

Utah State Bar Commission

Friday, May 17, 2019

Law & Justice Center

Agenda

1. 9:00 a.m. President's Report: Dickson Burton

- 10 Mins. 1.1 Professional Services Tax Follow-up (**Tab 1, Page 3**)
- 10 Mins. 1.2 Reports on Commissioner Visits for Park City Convention Marketing
- 10 Mins. 1.3 Review Park City Summer Convention Schedule

2. 9:45 a.m. Action Items

- 15 Mins. 2.1 Select Lawyer of the Year Award Recipient (**Tab 2, Page 7**)
- 15 Mins. 2.2 Select Judge of the Year Award Recipient (**Tab 3, Page 28**)
- 10 Mins. 2.3 Select Section of the Year Award Recipient (**Tab 4, Page 40**)
- 10 Mins. 2.4 Select Committee of the Year Award Recipient (**Tab 5, Page 43**)
- 10 Mins. 2.5 Select Other Bar Award Recipients (**Tab 6, Page 46**)
- 05 Mins. 2.6 Confirm Representative to *And Justice for All* Board (**Tab 7, Page 48**)
- 05 Mins. 2.7 Select Comm. on Criminal & Juvenile Justice Nominees (**Tab 8, Page 50**)
- 30 Mins. 2.8 Approve Proposed 2019-2020 Budget (**Tab 9, Page 67**)

3. 11:25 a.m. Discussion Items

- 15 Mins. 3.1 Well-Being Task Force Draft Report Recommendations (**Tab 10, Page 116**)
- 05 Mins. 3.2 Reimbursements for Speakers and Panelists (**Tab 11, Page 143**)

4. 11:45 a.m. Information Item

- 15 Mins. 4.1 Report on Bar Survey: **Mark Morris**

5. 12:00 N. Luncheon with 50 Year Award Recipients & Leadership Academy

Consent Agenda (Tab 12, Page 146)

- 1. Approve Minutes of April 19, 2019 Commission Meeting
- 2. Approve Public Member Committee Report

Calendar

July 12	Executive Committee	12:00 Noon	Utah State Bar
July 18	Commission Meeting	9:00 - 11:00 am	Park City, Utah
July 18-20	Summer Convention		Park City, Utah

TAB
1

Concerns with a Tax on Legal Services

April 2019

The Utah State Bar supports a prudent review of tax policy and, where appropriate, reasonable and fair “modernization” of that policy. There are, however, unique and important public policy reasons why lawmakers should not impose a sales tax on legal services. They should also look to the example of other states in weighing these policy reasons as only one other state, **South Dakota**, adds a sales tax to legal services. South Dakota has a population of less than one million and has a different revenue source driving their tax systems and does not impose income taxes and depends heavily on sales tax. Just last year **Arizona** voters repealed their legislature’s attempts to put a sales tax on legal services soon after the tax was enacted.

There are several examples of states repealing their legislatures’ attempts to tax professional services.

- ✓ In 1987, **Florida** enacted a sales tax on legal services and repealed the measure six months later because it determined it put in-state businesses at a competitive disadvantage.
- ✓ In 1990, **Massachusetts** passed a sales tax on services provided to business. The state repealed the sales tax two days after it took effect because of fear of economic harm and potential job loss.
- ✓ In October 2007, **Michigan** enacted a broad tax on services and a taxpayer coalition was quickly formed to repeal it on the grounds it would negatively affect jobs. The tax was repealed 17 hours after it became effective.
- ✓ In 2013, **Massachusetts** approved an expansion of the definition of services to include computer and software design services and faced immediate backlash. Two months later, the legislation was repealed. Massachusetts also repealed a tax on services provided to business in 1990 two days after the tax took effect.
- ✓ In 2014, **Minnesota** enacted a tax on warehouse and storage services. After industry outcry, the tax was repealed prior to its effective date.
- ✓ In 2016, **Missouri** voters also prohibited state and local lawmakers from imposing taxes on any service or activity not already taxed.
- ✓ In 2018, **Arizona** voters overwhelmingly approved a constitutional amendment prohibiting state and local governments from taxing any service not already subject to tax.

