costs are listed in Appendix 1.

Findings and Recommendations

FINDINGS:

1. The Summer Convention has a long tradition with the Utah State Bar and has succeeded in meeting several important needs. Those needs could be summarized as specific goals of the Summer Convention as follows:
 - Serving as the annual business meeting of the Bar²
 - Providing unique and generally high quality CLE
 - Providing social and networking opportunities for Bar members and their families
 - Grooming and mentoring of future Bar leaders
 - Fostering and preserving a tradition of Bar membership, Bar leadership and Judges socializing with and learning from each other, while promoting collegiality, professional respect and common purpose among the members of the Bar
 - Remaining, along with the other major conventions of the Bar, financially self-sustaining so that the Convention is not supported by the Bar membership at large, most of whom do not attend the Convention
2. Recent years have shown a trend of decreasing attendance at the Summer Convention, particularly in relation to the increasing number of Bar members, resulting from several factors including, at least:
 - Downturns in the economy
 - Reductions in reimbursements from law firms, particularly to young lawyers
 - Increased young lawyers practicing in solo or small firms
 - Cultural views and/or attitudes of various groups of lawyers, including younger lawyers, towards the practice of law and the role of the Bar, including the need or desirability of participating in Bar events
 - Increased local, web-based and specialized CLE offerings, including from third-party CLE providers, Fall Forum and Section-sponsored CLE events
 - Changes from traditional Summer Convention venues
3. The Sun Valley Resort has, over the years, increased its costs to the Bar and has demonstrated little flexibility in negotiating lower costs to the Bar and its members.
4. In spite of somewhat decreased attendance and difficulty in reaching profitability to the Bar, the Summer Convention has lost significant sums only during the two events in 2013

² Rule 14-103(j) of the Supreme Court's Rules Governing the Utah State Bar provides that "[t]here shall be an annual meeting of the Bar, presided over by the president of the Bar, open to all members in good standing, and held at such time and place as the Board may designate, for the discussion of the affairs of the Bar and the administration of justice."

and 2014 in Snowmass, Colorado, when losses exceeded \$100,000 each year. In other years, the costs to the Bar have ranged, in the past ten years, between losses of \$32,250 (Newport 2006) and profits of \$18,236 (Sun Valley 2009). These numbers are consistent with Conventions going back to 1990. Further, when looked at together, the three major conventions have consistently broken even or resulted in positive revenues for the Bar, with the notable exception of the two years the Summer Convention was held in Snowmass.

5. Each of the three conventions seems to address a distinct audience, summarized as follows:
 - The Summer Convention is recognized as the Bar's "Annual" Convention, as the business of the Bar takes place, including swearing in of the new President, President-Elect and Bar Commissioners, reports from the Bar, the Courts and the Law Schools, etc. Many attendees have been coming with their families for many years and include a large number of State and Federal Court Judges. However, because of the cost and the distance from the Wasatch Front, many attendees are from larger Salt Lake City law firms. Many are also older members of the Bar. Among some solo and small firm lawyers, the Summer Convention is perceived to be intended for an elite group of Bar members.
 - The Spring Convention in St. George remains well-attended and financially viable, and has its own attendance group that does not appear to be impacted by any changes to the Summer Convention. Attendees are perceived to be a wider cross-section of Bar members including younger lawyers and more solo and small firm practitioners than attend the Summer Convention.
 - The Fall Forum has become the most successful Convention in terms of attendance and profitability. It does not, however, have a focus on networking and sociability among Bar members as the goal of most attendees is to gain inexpensive CLE hours. As a result, it has historically and primarily met the CLE goal (among those identified above), but not the others. It is believed that the largest number of solo and small firm practitioners attend this Convention.³
6. The Utah Bar appears to be unique among state bar organizations in having three major convention-sized events, and for holding one of them out-of-state. Some states do not hold annual conventions at all. (*See*, Appendix 5).
7. Viable venues for a Summer Convention away from the Wasatch Front are limited. The 2013 and 2014 Conventions did not succeed financially, primarily because of low attendance (*See*, Appendix 1). There are probably multiple factors for that low

³ The Committee notes that Fall Forum 2015 is experimenting with a two-day format and increased networking opportunities. The results of this experiment might conceivably impact Summer Conventions in the future, or the interactions of the three conventions.

attendance but two frequently cited reasons are distance (it is 1.5 to 2 hours further away from the Wasatch Front than Sun Valley), and unfamiliarity. There is an established tradition of going to Sun Valley (with periodic exceptions to Southern California), and many of those regular attendees chose not to go to Colorado, in spite of lower lodging and other costs than Sun Valley. Thus, the Bar should be exceedingly cautious in scheduling future Summer Conventions at locations unfamiliar to the Bar membership. Investigation into Park City venues also revealed limited options with essentially no single venue that could provide sufficient rooms, and apparently only one (the Chateaux) with meeting space that could presently accommodate even 400 in a single room.

RECOMMENDATIONS:

1. Continue with Sun Valley/California Rotation.

So long as attendance levels support a near break-even model (consistent with the financial results of the past ten years of conventions – excluding the Snowmass conventions), the Committee recommends continuing to have the Summer Convention in Sun Valley, with a rotation every 4-5 years in California. This practice, which has been in place for most of the past twenty-five years (with the notable exception of the Snowmass conventions), has largely met the goals of the Convention as set forth above.

The Committee also makes the following additional recommendations regarding the Summer Convention:

Continue efforts to increase attendance of Young Lawyers such as those recently adopted, including use of technology (the Convention app, social media, sponsoring young lawyer-focused social events, and encouraging firms to send young lawyers

- Continue to encourage Judges' attendance at Summer Convention, including by providing complimentary registration
- Consider increased efforts to involve larger Sections in providing specialized CLE at Summer Convention

2. Plan for Possible Alternatives as Attendance and Financial Results Change.

Importantly, the Committee recognizes that factors such as changes in the practice of law, demographics and economics (as discussed in the Findings above) may eventually result in low enough attendance and high enough costs that the Sun Valley location will become less feasible. At such time, the Committee suggests other options be considered, including the following:

- a. Eliminate the Summer Convention entirely. The Bar could then hold its required "annual business meeting" during the Fall Forum, the Spring Convention or as a stand-alone business meeting of the Bar.
- b. Move Fall Forum to summer in Salt Lake City and make it the "annual business meeting" of the Bar. Optionally, the Fall Forum could be replaced with an annual

“Fall Convention” away from the Wasatch Front as a “replacement” for more social aspects of the Summer Convention. A few additional points were noted regarding a possible move of the Fall Forum:

- A Fall Forum-turned-Summer Convention, in Salt Lake City, could become the Bar’s annual business meeting, but also continue its successful focus on CLE.
- A new Salt Lake City-based Summer Convention could also be moved from July to late June to coincide with the Bar’s June 30 CLE reporting deadline, and the Bar could consider allowing some CLE to count for both reporting periods – or for either at the member’s election.
- A new “Fall Convention” away from the Wasatch Front (not to be confused with the present Fall Forum, which would move to the summer as indicated) could help replace some of the social and networking aspects of the present Summer Convention. By being a destination convention, attendees can mingle and socialize outside of meetings. It could be scheduled in connection with the annual UEA Convention to allow families to attend. It would likely be a smaller event, allowing for venues in Park City to be considered. A Fall Convention could also take advantage of “shoulder season” discounts. It should be noted that a new Fall Convention would likely attract many of the larger firm and senior lawyers, and fewer younger attorneys, solo and small firm lawyers, as it would necessarily be more expensive than the present Fall Forum.

Respectfully submitted,

Summer Convention Review Committee, October 2015

H. Dickson Burton, Chair
 James D. Gilson
 Angelina Tsu
 Heather Farnsworth
 Curtis M. Jensen
 Aida Neimarlija
 Jonathan O. Hafen

APPENDIX

7

Complimentary Convention Registrations

Specifically Listed in Bar's Policies and Procedures Manual

1. Commissioners
2. Visiting Bar Presidents (Annual and Spring)
3. Convention Chairs
4. Bar President and President-elect
5. Speakers and Panel Members (50%)
6. Award Recipients (Annual and Spring)
7. Judges (Annual and Spring)

By Policy

1. Attorney Legislators
2. Fall Forum complimentary for Award Recipients and Judges even though written policy says only Annual and Spring conventions.
3. Spring and Annual committee members receive a 50% discount.
4. Fall Forum only – All committee members and speakers who register and stay for the conference receive complimentary registration.

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B. Financial.

2. Authorized Expenditures and Procedures for Reimbursement.

(5) Commissioner Convention and Bar-Sponsored CLE Waiver.

Registration fees to Bar Conventions and all Bar-sponsored CLE events shall be waived for Commissioners in order to encourage visibility, participation and access for our membership.

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C. Fall Forum, Annual and Spring Convention Expenses.

1. Visiting Bar Presidents.

Visiting bar presidents and their spouse/guest (excluding other family members) shall receive reimbursement for expenses in attending the Annual and Spring Conventions when those same expenses are reimbursed to the Bar when the Utah State Bar President visits that president's bar convention. These expenses may include a full registration package including all meal functions, and sporting events; and room accommodations up to and including four nights. Each visiting bar president shall pay for his or her accommodations and request reimbursement in accordance with the provisions above.

2. Fall Forum, Annual and Spring Convention Chairs.

Complimentary convention registration will be provided for the Fall Forum, Annual and Spring Convention Chairs. Mileage reimbursement and lodging at the convention hotel shall be provided for the chairs of the Annual and Spring Conventions.

3. Convention Committee Members.

Annual and Spring Convention Committee members receive a 50% registration discount for those conventions. Fall Forum committee members who register and stay for the convention receive complimentary registration.

34. Utah State Bar President and President-elect.

A full complimentary registration package, including lodging, all meal functions and sporting events shall be provided for the President and his or her spouse/guest for the Annual and Spring Conventions. A full complimentary registration package, including lodging, all meal functions and sporting events, shall be provided for the President-elect and his or her spouse/guest for the Spring Convention.

45. Speakers and Panel Members.

Speakers and panelists who are members of the Bar participating at the Fall Forum, Annual or Spring Conventions shall be provided with a 50% convention registration discount. Fall Forum speakers who register and stay for the convention receive complimentary registration.

56. Awards Recipients.

Award recipients shall be provided with two complimentary tickets to an awards luncheon (if one is held), and complimentary convention registration for the Fall Forum, Annual and Spring Conventions. Award Recipients will be provided with one night lodging at the convention hotel and mileage reimbursement at the Annual and Spring Conventions.

67. Judges.

Judges shall be provided with complimentary convention registration to the Fall Forum, Annual and Spring Conventions.

8. Attorneys.

Attorney Legislators shall be provided with complimentary convention registration to the Fall Forum, Annual and Spring Conventions.

TAB
10

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

APRIL 14, 2017

LAW AND JUSTICE CENTER

- In Attendance:** President Rob Rice, President-elect John Lund, Commissioners: Grace Acosta, John Bradley, Steven Burt, H. Dickson Burton, Kate Conyers, Heather Farnsworth, Liisa Hancock, Michelle Mumford, Herm Olsen, Cara Tangaro, Heather Thuet, and Katie Woods.
- Ex-Officio Members:** Nate Alder, Jaelynn Jenkins, Michelle Kennedy, Margaret Plane, Dean Gordon Smith, Chris Wharton, and Supreme Court Liaison James Ishida.
- Not in Attendance:** Mary Kay Griffin; Ex-Officio Members: Dean Robert Adler, Julie Emery, Amy Fowler, Noella Sudbury, Melinda Bowen, and Angelina Tsu.
- Also in Attendance:** Executive Director John C. Baldwin, Assistant Executive Director Richard Dibblee and General Counsel Elizabeth A. Wright.

Minutes: 9:00 a.m. start

1. President's Report: Rob Rice

- 1.1 Presentation of Raymond Uno Award to Judge Vernice Trease.** Judge Trease was not able to be in St. George in March to receive the award so the Commission presented her with the award at the Commission meeting.
- 1.2 Admissions Committee Report on Rule Changes.** In response to a request from the Commission, the Admissions Committee presented a proposed temporary practice rule under which lawyers licensed in other jurisdictions could practice law in Utah after submitting an application and waiting for full admission to the Bar. The applicants would have to meet certain conditions including supervision by a Utah attorney.

Heather Thuet was assigned to compile the Commissioner's questions and concerns regarding the rule and propose redline edits for discussion at the next Commission Meeting.

2. Action Items

- 2.1 Nominate 5th District Judicial Nominating Commissioners.** After the Commission discussed the applicants, John Lund moved to nominate **Katie Woods, Ryan Stout, Terry Wade, and Michael Edwards** to present to the Governor for the 5th Judicial

District Nominating Commission. **Kate Conyers** seconded the motion which passed unopposed. **Katie Woods** recused herself from the discussion and the vote.

- 2.2 Resolution in Support of Legal Services Funding.** The Commission discussed a resolution urging Congress to continue funding the Legal Services Corporation. Margaret Plane proposed some changes to the language. **Herm Olsen moved to approve the Resolution with the proposed changes. Liisa Hancock seconded the motion which passed unopposed.**
- 2.3 WIPFLi Reports and Recommendations.** John Baldwin prepared a series of proposed actions to be implemented in response to the recommendations made by WIPFLi in its Fiscal Process Review and Wage Comparability Study that was presented to the Commission at the March 9, 2017 meeting.

WIPFLi Fiscal Review.

Proposed Action #1 (Reassignment of some administrative duties). **Michelle Mumford** moved to approve proposed action #1. Herm Olsen seconded the motion which passed unopposed. **John Lund** moved that action on Proposed Action #1 was conditional on Proposed Action #2. **Heather Farnsworth** seconded the motion which passed unopposed.

Proposed Action #2 (Review of staff responsibilities and operations and an expenditure of up to \$20,000 to change a part-time position to a full-time position). **Kate Conyers** moved to approve Proposed Action #2. **John Lund** seconded the motion which passed unopposed.

Proposed Action #3 (\$3375 per month for an outside IT vendor to cover some IT duties in order to free up 20 hours per week of current IT Director's time). **Dickson Burton** moved to approve Proposed Action #3 with the provision that a more permanent plan for WIPFLi's IT recommendations be made within six months. **Liisa Hancock** seconded the motion which passed unopposed.

Proposed Actions #4-7 (Commission and staff more involved in budgeting procedures). **Michelle Mumford** moved to approve Proposed Actions 4-7. **Heather Farnsworth** seconded the motion which passed unopposed.

Proposed Action #19 (Succession plans for several long-term staff nearing retirement to be prepared within 6 months). **John Lund** moved to approve Proposed Action #19. **Katie Woods** seconded the motion which passed unopposed.

Proposed Action #8 (staff compliance with new accounting procedures), Proposed Action #9 (improved invoicing procedures), Proposed Action #18 (Commission review of need for three annual conferences) and Proposed Action #20 (yearly performance review of long and short term goals). **John Lund** moved to approve Proposed Actions 8, 9, 18 and 20. **Herm Olsen** seconded the motion which passed unopposed.

WIPFLi Wage Comparability Study

Rob Rice was happy to report that, for the most part, the review of the Bar's wages and benefits showed that Bar employee wages and benefits are in line with those offered by comparable organizations. WIPFLi developed a proposed wage structure that groups similarly valued jobs into "Grades" that have minimum, midpoint and maximum salaries for the Grade. Under the proposed wage structure, six Bar employees are slightly underpaid. Bringing those six employees up to the proposed wage structure will cost \$31,000.

John Lund moved to adopt WIPFLi wage structure with a modification for adding two types of OPC Assistant Counsels and to have the Executive Director adjust the six staff salaries to conform to the wage structure over time as the Executive Director sees fit. **Michelle Mumford** seconded the motion which passed unopposed.

3. Discussion Items

- 3.1 2017-2018 Proposed Budget.** Bar Finance Director Kellie Bartz joined the meeting to explain the proposed budget. John Lund and Kellie Bartz presented to the Commission regarding the Bar's budgeting process. Kellie explained the terms used in the spreadsheets and the methods used to track and allocate expenses and revenue. The purpose of the presentation was to familiarize the Commissioners with the budget and budgeting issues well before the budget must be approved in July. Commissioners were asked to closely review the proposed budget for discussion at the next meeting.
- 3.2 Approval of May 2017 Admittees.** The Commissioners were presented with a list of May 2017 Bar admittees. **Herm Olsen moved that the people on the list be approved for admission to the Bar. Kate Conyers seconded the motion which passed unopposed.**

The meeting adjourned at 12:00 noon

Consent Agenda

1. Approved Minutes from the March 9, 2017 Commission Meeting.

TAB
11

UTAH STATE BAR
Budget and Finance Committee
Highlights of the April 2017 Financial Statements

FINANCIAL STATEMENT HIGHLIGHTS

Notable Trends:

- Admissions income has declined compared to last year and is not anticipated to reach budgeted levels in FY17 largely due to lower than anticipated student exam fees. While not surprising, this trend is already having an impact on both Licensing fees and the New Lawyer Training Program ("NLTP"). The organization should continue to monitor this trend to determine the impact it may have on revenue in the future.
- Facilities usage by outside parties and sections has declined 43% and 24%, respectively, compared to two years ago. Actual revenue is \$45,000 below budgeted revenue, and the net loss associated with Facilities is \$21,000 more than budgeted. This trend should be taken into account during the annual budgeting process to ensure revenue targets are realistic. The reason for the decline is unclear but is perhaps worth investigating and understanding how to be more competitive with other venues, while not sacrificing availability for committee and internal usage.