(Over)

Hardships for Utah's Citizens

- ✓ A sales tax on legal services would tax Utah residents at times of misery, misfortune and vulnerability. Clients dealing with divorce, domestic violence, debt collection, estate issues from the death of a family member, personal injuries, criminal charges, property damage, housing, and bankruptcy do so from necessity, not choice. This "misery tax" would place yet another burden on those already suffering financial or personal crisis.
- ✓ A sales tax on legal services would tax people for taking responsible steps in managing their affairs. Examples include persons who wish to protect their families by drawing a will and appointing guardians; individuals buying and selling their homes or businesses; and those who are trying to incorporate a new business.
- ✓ Increasing the cost of legal services would deter individuals and small businesses from retaining lawyers at the outset, resulting in more costly legal problems and greater burdens on our state's judicial system down the road. An additional tax would push more people who need an attorney to "do-it-yourself" or other non-attorney options, or to no help at all. Another sad consequence would be that consumers will forgo needed preventative services and not only preventative legal help, but also preventative engineering or accounting help.
- ✓ Many legal transactions are already taxed, like estate administration, resulting in additional taxes through legal fees. Additionally, unlike non-service businesses, legal and other professionals pay income tax on their fees already.
- ✓ All communications between a client and his or her lawyer are confidential to protect the client. An audit on a lawyer's client fund account in administering the tax could threaten the client's attorney/client privilege and create a greater burden on lawyers' efforts to protect those communications.
- ✓ A sales tax on legal services would force lawyers to collect a tax on a tax already paid when using outside services in a legal matter, such as copy services or litigation support, creating a burdensome and unwanted multiplying or "pyramiding" effect, and rendering the final sales tax paid by the client a multiple of the original tax assessed.

Adverse Effects on Utah Business/Economic Development/Competitiveness

- ✓ The tax would encourage Utah citizens to seek professional services from out-of-state providers who are not taxed, putting Utah law firms at a competitive disadvantage. This is especially true of border communities and sophisticated clients, or clients of law firms that have out-of-state affiliates. No matter how sourcing is addressed, the perception will likely be that there are higher taxes relating to Utah service providers.
- ✓ In the same vein, imposing a sales tax on the legal services would place Utah's law firms at a competitive disadvantage to law firms in states that do not tax legal services at a time when out-of-state law firms already are competing for business against Utah law firms.

(Over)

- ✓ If service transactions are sourced to the buyer, this tax would discourage businesses who use professional services from locating in Utah, resulting in lost jobs, wages and tax opportunities.

Issues with Constitutionality

There may be constitutional problems in taxing a person's ability to retain counsel in certain circumstances, such as defending oneself in a criminal defense case or in taking money from a worker's compensation award. Unresolved questions as to the constitutionality of the proposed tax on legal services, which the State of Utah might well have to litigate over the next several years, include but are not limited to the following:

- ✓ **Access to courts.** Would the proposed tax on legal services impermissibly burden access to and use of the state or federal courts in violation of the Utah Constitution, Article III of the U.S. Constitution and the 5th, 6th and 14th Amendments to the U.S. Constitution?
- ✓ **Tax on litigation in federal courts may violate U.S. Constitution Supremacy Clause.** Would the proposed tax on legal services, in connection with litigation before the federal courts, violate the Supremacy Clause contained in Article VI of the U.S. Constitution?
- ✓ **Breach of confidentiality burdening right to counsel.** Would the proposed tax on legal services breach the attorney-client privilege and confidentiality, and thus impermissibly burden the right to counsel under both the Utah Constitution and the 6th and 14th Amendments of the U.S. Constitution?
- ✓ **Taxing some professions while exempting others may violate equal protection of law.** Would imposing a tax on legal and some professions, while exempting services rendered by other professions, be a violation of equal protection rights under the Utah Constitution and the 14th Amendment to the U.S. Constitution?
- ✓ **Burden on rights guaranteed in U.S. Constitution.** Would the proposed tax on legal services impermissibly burden the exercise of rights secured by the 5th, 6th, and 8th Amendments to the U.S. Constitution?
- ✓ **Violation of the Utah Constitution.** Does a sales tax on legal services violate the Utah Constitution, Article VIII, Section 4, which provides that "The Supreme Court by rule shall govern the practice of law"?