Year-to-Date (YTD) Net Profit – Accrual Basis:

	Actual	Budget	Fav(unfav) \$ Variance	Fav(unfav) % Variance
YTD revenue	6,176,271	6,108,361	67,910	1%
YTD expenses	5,044,911	5,187,313	142,202	3%
YTD net profit	1,131,360	921,048	210,312	23%

YTD net profit is \$1,131,360, which is \$210,312 (23%) ahead of budget. YTD revenue is \$67,910 (1%) ahead of budget mainly due to higher than budgeted CLE revenue. YTD expenses are \$142,402 under budget mainly due to lower CLE and Member Services expenses.

YTD Net Profit –Cash Basis: Adding back year-to-date depreciation expense of \$191,001 and deducting capital expenditures of \$57,351, the cash basis year-to-date net profit is \$1,265,010 (\$133,650 higher).

Licensing: *Licensing generated net revenue of \$4,145,416 YTD.* At the end of April there were 9,423 and 2,930 active and inactive attorneys, respectively, for a total of 12,353 licensed attorneys. This number is up approximately 2.5% from last year at this time. YTD Licensing revenue is \$4,211,294, which is \$19,382 ahead of budget while Licensing expenses total \$65,877, which is \$7,902 (11%) below budget. The lower spending is largely the result of staffing efficiencies.

Admissions: *Admissions generated net profit of \$28,391 YTD.* YTD Admissions revenue is \$434,961 which is approximately \$25,366 or 6% under budget, and, \$64,674 below where it was at this time last year mainly due to lower student and attorney exam fees. Admissions expenses are \$406,570, which are just under budget. Higher admissions ceremony expenses are offset by lower staff and credit card fee expenses.

UTAH STATE BAR
Budget and Finance Committee
Highlights of the April 2017 Financial Statements

NLTP: *The New Lawyer Training Program ("NLTP") generated a net loss of \$16,473 YTD* compared to a budgeted YTD net loss of \$769. The \$15,704 unfavorable variance is mainly a result of lower NLTP fees collected this year relative to budget and a loss incurred on an NLTP Ethics training seminar.

OPC: *The OPC generated net expenditures of \$1,093,868 YTD* which is \$15,613 or 1% under budget due mainly to lower than projected staff costs.

CLE: *CLE generated a net profit of \$168,588 YTD.* Actual CLE YTD revenue is \$481,122 compared to budgeted revenue of \$391,665. CLE expenses are under budget at \$312,534 compared to budget of \$361,716. These variances are due to more CLE activity than anticipated and timing differences between when event revenue is collected and expenses are incurred. As event profits are split with sections and other entities, it is expected that CLE net profit will be lower by year-end.

Summer Convention: *The Summer Convention generated a net loss of \$16,364 YTD.* Summer Convention revenue of \$189,012 was just over the \$188,000 budget. Expenses are just under budget, but it is estimated that an additional \$6,000 in meeting, staff and overhead expenses will be incurred throughout the remainder of the fiscal year bringing the net loss for the fiscal year closer to \$22,000.

Fall Forum: *The Fall Forum generated a net loss of \$30,205 YTD.* Fall Forum revenue of \$129,261 exceeded the budget of \$124,150 mainly due to higher than budgeted registration revenue. Expenses totaled \$159,466 compared to budgeted expenses of \$149,372 due to higher food and beverage expenses.

Spring Convention: *The Spring Convention generated a net profit of \$45,866 YTD.* Spring Convention YTD revenue is \$164,213 compared to YTD budgeted revenue of \$128,000 due to more attendees than anticipated. YTD Spring Convention expenses of \$118,347 are right on budget.

Member Services: *Member Services generated a net loss of \$274,572 YTD compared to a budgeted loss of \$317,396.* Member Services revenue is \$13,468 (6%) under budget due to lower than expected Bar Journal advertising revenue. Member Services expenses are \$56,292 (11%) under budget due to lower than budgeted advertising and YLD spending.

Public Services: *Public Services generated net expenditures of \$375,066 YTD compared to a budgeted loss of \$368,561* mainly due to fewer Law Day sponsorships collected (thus far) and higher than anticipated expenses associated with Law Day. This will likely even out in May.

Bar Operations: *Bar Operations (Management, Finance, General Counsel, IT, and Commission/Special Projects) generated net expenditures of \$1,225,740 YTD* compared to budgeted YTD expenditures of \$1,240,880. This favorable variance is due to a positive variance in investment income of \$26,399. YTD spending is on track with some areas being over budget (travel, food & beverage, and convention registration for staff and Commissioners who attended the Summer Convention) and some areas being under budget (lower spending on salaries/benefits, database maintenance expenses, and outside consultants).

UTAH STATE BAR
Budget and Finance Committee
Highlights of the April 2017 Financial Statements

Facilities: *Facilities generated a net loss of \$224,615 YTD.* Revenue from facilities usage continues to decline compared to prior years and is \$44,562 or 18% below budget thus far this year due to fewer events taking place at the Law & Justice Center. Likewise, YTD expenses are \$23,565 under budget as a result of fewer events. Below is a summary of facility usage by event type for the first ten months of this year compared to the same period the last two years:

Event Type	YTD through April 30th		
	FY17	FY16	FY15
Outside groups:			
Commercial	24	39	9
Educational	37	74	79
Governmental/regulatory	13	36	93
NFP	229	271	353
Other	-	-	-
Total outside groups	303	420	534
CLE events	80	71	69
Section events	147	148	193
MCLE	3	3	1
Total excluding internal/committees	533	642	797
<i>Decline compared to prior year</i>	-17%	-1%	
Committees/internal events	572	588	544
Total events	1,105	1,230	1,341
<i>Decline compared to prior year</i>	-10%	-8%	27%

ADDITIONAL COMMENTS

Board Designated Reserves: In consultation with Bar management and the Budget and Finance Committee, the Commission targeted the following reserve amounts:

Operations Reserve (6 months' operations)	\$3,100,000
Capital Replacement Reserve (equipment)	200,000
Capital Replacement Reserve (building)	<u>650,000</u>
Total	<u>\$3,950,000</u>
Estimated cash reserve at April 30, 2017	<u>\$4,000,000</u>

Utah State Bar Income Statement April 30, 2017

Revenue		Actual LYTD	Actual YTD	Budget YTD	Fav (Unfav) variance	% of Budget	Total Budget	YTD % of Tot Budget
Licensing	4,187,941	4,211,294	4,191,912	19,382		100%	4,219,089	100%
Admissions	499,635	434,961	460,327	(25,366)		94%	478,106	91%
NLTP	66,900	56,443	71,260	(14,817)		79%	85,000	66%
OPC	6,433	7,776	4,885	2,891		159%	12,000	65%
CLE	394,449	481,122	391,665	89,457		123%	566,000	85%
Summer Convention	198,521	189,012	188,000	1,012		101%	188,000	101%
Fall Forum	120,396	129,261	124,150	5,111		104%	124,150	104%
Spring Convention	133,302	164,213	128,000	36,213		128%	128,000	128%
Member Services	212,523	205,382	218,850	(13,468)		94%	241,027	85%
Public Services	18,542	11,420	18,074	(6,654)		63%	21,747	53%
Bar Operations	61,241	76,220	57,509	18,711		133%	63,535	120%
Facilities	225,598	209,167	253,729	(44,562)		82%	308,442	68%
Total Revenue	6,125,481	6,176,271	6,108,361	67,910		101%	6,435,096	96%
Expenses								
Licensing	65,707	65,877	73,779	7,902		89%	110,732	59%
Admissions	400,281	406,570	411,857	5,287		99%	481,145	85%
NLTP	68,484	72,916	72,029	(887)		101%	87,053	84%
OPC	1,060,957	1,101,644	1,114,366	12,722		99%	1,336,238	82%
CLE	385,729	312,534	361,716	49,182		86%	513,282	61%
Summer Convention	219,486	205,376	207,180	1,804		99%	212,766	97%
Fall Forum	142,439	159,466	149,372	(10,094)		107%	150,462	106%
Spring Convention	96,243	118,347	118,397	50		100%	118,917	100%
Member Services	472,152	479,954	536,246	56,292		90%	692,407	69%
Public Services	371,893	386,486	386,635	149		100%	463,948	83%
Bar Operations	1,193,126	1,301,960	1,298,389	(3,571)		100%	1,570,151	83%
Facilities	437,799	433,782	457,347	23,565		95%	560,681	77%
Total Expenses	4,914,295	5,044,911	5,187,313	142,402		97%	6,297,782	80%
Net Profit (Loss)	\$ 1,211,186	\$ 1,131,360	\$ 921,048	\$ 210,312		123%	\$ 137,314	824%
Depreciation	185,902	191,001	197,978	6,977		96%	242,215	
Cash increase (decrease) from operations	1,397,087	1,322,361	1,119,026	203,335		118%	379,529	
Changes in operating assets/liabilities	(2,347,412)	(2,273,626)	(2,273,626)	-		100%	20,000	
Capital expenditures	(42,639)	(57,351)	(153,333)	95,983		37%	(184,000)	
Net change in cash	\$ (992,964)	\$ (1,008,615)	\$ (1,307,933)	\$ 299,318		77%	\$ 215,529	-468%

Utah State Bar Licensing

April 30, 2017

	Actual LYTD	Actual YTD	Budget YTD	Fav (Unfav) variance	% of Budget	Total Budget	YTD % of Tot Budget
Revenue							
4010 · Section/Local Bar Support fees	19,878	16,800	19,995	(3,195)	84%	20,367	82%
4021 · Lic Fees > 3 Years	3,402,265	3,463,425	3,454,303	9,122	100%	3,456,892	100%
4022 · Lic Fees < 3 Years	280,710	245,220	262,649	(17,429)	93%	265,924	92%
4023 · Lic Fees - House Counsel	23,970	28,885	22,715	6,170	127%	22,715	127%
4025 · Pro Hac Vice Fees	61,250	55,000	58,338	(3,338)	94%	71,910	76%
4026 · Lic Fees - Inactive/FS	106,550	111,200	107,058	4,142	104%	107,661	103%
4027 · Lic Fees - Inactive/NS	197,600	207,915	198,673	9,242	105%	200,578	104%
4029 · Prior Year Lic Fees	1,165	3,686	2,096	1,590	176%	2,096	176%
4030 · Certs of Good Standing	19,620	20,000	19,920	80	100%	23,950	84%
4095 · Miscellaneous Income	1,513	1,462	1,773	(311)	82%	1,996	73%
4096 · Late Fees	73,420	57,700	44,392	13,308	130%	45,000	128%
Total Revenue	4,187,941	4,211,294	4,191,912	19,382	100%	4,219,089	100%
Expenses							
Program Services	-	418	-	(418)	-	-	-
Salaries & Benefits	41,639	34,713	45,491	10,778	76%	61,955	56%
General & Administrative	19,236	25,820	23,205	(2,615)	111%	42,616	61%
Building Overhead	4,832	4,926	5,083	157	97%	6,161	80%
Total Expenses	65,707	65,877	73,779	7,902	89%	110,732	59%
Net Profit (Loss)	\$ 4,122,234	\$ 4,145,416	\$ 4,118,133	\$ 27,283	101%	\$ 4,108,357	101%

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Utah State Bar Admissions April 30, 2017

Revenue
 4001 · Admissions - Student Exam Fees
 4002 · Admissions - Attorney Exam Fees
 4003 · Admissions - Retake Fees
 4004 · Admissions - Laptop Fees
 4005 · Admissions - Application Forms
 4006 · Transfer App Fees
 4008 · Attorney - Motion
 4009 · House Counsel
 4095 · Miscellaneous Income
 4096 · Late Fees
 Total Revenue

Expenses
 Program Services
 Salaries & Benefits
 General & Administrative
 Building Overhead
 Total Expenses

Actual LYTD	Actual YTD	Budget YTD	Fav (Unfav) variance	% of Budget	Total Budget	YTD % of Tot Budget
165,575	142,525	168,586	(26,061)	85%	164,640	87%
71,495	59,900	63,705	(3,805)	94%	67,492	89%
54,400	49,250	41,846	7,404	118%	48,000	103%
70,650	63,600	67,701	(4,101)	94%	70,000	91%
-	-	-	-	-	-	-
19,000	1,750	900	850	194%	1,000	175%
59,200	66,800	68,745	(1,945)	97%	76,002	88%
14,450	17,850	13,152	4,698	136%	14,700	121%
1,315	1,286	773	513	166%	1,273	101%
43,550	32,000	34,919	(2,919)	92%	34,999	91%
499,635	434,961	460,327	(25,366)	94%	478,106	105%
117,254	124,843	120,544	(4,299)	104%	129,284	97%
241,510	243,336	249,699	6,363	97%	303,468	80%
33,278	29,991	32,942	2,951	91%	37,893	79%
8,239	8,400	8,672	272	97%	10,500	80%
400,281	406,570	411,857	5,287	99%	481,145	85%
\$ 99,354	\$ 28,391	\$ 48,470	\$ (20,079)	59%	\$ (3,039)	-934%

Net Profit (Loss)

Utah State Bar NLTP

April 30, 2017

Revenue		Actual LYTD	Actual YTD	Budget YTD	Fav (Unfav) variance	% of Budget	Total Budget	YTD % of Tot Budget
4020 · NLTP Fees		66,900	58,800	71,260	(12,460)	83%	85,000	69%
4095 · Miscellaneous Income		-	-	-	-	-	-	-
4096 · Late Fees		-	-	-	-	-	-	-
4200 · Seminar Profit/Loss		-	(2,357)	-	(2,357)	-	-	-
Total Revenue		66,900	56,443	71,260	(14,817)	79%	85,000	66%
Expenses								
Program Services		5,857	5,973	5,928	(45)	101%	6,800	88%
Salaries & Benefits		53,665	56,560	56,682	122	100%	68,629	82%
General & Administrative		3,921	5,243	4,113	(1,130)	127%	5,198	101%
Building Overhead		5,041	5,139	5,306	167	97%	6,426	80%
Total Expenses		68,484	72,916	72,029	(887)	101%	87,053	84%
Net Profit (Loss)		\$ (1,584)	\$ (16,473)	\$ (769)	\$ (15,704)	2143%	\$ (2,053)	802%

Utah State Bar OPC

April 30, 2017

		Actual LYTD	Actual YTD	Budget YTD	Fav (Unfav) variance	% of Budget	Total Budget	YTD % of Tot Budget
Revenue								
	4095 · Miscellaneous Income	2,732	2,080	1,717	363	121%	2,000	104%
	4200 · Seminar Profit/Loss	3,701	5,696	3,168	2,528	-	10,000	57%
	Total Revenue	6,433	7,776	4,885	2,891	159%	12,000	65%
Expenses								
	Program Services	19,684	24,031	17,969	(6,062)	134%	23,196	104%
	Salaries & Benefits	896,778	929,172	946,582	17,410	98%	1,134,901	82%
	General & Administrative	72,080	74,615	73,620	(995)	101%	85,852	87%
	Building Overhead	72,415	73,826	76,195	2,369	97%	92,289	80%
	Total Expenses	1,060,957	1,101,644	1,114,366	12,722	99%	1,336,238	82%
Net Profit (Loss)		\$ (1,054,524)	\$ (1,093,868)	\$ (1,109,481)	\$ 15,613	99%	\$ (1,324,238)	83%

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Utah State Bar CLE

April 30, 2017

		Actual LYTD	Actual YTD	Budget YTD	Fav (Unfav) variance	% of Budget	Total Budget	YTD % of Tot Budget
Revenue								
4051 · Meeting - Registration	-	-	-	-	-	-	-	-
4052 · Meeting - Sponsor Revenue	24,300	16,750	7,883	8,867	212%	14,000	120%	120%
4053 · Meeting - Vendor Revenue	-	-	-	-	-	-	-	-
4054 · Meeting - Material Sales	15	-	-	-	-	-	-	-
4055 · Meeting - Sp Ev Registration	-	-	-	-	-	-	-	-
4081 · CLE - Registrations	316,389	355,819	305,881	49,938	116%	450,000	79%	79%
4082 · CLE - Video Library Sales	49,095	89,623	70,612	19,011	127%	100,000	90%	90%
4083 · CLE - Material Sales	-	-	-	-	-	-	-	-
4084 · Business Law Book Sales	11,205	10,026	10,484	(458)	96%	12,000	84%	84%
4095 · Miscellaneous Income	-	9,050	-	9,050	-	-	-	-
4200 · Seminar Profit/Loss	(6,555)	(146)	(3,195)	3,049	5%	(10,000)	1%	1%
Total Revenue	394,449	481,122	391,665	89,457	123%	566,000	85%	85%
Expenses								
Program Services	217,579	155,804	180,436	24,632	86%	290,811	54%	54%
Salaries & Benefits	98,523	97,032	104,616	7,584	93%	127,014	76%	76%
General & Administrative	50,569	39,838	57,481	17,643	69%	71,336	56%	56%
Building Overhead	19,059	19,860	19,183	(677)	104%	24,121	82%	82%
Total Expenses	385,729	312,534	361,716	49,182	86%	513,282	61%	61%
Net Profit (Loss)	\$ 8,720	\$ 168,588	\$ 29,949	\$ 138,640	563%	\$ 52,718	320%	320%