TAB
2

UTAH BAR COMMISSION MEETING AGENDA ITEM

Title: Lawyer of the Year Award Selection

Item: #2.1

Submitted by: Bar Awards Committee

Meeting Date: May 17, 2019

ITEM/ISSUE:

To select the 2019 Lawyer of the Year Award recipient.

CRITERIA:

Awarded 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:

<u>NOMINEE</u>	<u>NOMINATOR</u>	<u>PUBLIC?</u>
Ross C. Anderson	Robert Sykes	Yes
Peter W. Billings	H. Michael Keller	Yes
Paul Burke	J. Frederic Voros, Jr.	No
	James Jardine	Yes
	Shannon Minter	Yes
	Arthur Berger	Yes
	Chris Wharton	Yes
	Jesse Nix	Yes
	J. Mark Gibb	No
Patricia Christensen	Amy Oliver, WLU	Yes
	LaShel Shaw	Yes
Susan Griffith	Nicholas Stiles	Yes
John Huber	Stewart Young	Yes
Gary Johnson	Phillip Ferguson	Yes
Anthony Plachy	Anthony Plachy	Yes

BAR AWARDS COMMITTEE RECOMMENDATION(S) for COMMISSION CONSIDERATION:

1. Paul Burke

Previous Bar Awards Received: 2012 Pro Bono Attorney of the Year

2. Patricia Christensen

Previous Bar Awards Received: 1996 Dorathy Merrill Brothers, 2017 Charlotte L. Miller Mentor Award

PAST RECIPIENTS AND NOMINEES:

Past Recipients	Other Nominations That Year
2018 Karra Porter	Peter Billings, Gary Johnson, Rick Nydegger, Pamela Vickery
2017 Paul M. Simmons	Mark Moffat and Annie Taliaferro, Jeff Hunt
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

Christy Abad

From: WordPress <Nominations@utahbar.org>
Sent: Tuesday, May 07, 2019 11:29 AM
To: Christy Abad
Subject: New submission from Nomination Bar Awards

Nominator Name

J. Frederic Voros, Jr.

Utah State Bar Member

Nominee's Name

Paul Burke

Lawyer of the Year Award (Summer Convention)

I enthusiastically nominate Paul Burke for the Lawyer of the Year Award. Paul has shown vision and leadership for years in the Utah legal community. I know Paul primarily through our work together on the Utah Supreme Court Advisory Committee on the Rules of Appellate Practice. Paul now chairs that committee. He is a consummate appellate practitioner. Also, he has used his considerable professional prowess for good, protecting the legally vulnerable in Utah and elsewhere. An excellent example is Alex Cooper, whom he rescued from an abusive environment. Paul deserves the Lawyer of the Year award!

Please select one:

My nomination is private and should not be shared with the nominee or published, whole or in part, by the Utah State Bar.

Nominator Name

J. Frederic Voros, Jr.

Bar Number

03340

Email address

fvoros@zjbappeals.com

Date

Christy Abad

From: WordPress <Nominations@utahbar.org>
Sent: Thursday, May 09, 2019 10:18 AM
To: Christy Abad
Subject: New submission from Nomination Bar Awards

Nominator Name

James Jardine

Utah State Bar Member

Nominee's Name

Paul Burke

Lawyer of the Year Award (Summer Convention)

Paul Burke is an accomplished lawyer for private clients and vigorously engaged in public causes. He has served as General Counsel at our firm, Ray, Quinney & Nebeker, for 12 years and has represented clients in significant labor and employment matters and defended legal malpractice cases. He has advised national and international soccer federations. He has been active in civil rights and represented many individuals to vindicate those rights. Over a long and distinguished legal career, by his ethical and personal conduct, commitment and activities, Paul has exemplified for his fellow attorneys the epitome of professionalism; and has also rendered extraordinary contributions to the programs and activities of the Utah State Bar.