Utah State Bar Summer Convention April 30, 2017

	Actual LYTD	Actual YTD	Budget YTD	Fav (Unfav) variance	% of Budget	Total Budget	YTD % of Tot Budget
Revenue							
4051 · Meeting - Registration	165,070	156,612	156,000	612	100%	156,000	100%
4052 · Meeting - Sponsor Revenue	18,650	20,000	18,000	2,000	111%	18,000	111%
4053 · Meeting - Vendor Revenue	11,500	10,600	11,000	(400)	96%	11,000	96%
4054 · Meeting - Material Sales	-	-	-	-	-	-	-
4055 · Meeting - Sp Ev Registration	3,301	1,800	3,000	(1,200)	60%	3,000	60%
4095 · Miscellaneous Income	-	-	-	-	-	-	-
Total Revenue	198,521	189,012	188,000	1,012	101%	188,000	101%
Expenses							
Program Services	175,485	169,341	164,042	(5,299)	103%	164,200	103%
Salaries & Benefits	30,097	19,400	27,603	8,203	70%	32,398	60%
General & Administrative	11,888	14,579	13,414	(1,165)	109%	13,599	107%
Building Overhead	2,016	2,056	2,121	65	97%	2,569	80%
Total Expenses	219,486	205,376	207,180	1,804	99%	212,766	97%
Net Profit (Loss)	\$ (20,965)	\$ (16,364)	\$ (19,180)	\$ 2,816	85%	\$ (24,766)	66%

Utah State Bar Fall Forum April 30, 2017

Revenue
 4051 · Meeting - Registration
 4052 · Meeting - Sponsor Revenue
 4053 · Meeting - Vendor Revenue
 4054 · Meeting - Material Sales
 4055 · Meeting - Sp Ev Registration
 4095 · Miscellaneous Income
 Total Revenue

Expenses
 Program Services
 Salaries & Benefits
 General & Administrative
 Building Overhead
 Total Expenses

Actual LYTD	Actual YTD	Budget YTD	Fav (Unfav) variance	% of Budget	Total Budget	YTD % of Tot Budget
95,646	106,861	89,700	17,161	119%	89,700	119%
15,000	10,000	20,000	(10,000)	50%	20,000	50%
9,600	12,025	14,450	(2,425)	83%	14,450	83%
-	-	-	-	-	-	-
150	375	-	375	-	-	-
-	-	-	-	-	-	-
120,396	129,261	124,150	5,111	104%	124,150	104%
114,042	132,053	112,500	(19,553)	117%	112,500	117%
10,871	12,624	12,464	(160)	101%	13,106	96%
15,509	12,733	22,286	9,553	57%	22,286	57%
2,016	2,056	2,122	66	97%	2,570	80%
142,439	159,466	149,372	(10,094)	107%	150,462	106%
\$ (22,043)	\$ (30,205)	\$ (25,222)	\$ (4,983)	120%	\$ (26,312)	115%

Net Profit (Loss)

Utah State Bar Spring Convention April 30, 2017

Revenue

4051 · Meeting - Registration
4052 · Meeting - Sponsor Revenue
4053 · Meeting - Vendor Revenue
4054 · Meeting - Material Sales
4055 · Meeting - Sp Ev Registration
4095 · Miscellaneous Income
Total Revenue

Expenses

Program Services
Salaries & Benefits
General & Administrative
Building Overhead
Total Expenses

Actual LYTD	Actual YTD	Budget YTD	Fav (Unfav) variance	% of Budget	Total Budget	YTD % of Tot Budget
105,085	131,352	102,000	29,352	129%	102,000	129%
14,850	17,650	14,000	3,650	126%	14,000	126%
10,450	12,000	10,000	2,000	120%	10,000	120%
-	-	-	-	-	-	-
2,917	3,211	2,000	1,211	161%	2,000	161%
-	-	-	-	-	-	-
133,302	164,213	128,000	36,213	128%	128,000	128%
70,517	83,689	91,021	7,332	92%	91,021	92%
15,439	21,524	16,534	(4,990)	130%	16,556	130%
8,271	11,079	8,720	(2,359)	127%	8,770	126%
2,016	2,056	2,122	66	97%	2,570	80%
96,243	118,347	118,397	50	100%	118,917	100%
\$ 37,059	\$ 45,866	\$ 9,603	\$ 36,263	478%	\$ 9,083	505%
Net Profit (Loss)						

Utah State Bar
Member Services
(Bar Journal, Member Benefits, Section Support, Legislative, Public Education & YLD)
April 30, 2017

Revenue		Actual LYTD	Actual YTD	Budget YTD	Fav (Unfav) variance	% of Budget	Total Budget	YTD % of Tot Budget
4010 · Section/Local Bar Support fees		81,739	80,997	84,600	(3,603)	96%	85,000	95%
4052 · Meeting - Sponsor Revenue		-	1,000	-	1,000	-	1,000	100%
4061 · Advertising Revenue		121,692	114,618	124,572	(9,954)	92%	145,000	79%
4062 · Subscriptions		150	60	150	(90)	40%	150	40%
4071 · Mem Benefits - Lexis		2,715	833	3,438	(2,605)	24%	3,438	24%
4072 · Royalty Inc - Bar J, MBNA, LM,M		6,017	6,734	6,090	644	111%	6,439	105%
4081 · CLE - Registrations		210	-	-	-	-	-	-
4093 · Law Day Revenue		-	1,140	-	1,140	-	-	-
4095 · Miscellaneous Income		-	-	-	-	-	-	-
4200 · Seminar Profit/Loss		-	-	-	-	-	-	-
Total Revenue		212,523	205,382	218,850	(13,468)	94%	241,027	85%
Expenses								
Program Services		195,317	207,364	230,854	23,490	90%	284,502	73%
Salaries & Benefits		153,948	158,120	159,707	1,587	99%	193,837	82%
General & Administrative		105,497	96,310	128,181	31,871	75%	191,988	50%
Building Overhead		17,390	18,159	17,504	(655)	104%	22,080	82%
Total Expenses		472,152	479,954	536,246	56,292	90%	692,407	69%
Net Profit (Loss)		\$ (259,629)	\$ (274,572)	\$ (317,396)	\$ 42,824	87%	\$ (451,380)	61%

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Utah State Bar
Public Services
(Committees, Consumer Assistance, Access to Justice, Tuesday Night Bar)
April 30, 2017

Revenue		Actual LYTD	Actual YTD	Budget YTD	Fav (Unfav) variance	% of Budget	Total Budget	YTD % of Tot Budget
4010 · Section/Local Bar Support fees		-	-	-	-	-	-	-
4063 · Modest Means revenue		13,520	10,325	13,565	(3,240)	76%	16,000	65%
4093 · Law Day Revenue		5,012	1,085	4,507	(3,422)	24%	5,737	19%
4095 · Miscellaneous Income		10	10	2	8	500%	10	100%
4200 · Seminar Profit/Loss		-	-	-	-	-	-	-
Total Revenue		18,542	11,420	18,074	(6,654)	63%	21,747	53%
Expenses								
Program Services		115,924	123,927	125,721	1,794	99%	143,189	87%
Salaries & Benefits		209,779	212,780	223,339	10,559	95%	270,119	79%
General & Administrative		30,093	33,369	20,634	(12,735)	162%	30,127	111%
Building Overhead		16,096	16,410	16,941	531	97%	20,513	80%
Total Expenses		371,893	386,486	386,635	149	100%	463,948	83%
Net Profit (Loss)		\$ (353,351)	\$ (375,066)	\$ (368,561)	\$ (6,505)	102%	\$ (442,201)	85%

Utah State Bar
Bar Operations
(Bar Management, General Counsel, IT, Commission/Special Projects)
April 30, 2017