Please select one:

My nomination is public and I give permission for my nomination to be shared with the nominee and published, whole or in part, by the Utah State Bar.

Nominator Name

James Jardine

Bar Number

1647

Email address

jjardine@rqn.com

Date

Christy Abad

From: WordPress <Nominations@utahbar.org>
Sent: Friday, May 10, 2019 5:08 PM
To: Christy Abad
Subject: New submission from Nomination Bar Awards

Nominator Name

Shannon MInter

Utah State Bar Member

Nominee's Name

Paul Burke

Lawyer of the Year Award (Summer Convention)

I am delighted to nominate Paul Burke for the Utah State Bar's "2019 Lawyer of the Year" award in light of his extraordinary pro bono advocacy on behalf of Utah's LGBTQ community. I am the legal director of the National Center for Lesbian Rights (NCLR), a national legal advocacy organization for LGBTQ people. Over the past 25 years, I have worked with many private attorneys, but none more dedicated or who have made greater contributions to LGBTQ equality than Paul.

I first met Paul while working on Utah's marriage equality case, Kitchen v. Herbert. Paul provided invaluable guidance, and also authored powerful amicus briefs in the marriage equality cases heard by the U.S. Supreme Court.

In 2011, Paul consulted NCLR about his representation of Alex Cooper, a lesbian teenager from California whose parents sent her to live in Utah with a couple who subjected her to severe physical and emotional abuse in an attempt to change her sexual orientation. Paul went to heroic lengths to represent Alex and ensure that Utah lived up to its obligation to protect her. As a result of Paul's unfailing professionalism and principled advocacy, Alex was reunited and reconciled with her family, the right of minors to retain their own counsel was vindicated, and millions of Americans learned about this important issue through Saving Alex, a powerful retelling of this story by Joanna Brooks.

In my 25 years of practice, I have never seen an attorney provide a higher quality of legal representation than Paul provided to Alex. In the face of the many complex issues presented by her case, Paul consistently put her safety and well-being at the forefront and used every tool available to him to ensure that Utah's courts and child welfare authorities adhered to the law and protected her rights. The results he achieved were remarkable, including, to my knowledge, the first-ever court order expressly protecting an LGBTQ youth from being subjected to conversion therapy.

Paul has continued his public advocacy for the LGBTQ community in the past year, including by joining the Equality Utah Board and writing public commentaries that have been hugely influential in helping to educate the public about the importance of legal equality for LGBTQ people. I am particularly grateful for his extensive advocacy on behalf of legislative efforts to protect LGBTQ minors in Utah from conversion therapy. Especially on the 50th anniversary of Stonewall, it would be particularly meaningful and appropriate for the Utah State Bar to recognize Paul's extraordinary accomplishments this year.

Please select one:

My nomination is public and I give permission for my nomination to be shared with the nominee and published, whole or in part, by the Utah State Bar.

Nominator Name

Shannon MInter

Bar Number

CA 168907

Email address

sminter@nclrights.org

Date

5/10/2019

Christy Abad

From: WordPress <Nominations@utahbar.org>
Sent: Friday, May 10, 2019 5:55 PM
To: Christy Abad
Subject: New submission from Nomination Bar Awards

Nominator Name

Arthur Berger

Utah State Bar Member

Nominee's Name

Paul Burke

Lawyer of the Year Award (Summer Convention)

I nominate Paul Burke as the 2019 Utah Lawyer of the Year. Paul is an employment law litigator at Ray Quinney & Nebeker, where he has practiced for 22 years. I have known Paul, and worked with him, during that entire time.

Paul exemplifies what is best about our profession. He vigorously and successfully represents his clients, large and small, national and local. He has excellent judgment and is an exceptional advocate. He presses his clients' interests with tenacity and conviction, but also with the utmost civility and professionalism. Paul is a lawyer's lawyer. We selected him to serve as our firm's general counsel. He has served in that capacity for 12 years. He is also routinely hired by other lawyers to defend them in connection with claims of ethical misconduct or malpractice.

As a further credit to our profession, Paul spends significant time providing pro bono service to a variety of clients and causes. In acknowledgment of these efforts, he was recognized by the Utah State Bar as the pro bono attorney of the year in 2012. He not only engages in pro bono work on his own, but organizes the efforts of other lawyers in providing pro bono services. He has provided pro bono service to military families, religious minorities, victims of crime, and other groups. He also powerfully advocates on behalf of Utah's LGBTQ community, and speaks for those in our community without a voice. Paul also spends significant time mentoring younger lawyers.

Paul is a remarkable bridge builder. He is a person of great goodwill and is frequently able to forge consensus with those on the opposite side of policy and social issues. He does so by treating people not only with respect and dignity, but also with empathy.

Paul also spends significant time on a number of community endeavors outside the law, including Utah youth soccer and the U.S. Soccer Federation.

Throughout his career, Paul has exemplified the very best of our profession and what it truly means to be a lawyer. He is deserving of this honor. I would be happy to answer any questions or provide additional information.

Please select one:

My nomination is public and I give permission for my nomination to be shared with the nominee and published, whole or in part, by the Utah State Bar.

Nominator Name

Arthur Berger

Bar Number

6490

Email address

aberger@rqn.com

Date

5/10/2019

Christy Abad

From: WordPress <Nominations@utahbar.org>
Sent: Friday, May 10, 2019 6:11 PM
To: Christy Abad
Subject: New submission from Nomination Bar Awards

Nominator Name

Chris Wharton

Utah State Bar Member

Nominee's Name

Paul Burke

Lawyer of the Year Award (Summer Convention)

I met Paul Burke in 2011 when he called to give me some unsolicited advice. I was representing the victim of an assault: a young, gay man attacked outside of a nightclub. Paul saw our story in the newspaper and tracked me down to give me some pointers on how to be more media savvy in high-profile cases like mine. I was still in my first years of practice and didn't realize I was doing anything "high profile." Why would a shareholder from one of the most prestigious law firms in Utah reach out to me, a nervous, untested associate from a small firm handling a pro bono case with no leads and no strategy? Because that's exactly the kind of thing that Paul does.

Paul soon became a valued mentor and very dear friend. Together, we have had the honor of collaborating on groundbreaking legal advances for lesbian, gay, bisexual, and transgender Utahns, and I have had the privilege of learning from Paul's passionate and unyielding dedication to equality. Paul taught me the invaluable lessons he learned representing Alex, a shy high school lesbian who was sent to Utah to undergo shuddering torture in the name of conversion therapy. Paul's efforts on the case were detailed more fully in the book, *Saving Alex*, and he was awarded the "2012 Pro Bono Attorney of the Year" for his selfless advocacy.

In 2013, I was serving on the board of the Utah Pride Center when Paul contacted me about a life-changing opportunity. He wanted to represent our organization in filing an amicus brief in the infamous Prop 8 and Windsor cases. With Paul's help, the Utah Pride Center was able to lead 28 other LGBTQ organizations from traditionally "red states" in submitting our brief to the United States Supreme Court, and Paul and I were able to attend oral arguments for those landmark cases.

Over the following years, Paul has continued to fight fearlessly for LGBTQ equality in Utah and across the country, co-authoring numerous op-eds on behalf of same-sex families in the Salt Lake Tribune, championing advances for queer athletes in the U.S. Soccer Federation, and becoming a trusted advisor for both the Utah Pride Center and Equality Utah.

On a personal and professional level, Paul has support me and my law partner in building one of the strongest LGBTQ-focused law practices in the state.