Revenue		Actual LYTD	Actual YTD	Budget YTD	Fav (Unfav) variance	% of Budget	Total Budget	YTD % of Tot Budget
4031 · Enhanced Web Revenue		-	-	-	-	-	-	-
4052 · Meeting - Sponsor Revenue		-	-	1,989	(1,989)	0%	2,652	0%
4060 · E-Filing Revenue		20,609	12,952	20,000	(7,048)	65%	20,000	65%
4103 · In - Kind Revenue - UDR		707	1,050	642	408	164%	825	127%
4095 · Miscellaneous Income		708	1,300	358	942	363%	898	145%
Investment Income		39,216	60,919	34,520	26,399	176%	39,160	100%
Total Revenue		61,241	76,220	57,509	18,711	133%	63,535	96%
Expenses								
Program Services		175,923	242,446	186,517	(55,929)	130%	218,451	111%
Salaries & Benefits		796,103	842,840	892,388	49,548	94%	1,089,568	77%
General & Administrative		176,158	172,624	174,878	2,254	99%	208,338	83%
In Kind		4,302	2,619	1,846	(773)	142%	2,001	131%
Building Overhead		40,640	41,432	42,760	1,328	97%	51,793	80%
Total Expenses		1,193,126	1,301,960	1,298,389	(3,571)	100%	1,570,151	83%
Net Profit (Loss)		\$ (1,131,885)	\$ (1,225,740)	\$ (1,240,880)	\$ 15,140	99%	\$ (1,506,616)	81%

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Utah State Bar Facilities

April 30, 2017

	Actual LYTD	Actual YTD	Budget YTD	Fav (Unfav) variance	% of Budget	Total Budget	YTD % of Tot Budget
Revenue							
4039 · Room Rental-All parties	100,130	92,817	107,228	(14,411)	87%	131,599	71%
4042 · Food & Beverage Rev-All Parties	106,193	96,002	124,794	(28,792)	77%	150,906	64%
4043 · Setup & A/V charges-All parties	2,975	1,972	3,946	(1,974)	50%	4,230	47%
4090 · Tenant Rent	16,254	18,060	17,730	330	102%	21,670	83%
4095 · Miscellaneous Income	46	317	31	286	1021%	37	856%
Total Revenue	225,598	209,167	253,729	(44,562)	82%	308,442	68%
Expenses							
Program Services	102,094	91,705	120,903	29,198	76%	149,428	61%
Salaries & Benefits	109,712	122,926	111,290	(11,636)	110%	138,976	88%
General & Administrative	16,803	10,709	5,919	(4,790)	181%	6,494	165%
In Kind	21,382	16,401	22,683	6,282	72%	26,532	62%
Building Overhead	187,809	192,041	196,552	4,511	98%	239,251	80%
Total Expenses	437,799	433,782	457,347	23,565	95%	560,681	77%
Net Profit (Loss)	\$ (212,201)	\$ (224,615)	\$ (203,618)	\$ (20,997)	110%	\$ (252,239)	89%

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Utah State Bar
Income Statement - Consolidated By Account
April 30, 2017

	Actual LYTD	Actual YTD	Budget YTD	Fav (Unfav) variance	% of Budget	Total Budget	YTD % of Tot Budget
Revenue							
4001 · Admissions - Student Exam Fees	165,575	142,525	168,586	(26,061)	85%	164,640	87%
4002 · Admissions - Attorney Exam Fees	71,495	59,900	63,705	(3,805)	94%	67,492	89%
4003 · Admissions - Retake Fees	54,400	49,250	41,846	7,404	118%	48,000	103%
4004 · Admissions - Laptop Fees	70,650	63,600	67,701	(4,101)	94%	70,000	91%
4005 · Admissions - Application Forms	-	-	-	-	-	-	-
4006 · Transfer App Fees	19,000	1,750	900	850	194%	1,000	175%
4008 · Attorney - Motion	59,200	66,800	68,745	(1,945)	97%	76,002	88%
4009 · House Counsel	14,450	17,850	13,152	4,698	136%	14,700	121%
4010 · Section/Local Bar Support fees	101,617	97,797	104,595	(6,798)	94%	105,367	93%
4020 · NLTP Fees	66,900	58,800	71,260	(12,460)	83%	85,000	69%
4021 · Lic Fees > 3 Years	3,402,265	3,463,425	3,454,303	9,122	100%	3,456,892	100%
4022 · Lic Fees < 3 Years	280,710	245,220	262,649	(17,429)	93%	265,924	92%
4023 · Lic Fees - House Counsel	23,970	28,885	22,715	6,170	127%	22,715	127%
4025 · Pro Hac Vice Fees	61,250	55,000	58,338	(3,338)	94%	71,910	76%
4026 · Lic Fees - Inactive/FS	106,550	111,200	107,058	4,142	104%	107,661	103%
4027 · Lic Fees - Inactive/NS	197,600	207,915	198,673	9,242	105%	200,578	104%
4029 · Prior Year Lic Fees	1,165	3,686	2,096	1,590	176%	2,096	176%
4030 · Certs of Good Standing	19,620	20,000	19,920	80	100%	23,950	84%
4031 · Enhanced Web Revenue	-	-	-	-	-	-	-
4039 · Room Rental-All parties	100,130	92,817	107,228	(14,411)	87%	131,599	71%
4042 · Food & Beverage Rev-All Parties	106,193	96,002	124,794	(28,792)	77%	150,906	64%
4043 · Setup & A/V charges-All parties	2,975	1,972	3,946	(1,974)	50%	4,230	47%
4051 · Meeting - Registration	365,801	394,825	347,700	47,125	114%	347,700	114%
4052 · Meeting - Sponsor Revenue	72,800	65,400	61,872	3,528	106%	69,652	94%
4053 · Meeting - Vendor Revenue	31,550	34,625	35,450	(825)	98%	35,450	98%
4054 · Meeting - Material Sales	15	-	-	-	-	-	-
4055 · Meeting - Sp Ev Registration	6,368	5,386	5,000	386	108%	5,000	108%
4060 · E-Filing Revenue	20,609	12,952	20,000	(7,048)	65%	20,000	65%
4061 · Advertising Revenue	121,692	114,618	124,572	(9,954)	92%	145,000	79%
4062 · Subscriptions	150	60	150	(90)	40%	150	40%
4063 · Modest Means revenue	13,520	10,325	13,565	(3,240)	76%	16,000	65%
4071 · Mem Benefits - Lexis	2,715	833	3,438	(2,605)	24%	3,438	24%
4072 · Royalty Inc - Bar J, MBNA, LM,M	6,017	6,734	6,090	644	111%	6,439	105%
4081 · CLE - Registrations	316,599	355,819	305,881	49,938	116%	450,000	79%
4082 · CLE - Video Library Sales	49,095	89,623	70,612	19,011	127%	100,000	90%
4083 · CLE - Material Sales	-	-	-	-	-	-	-
4084 · Business Law Book Sales	11,205	10,026	10,484	(458)	96%	12,000	84%
4090 · Tenant Rent	16,254	18,060	17,730	330	102%	21,670	83%
4093 · Law Day Revenue	5,012	2,225	4,507	(2,282)	49%	5,737	39%
4095 · Miscellaneous Income	6,324	15,505	4,654	10,851	333%	6,214	250%
4096 · Late Fees	116,970	89,700	79,311	10,389	113%	79,999	112%
4103 · In - Kind Revenue - UDR	707	1,050	642	408	164%	825	127%
4200 · Seminar Profit/Loss	(2,853)	3,192	(27)	3,219	-11822%	-	-
Investment income	39,216	60,919	34,520	26,399	176%	39,160	156%
Total Revenue	6,125,481	6,176,271	6,108,361	67,910	101%	6,435,096	96%
Program Service Expenses							
5001 · Meeting Facility-external only	52,710	36,948	46,072	9,124	80%	56,419	65%
5002 · Meeting facility-internal only	56,720	55,869	53,647	(2,222)	104%	67,568	83%
5013 · ExamSoft	22,095	23,145	22,000	(1,145)	105%	22,000	105%
5014 · Questions	50,085	48,085	52,000	3,915	92%	52,000	92%
5015 · Investigations	50	225	865	640	26%	1,704	13%
5016 · Credit Checks	1,819	1,781	1,746	(35)	102%	2,500	71%
5017 · Medical Exam	183	2,560	800	(1,760)	320%	800	320%
5025 · Temp Labor/Proctors	6,100	6,600	6,000	(600)	110%	6,000	110%
5030 · Speaker Fees & Expenses	39,503	45,647	88,711	43,064	51%	93,962	49%
5031 · Speaker Reimb. - Receipt Req'd	10,229	6,662	6,048	(614)	110%	9,168	73%
5035 · Awards	1,340	3,041	1,249	(1,792)	243%	3,128	97%
5037 · Grants/ contributions - general	18,621	5,250	19,789	14,539	27%	20,964	25%
5040 · Witness & Hearing Expense	2,423	9,349	482	(8,867)	1940%	1,749	535%

Utah State Bar
Income Statement - Consolidated By Account
April 30, 2017

	Actual LYTD	Actual YTD	Budget YTD	Fav (Unfav) variance	% of Budget	Total Budget	YTD % of Tot Budget
5041 · Process Serving	2,323	1,307	1,171	(136)	112%	1,200	109%
5042 · Operations Audit	-	28,500	30,000	1,500	95%	30,000	95%
5045 · Bar Anniversary	5,000	6	-	(6)	-	-	-
5046 · Court Reporting	325	567	400	(167)	142%	400	142%
5047 · Casemaker	63,968	57,009	59,006	1,997	97%	71,000	80%
5055 · Legislative Expense	10,600	37,222	35,000	(2,222)	106%	42,000	89%
5060 · Program Special Activities	6,522	325	9,423	9,098	3%	9,448	3%
5061 · LRE - Bar Support	65,000	65,000	65,000	-	100%	65,000	100%
5062 · Law Day	(581)	8,146	1,495	(6,651)	545%	12,353	66%
5063 · Special Event Expense	8,640	28,137	13,990	(14,147)	201%	14,000	201%
5064 · MCLE Fees Paid	25,750	27,130	22,043	(5,087)	123%	32,900	82%
5070 · Equipment Rental	37,608	57,932	39,330	(18,602)	147%	43,424	133%
5075 · Food & Bev-external costs only	413,547	369,418	346,862	(22,556)	107%	432,542	85%
5076 · Food & beverage - internal only	56,907	55,600	54,500	(1,100)	102%	67,993	82%
5079 · Soft Drinks	10,344	8,457	10,782	2,325	78%	13,473	63%
5085 · Misc. Program Expense	8,754	6,587	7,246	659	91%	10,211	65%
5090 · Commission Expense	21,738	21,621	22,669	1,048	95%	25,000	86%
5095 · Wills for Heroes	-	-	2,000	2,000	0%	2,500	0%
5096 · UDR Support	-	10,000	10,000	-	100%	10,000	100%
5099 · Blomquist Hale	61,646	61,631	62,505	874	99%	75,000	82%
5702 · Travel - Lodging	33,383	39,573	37,720	(1,853)	105%	39,534	100%
5703 · Travel - Transportation/Parking	9,539	17,088	14,496	(2,592)	118%	19,153	89%
5704 · Travel - Mileage Reimbursement	12,981	7,951	11,438	3,487	70%	12,330	64%
5705 · Travel - Per Diems	5,359	3,907	6,238	2,331	63%	7,134	55%
5706 · Travel - Meals	217	625	424	(201)	147%	550	114%
5707 · Travel - Commission Mtgs	35,774	42,883	35,736	(7,147)	120%	36,736	117%
5805 · ABA Annual Meeting	6,639	5,158	4,804	(354)	107%	12,599	41%
5810 · ABA Mid Year Meeting	12,076	9,442	13,918	4,476	68%	14,051	67%
5815 · Commission/Education	8,841	22,840	9,900	(12,940)	231%	9,900	231%
5820 · ABA Annual Delegate	6,856	12,421	8,833	(3,588)	141%	11,004	113%
5830 · Western States Bar Conference	7,460	22,038	10,000	(12,038)	220%	10,000	220%
5840 · President's Expense	17,785	15,496	15,000	(496)	103%	18,000	86%
5841 · President's Reimbursement	5,312	306	3,003	2,697	10%	5,000	6%
5850 · Leadership Academy	5,763	9,297	17,000	7,703	55%	20,000	46%
5855 · Bar Review	1,765	330	6,000	5,670	5%	8,000	4%
5865 · Retreat	29,840	21,388	15,000	(6,388)	143%	15,000	143%
5960 · Overhead Allocation - Seminars	(0)	-	6,050	6,050	0%	1,261	0%
5970 · Event Revenue Sharing - 3rd Pty	50,115	41,096	48,044	6,948	86%	76,724	54%
Total Program Service Expenses	1,309,674	1,361,594	1,356,435	(5,159)	100%	1,613,382	84%
Salaries & Benefit Expenses							
5510 · Salaries/Wages	2,076,787	2,119,613	2,189,308	69,695	97%	2,662,648	80%
5605 · Payroll Taxes	152,788	157,077	163,041	5,964	96%	196,265	80%
5610 · Health Insurance	189,916	202,427	207,176	4,749	98%	250,653	81%
5630 · Dental Insurance	11,877	13,181	12,902	(279)	102%	15,958	83%
5640 · Life & LTD Insurance	14,840	14,378	17,910	3,532	80%	18,013	80%
5645 · Workman's Comp Insurance	3,404	2,829	3,180	351	89%	3,292	86%
5650 · Retirement Plan Contributions	181,939	199,377	220,541	21,164	90%	265,165	75%
5655 · Retirement Plan Fees & Costs	17,164	16,524	18,763	2,239	88%	24,832	67%
5660 · Training/Development	9,349	25,622	13,574	(12,048)	189%	13,701	187%
66000 · Payroll Expenses	0	0	-	(0)	-	-	-
Total Salaries & Benefit Expenses	2,658,064	2,751,028	2,846,395	95,367	97%	3,450,527	77%
General & Administrative Expenses							
7025 · Office Supplies	21,900	20,486	23,560	3,074	87%	26,706	77%
7033 · Operating Meeting Supplies	17,761	18,106	17,574	(532)	103%	22,001	82%
7035 · Postage/Mailing, net	69,224	44,775	58,677	13,902	76%	69,842	64%
7040 · Copy/Printing Expense	154,723	134,279	145,079	10,800	93%	177,481	76%
7040 · Copy/Printing Expense - Other	-	-	-	-	-	-	-
7041 · Copy/Print revenue	(22,300)	(20,706)	(22,636)	(1,930)	91%	(28,046)	74%
4094 · Copy/Print revenue	-	-	-	-	-	-	-

Utah State Bar
Income Statement - Consolidated By Account
April 30, 2017

	Actual LYTD	Actual YTD	Budget YTD	Fav (Unfav) variance	% of Budget	Total Budget	YTD % of Tot Budget
7045 · Internet Service	4,714	13,306	14,630	1,324	91%	16,055	83%
7050 · Computer Maintenance	9,752	23,551	25,026	1,475	94%	35,637	66%
7055 · Computer Supplies & Small Equip	11,554	5,854	19,929	14,075	29%	23,310	25%
7089 · Membership Database Fees	28,676	32,177	35,495	3,318	91%	41,965	77%
7095 · Fax Equip & Supplies	970	-	-	-	-	-	-
7100 · Telephone	31,673	48,717	27,204	(21,513)	179%	35,950	136%
7105 · Advertising	1,038	3,310	16,400	13,090	20%	58,550	6%
7106 · Public Notification	1,534	642	1,122	480	57%	1,500	43%
7110 · Publications/Subscriptions	10,924	13,813	10,911	(2,902)	127%	13,596	102%
7115 · Public Relations	991	2,368	10,189	7,821	23%	12,689	19%
7120 · Membership/Dues	10,975	9,822	10,466	644	94%	11,623	85%
7135 · Bank Service Charges	1,794	1,164	1,713	549	68%	2,200	53%
7136 · ILM Service Charges	11,783	13,098	11,614	(1,484)	113%	13,498	97%
7138 · Bad debt expense	-	-	-	-	-	500	0%
7140 · Credit Card Merchant Fees	56,599	31,871	51,052	19,181	62%	91,040	35%
7140 · Credit Card Merchant Fees - Other	-	19,691	-	(19,691)	-	-	-
7141 · Credit Card surcharge	(24,177)	(18,162)	(21,424)	(3,262)	85%	(50,788)	36%
7145 · Commission Election Expense	1,625	1,625	813	(812)	-	1,626	100%
7150 · E&O/Off & Dir Insurance	33,199	40,997	39,246	(1,751)	104%	46,232	89%
7160 · Audit Expense	30,504	29,539	30,400	861	97%	30,400	97%
7170 · Lobbying Rebates	738	7	991	984	1%	1,000	1%
7175 · O/S Consultants	50,923	23,023	28,796	5,773	80%	28,796	80%
7176 · Bar Litigation	11,382	11,344	8,888	(2,456)	128%	14,999	76%
7177 · UPL	118	7,745	212	(7,533)	3653%	5,002	155%
7178 · Offsite Storage/Backup	3,031	3,302	2,877	(425)	115%	3,501	94%
7179 · Payroll Adm Fees	2,334	2,336	2,494	158	94%	3,001	78%
7180 · Administrative Fee Expense	1,225	732	1,441	709	51%	1,700	43%
7190 · Lease Interest Expense	647	185	1,698	1,513	-	1,698	11%
7191 · Lease Sales Tax Expense	212	324	102	(222)	317%	283	114%
7195 · Other Gen & Adm Expense	7,258	7,590	10,854	3,264	70%	10,950	69%
Total General & Administrative Expenses	543,304	526,910	565,393	38,483	93%	724,497	75%
In Kind Expenses							
7103 · InKind Contrib-UDR & all other	25,683	19,020	24,529	5,509	78%	28,533	67%
Total In Kind Expenses	25,683	19,020	24,529	5,509	78%	28,533	90%
Building Overhead Expenses							
6015 · Janitorial Expense	24,516	25,209	26,184	975	96%	31,603	80%
6020 · Heat	15,350	15,027	16,934	1,907	89%	19,205	78%
6025 · Electricity	38,894	39,124	41,078	1,954	95%	50,297	78%
6030 · Water/Sewer	3,705	4,336	4,163	(173)	104%	4,854	89%
6035 · Outside Maintenance	10,665	10,366	9,956	(410)	104%	11,887	87%
6040 · Building Repairs	11,902	23,501	11,344	(12,157)	207%	13,659	172%
6045 · Bldg Mtncn Contracts	34,553	30,272	37,614	7,342	80%	44,281	68%
6050 · Bldg Mtncn Supplies	1,509	2,191	1,324	(867)	165%	1,987	110%
6055 · Real Property Taxes	29,322	31,297	28,160	(3,137)	111%	37,064	84%
6060 · Personal Property Taxes	600	642	630	(12)	102%	753	85%
6065 · Bldg Insurance/Fees	20,651	13,392	19,196	5,804	70%	23,038	58%
6070 · Building & Improvements Depre	43,840	43,754	48,046	4,292	91%	57,656	76%
6075 · Furniture & Fixtures Depre	12,835	12,758	13,989	1,231	91%	16,793	76%
7065 · Computers, Equip & Sftwre Depre	129,227	134,490	135,943	1,453	99%	167,766	80%
Total Building Overhead Expenses	377,569	386,359	394,561	8,202	98%	480,843	79%
Total Expenses	4,914,295	5,044,911	5,187,313	142,402	97%	6,297,782	78%
Net Profit (Loss)	\$ 1,211,186	\$ 1,131,360	\$ 921,048	\$ 210,312	-29%	\$ 137,314	