Please select one:

My nomination is public and I give permission for my nomination to be shared with the nominee and published, whole or in part, by the Utah State Bar.

Nominator Name

Chris Wharton

Bar Number

13399

Email address

chris@wolawutah.com

Date

5/10/2019

Christy Abad

From: WordPress <Nominations@utahbar.org>
Sent: Friday, May 10, 2019 6:45 PM
To: Christy Abad
Subject: New submission from Nomination Bar Awards

Nominator Name

Jesse Nix

Utah State Bar Member

Nominee's Name

Paul Burke

Lawyer of the Year Award (Summer Convention)

I nominate Paul Burke as the most inspiring choice for the Utah State Bar's "2019 Lawyer of the Year" award. Beginning as a law clerk at Ray Quinney in 1995, Paul's legal career is distinguished by his commitment to his clients and law partners, his service to our legal community, and his extraordinary dedication to changing the world through the law.

Paul is general counsel of Ray Quinney, a responsibility that requires the respect of his partners and associates. He's represented significant public and private clients, including Zions Bank, Governor Huntsman, and the University of Utah. His nearly twenty-four years at Ray Quinney embody his commitment and loyalty to his colleagues and clients.

Paul's dedication to the law does not stop at the doors of his law firm. His extraordinary service to our legal community includes twelve years as Chairman of the Appellate Rules Committee, co-chair of the New Lawyers Education Committee, and mentor in the New Lawyer Training Program for first-year lawyers. In 2012, I nominated Paul, my mentor in the NLTP, for the "Mentor of the Year" award. (my nomination letter is attached). He did not win the award, so now is the time to recognize him for a larger distinction that encompasses the entirety of his exemplary legal career.

Fifty years ago, the Stonewall riots began in New York City, sparking the beginning of the modern LGBTQ movement. Those prescient protesters used their voices to change the world back then, just as Paul uses his voice to change our world today. Paul was counsel of record to the United States Supreme Court for the Utah Pride Center and Equality Utah, and a nationwide coalition of equality groups in the Windsor and Proposition 8 cases. Paul arranged and led moot court arguments for the attorneys in *Herbert v. Kitchen*, the federal case that successfully challenged Utah's constitutional ban on marriage for same-sex couples. Despite threats from Utah Attorney General's office, Paul successfully rescued a lesbian teenager from an unlicensed conversion therapy

program and won the legal battle establishing the rights of LGBTQ teens to live openly in Utah.

On this 50th Anniversary of Stonewall, Paul is the most inspiring choice for "Lawyer of the Year" because of his exceptional legal advocacy for Utah's LGBTQ community, his dedication to the Bar, and commitment to his partners, colleagues, and friends.

Sincerely,
Jesse Nix

Please select one:

My nomination is public and I give permission for my nomination to be shared with the nominee and published, whole or in part, by the Utah State Bar.

Nominator Name

Jesse Nix

Bar Number

13314

Email address

jesse@conyersnix.com

Date

5/10/2019

Christy Abad

From: WordPress <Nominations@utahbar.org>
Sent: Friday, May 10, 2019 4:13 PM
To: Christy Abad
Subject: New submission from Nomination Bar Awards

Nominator Name

J. Mark Gibb

Utah State Bar Member

Nominee's Name

Paul C. Burke

Lawyer of the Year Award (Summer Convention)

I strongly recommend that you recognize Paul Burke's exemplary professionalism in the profession and his uncommon and extraordinary service to the community.

As Ray Quinney & Nebeker's first general counsel, Burke provides legal advice to that Firm's management and coordinates its legal affairs. He advises other law firms on professional ethics and risk management, and he defends lawyers accused of ethical misconduct or malpractice. His bio is at <https://rqn.com/attorney/paul-c-burke/>. Burke is an appellate advocate, who represented clients at the Utah Supreme Court and U.S. Supreme Court. For more than a decade, he served as a member and currently chairs the Utah Supreme Court's Advisory Committee on the Rules of Appellate Procedure. In 2012, the Utah State Bar recognized Burke as the "Pro Bono Attorney of the Year". He was recognized as a "Utah Hero" for his public advocacy for Utah's LGBT citizens. Burke advocates for military families, religious minorities, cyclists, and crime victims. His work defending an abused lesbian teenager's rights was chronicled in the book "Saving Alex."