Utah State Bar Balance Sheets

	4/30/2017	6/30/2016
ASSETS		
Current Assets		
Petty Cash	\$ 625	\$ 625
Cash in Bank	149,997	493,263
Invested Funds	4,790,245	5,455,595
Total Cash/Investments	4,940,867	5,949,482
Accounts Receivable	15,504	35,761
Prepaid Expenses	56,979	222,763
A/R - Sections	10,926	7,874
Total Other Current Assets	83,409	266,398
Total Current Assets	5,024,276	6,215,880
Fixed Assets		
Property & Equipment	4,659,322	4,601,972
Accumulated Depreciation	(3,700,496)	(3,509,494)
Land	633,142	633,142
Total Fixed Assets	1,591,968	1,725,619
TOTAL ASSETS	\$ 6,616,244	\$ 7,941,499
LIABILITIES & EQUITY		
Liabilities		
Current Liabilities		
AP Trade	\$ 46,623	\$ 98,414
Other Accounts Payable	20,709	114,112
Accrued Payables	379,755	403,622
Cap Lease Oblig - ST		2,905
A/P - Sections	2,240	148,080
Deferred Revenue	6,050	2,144,858
Total Current Liabilities	455,377	2,911,991
Long Term Liabilities		
Capital Lease Oblig		-
Total Long Term Liabilities		-
Total Liabilities	455,377	2,911,991
Equity		
Unrestricted Net Assets (R/E)	5,029,507	5,029,507
Fund Balance - Current Year	1,131,360	-
Total Equity	6,160,867	5,029,507
TOTAL LIABILITIES & EQUITY	\$ 6,616,244	\$ 7,941,499

UTAH STATE BAR
Membership Statistics
April 30, 2017

<u>STATUS</u>	<u>04/30/16</u>	<u>04/30/17</u>	<u>Change</u>
Active	7,938	8,131	193
Active under 3 years	1,105	1,054	(51)
Active Emeritus	136	167	31
In House Counsel	56	69	13
Foreign Legal Counsel	-	2	2
Subtotal - Active	9,235	9,423	188
Inactive - Full Service	731	776	45
Inactive - No Service	1,780	1,853	73
Inactive Emeritus	121	301	180
Subtotal - Inactive	2,632	2,930	298
Total Active and Inactive	11,867	12,353	486
 <u>Supplemental Information</u>			
Paralegals	134	132	(2)
Associate Section Members	110	116	6
Journal Subscribers	125	125	-
 <u>Active Attorneys by Region</u>			
1st Division (Logan - Brigham)	139	167	28
2nd Division (Davis - Weber)	646	841	195
3rd Division (Salt Lake)	4,419	5,538	1,119
4th Division (Utah)	714	1,184	470
5th Division (Southern Utah)	323	493	170
Out of State	702	1,178	476
Out of Country	5	22	17
No region designated	2,287	-	(2,287)
Total Active Attorneys	9,235	9,423	188

Op-ed: Don't undermine the independence of Utah's judges

By Robert O. Rice
Published: May 4, 2017 05:57PM
Updated: May 4, 2017 06:13PM

Robert Gehrke's recent call for recall elections for judges warrants a brief discussion about the importance of an independent judiciary in Utah.

Gehrke made his proposal following criticism of Judge Thomas Low who, when sentencing Keith Robert Vallejo, who had been convicted of 10 counts of forcible sexual abuse and one count of object rape, remarked that "great men sometimes do bad things." Judge Low sentenced Vallejo to up to life in prison.

Responding to the judge's comments, Gehrke in his April 19 column concluded that "[i]t is well past time for Utah to join the ranks of states that have a mechanism for a recall election — not just for judges but for all elected officials."

A proposal to subject judges to recall elections is no small thing, inasmuch as Utah's judicial system is born out of a document no less important than the Utah Constitution. Our state's founders established Article I of Utah's Constitution to create an independent judiciary, a principle anchored in the English Magna Carta of 1215.

In *Lyon v. Burton*, the Utah Supreme Court observed that the purpose of an independent judiciary was "to bar sovereign power, whether kingly, parliamentary, or legislative, from undermining an independent judiciary and arbitrarily abolishing remedies that protect the person, property, or reputation of each individual."

Article VIII of the Utah Constitution goes on to permit judges to sit for extended terms, subject to voter approval in six-year retention elections. The retention election system allows jurists to dispense justice without regard to the vagaries of day-to-day public opinion.

As former U.S. Supreme Court Justice Sandra Day O'Connor once told Utah lawyers, "The



| Courtesy Robert Rice, op-ed mug.

reason why judicial independence is so important is because there has to be a place where being right is more important than being popular.”

Further, Utah's Judicial Conduct Commission administers the Utah Code of Judicial Conduct. That code consists of stringent ethical canons aimed at ensuring the fair and objective administration of justice. In response to filed complaints, the Judicial Conduct Commission can investigate judges and, where violations are found, recommend to the Utah Supreme Court disciplinary action, including that a judge be reprimanded, censured, suspended or removed from the bench.

Public reports indicate that at least one group has filed a complaint regarding Judge Low with the commission. In short, there is already an effective system in place to respond to concerns of the public, including crime victims.

Utah's constitutional and administrative underpinnings of its judicial branch have served Utah well. Thanks to a Legislature that has taken great care to preserve a strong judicial branch and a governor who has carefully selected well-qualified judges, our state is widely regarded nationally as having an excellent judiciary.

Utah's judges and court administrators enjoy an excellent national reputation when it comes to the efficient and effective operation of a judicial system that wrings exceptional value from every dollar it is allocated. My clients from around the country report their deep satisfaction with Utah judges who intelligently and dispassionately apply the law to the facts. Utah's excellent reputation in this regard is a testament to the success that comes from the proper maintenance of an independent judiciary.

It is currently fashionable to criticize judges with whom one disagrees. Of course, the press and the public should engage in spirited debate about important decisions handed down by courts, and even dissect the statements judges make in issuing their decisions. That is the nature of the open “perfect union” in which we live and clearly the province of the Fourth Estate. But to respond to controversial remarks or decisions by calling for judicial recall elections ignores the already-existing strength and credibility of Utah's judiciary and the importance of judicial independence that is founded in our state's Constitution.

Robert O. Rice is president of the Utah State Bar.

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