Burke provides pro bono services to community organizations including the Utah Youth Soccer Association; while president from 2003 to 2005, he implemented historic rule and bylaw changes to employ more due process in its decision-making and recognized and helped meet the needs those players with less means. His talent was recognized nationally, thereafter serving in influential positions in the United States Soccer Federation, the governing body for amateur and professional soccer nationally. He was Federation Rules Committee Chair for 12 years, overseeing another successful overhaul of its bylaws and policies including as U.S. Soccer's Annual General Meeting Chair in March 2017. As Rules Committee Chair, Burke resolved and decided numerous professional and amateur disputes nationwide and assisted Federation representatives in their international soccer roles.

In 2003, Burke was Co-Chairman of the successful Salt Lake City bond campaign for the Salt Lake Regional Athletics Complex, the City's premier venue for youth and adult sports games and events. This Complex received state and community funding and hosts local, regional and national sporting events, with 16 multi-use fields on over 100 acres. It brings important economic benefits to surrounding communities and provides much-

needed premier playing fields for developing youth and adult community leagues. He was inducted into the Utah Youth Soccer Hall of Fame in 2016.

Paul exemplifies the service and professional traits attorneys should be emulating in their respective communities; please recognize him accordingly.

Please select one:

My nomination is private and should not be shared with the nominee or published, whole or in part, by the Utah State Bar.

Nominator Name

J. Mark Gibb

Bar Number

5702

Email address

mgibb@djplaw.com

Date

5/10/2019

NOMINATION FOR UTAH STATE BAR AWARD

Nominations should be substantive, and include details describing how the attorney meets and/or exceeds the criteria set forth in the award description. Nominations are limited to 400 words. Nominations may include up to two attachments (i.e., magazine/newspaper articles, letters of support for the nomination, etc.). Self-nominations are encouraged.

1. I, Amy Oliver, on behalf of Women Lawyers of Utah, desire to nominate the following

- ☐ Utah State Bar Member
☐ Utah State Bar Section
☐ Utah State Bar Committee
☐ Utah Legal Community Member or Organization

Patricia Christensen

(NAME)

for the following:

- 2.

- ☐ Dorothy Merrill Brothers Award
- ☐ Raymond S. Uno Award
- ☐ Judge of the Year Award
- ☒ Lawyer of the Year Award
- ☐ Section of the Year Award
- ☐ Committee of the Year Award
- ☐ Heart and Hands Award
- ☐ Community Member of the Year Award
- ☐ Pro Bono Service of the Year Award
- ☐ Professionalism Award
- ☐ Charlotte L. Miller Mentoring Award
- ☐ James B. Lee Mentoring Award
- ☐ Paul T. Moxley Mentoring Award
- ☐ Lifetime Service Award
- ☐ Special Service Award

PRESENTED AT -

[illegible]

3. Referring to the award criteria, in 400 words or less, please state the reasons for the nomination, i.e. the nominee should receive this nomination for the following reasons or based upon the following facts or events:

On behalf of the Women Lawyers of Utah, it is my honor to nominate Patricia ("Pat") W. Christensen for Lawyer of the Year. In addition to being incredibly successful in the legal profession, Pat has dedicated her life to empowering women and promoting justice and dignity for all.

For more than forty years, Pat has been a well-respected trial attorney with a prestigious law firm in Utah. Pat has also served as Judge Pro Tem of the Third Judicial District Court and an adjunct professor of law at the S.J. Quinney College of Law at the University of Utah. Pat has received numerous awards for her work, including the Federal Bar Association's Distinguished Practitioner Award, the Utah State Bar Association's Woman Lawyer of the Year, the Utah State Bar Association's Dorothy Merrill Brothers Award, and the Women Lawyers of Utah's Mentoring Award.

Pat has spent countless hours mentoring other women lawyers throughout her career on topics including professional development, work-life balance, and career advancement, to name a few. Pat presents to women's groups at other firms about professional development and work-life balance issues. She is the embodiment of a true mentor. As one women lawyer described it:

"The very first thing I noticed [about Pat] was the incredible loyalty and admiration that all of her associates had for her. I soon learned why. Even though I worked for a competitor, Pat took me under her wing and encouraged me to pursue professional opportunities. She teaches women how to advocate for themselves, how to earn the respect of clients, and how to manage difficult situations. Pat was the role model that I needed at a critical point in my development."

While she has made amazing contributions to her profession and the advancement of women lawyers, Pat's impact is felt well beyond the legal community. She has generously volunteered her time to a number of organizations whose primary objective is to empower women and minorities to ensure dignity for all. These include the Women's Resource Center, the Women President's Organization at the University of Utah, the Girl Scouts of Utah, the Utah Women's Forum (UWF), and IVUmed (a charity that provides urological procedures in third world countries).

Pat is that unique person who has had a tremendously successful legal career and selflessly shares her time, talents, and insights with others. We can't think of anyone more deserving of this award.

I have read the Schedule and Criteria regarding and relating to Utah State Bar Awards.

Nominator Name: Amy Oliver

Nominator Bar No. 8785

Nominator Email: olivera@sec.gov

Date Submitted: 5/10/19

Email Your Nomination To: **or,**
adminasst@utahbar.org

Mail Your Nomination To: **Utah State Bar Awards Committee**
645 South 200 East
Salt Lake City, UT 84111
ATTN: Executive Secretary

RAY QUINNEY & NEBEKER

May 10, 2019

Utah State Bar
645 S 200 E
Salt Lake City, UT 84111

Re: Pat Christiansen's Nomination for Distinguished Lawyer of the Year

Dear Distinguished Lawyer of the Year Award Nominating Committee:

Pat Christensen is the pinnacle of legal professionalism and achievement. I first met Pat when she was participating on a panel for first year law students and giving advice on how to successfully navigate law school and a legal career. By the end of the panel I thought, "wow, I want to be just like her!" Fast forward six year—after engaging Pat as my New Lawyer Training Program Mentor and serving with Pat on the WLU board for four years—and I know I can never be as amazing as Pat. But I will certainly try. And that's what the Lawyer of the Year Award is about. Honoring someone with an incredible career, a reputation of steel, who has made an indelible mark on the Utah State Bar and the legal profession and larger community.

Pat is an incredible, willing, thoughtful mentor. She has actively participated in the New Lawyer Training Program for many years. When I finally got up the courage to ask Pat if she would be my NLTP mentor she said, in typical Pat fashion, "I would be delighted." And delightful it was. Pat and I met at least once a month over the course of a year for hours-long lunches that stretched into the afternoon. Not only did Pat make herself readily available for our long lunches, she also responded quickly to my multiple random emails and phone calls, answering my most basic questions (how do I request a stipulated motion for extension of time?!) to helping prepare me for oral argument. Even though our NLTP relationship has long since ended, Pat still makes time to regularly join me for lunch. Pat is a mentor through and through.

Pat has contributed countless hours and energy to the Utah State Bar, Women Lawyers of Utah, and a whole host of other organizations, during the course of her 40-year career. The award announcement states it is to be awarded to a bar member "who has also rendered extraordinary contributions to the programs and activities of the Utah State Bar in the prior year." This is an important point. I would wager Pat has done more to contribute to the Utah State Bar during the span of her career than almost any other lawyer. More important, Pat rendered extraordinary services to the Utah State Bar in 1989 and again between 1989–94. When Pat served as WLU President in 1989, the Utah Judicial branch was facing significant budget cuts from the Utah Legislature. The then President of the Utah State Bar reached out to Pat and asked her if she and WLU would help, since the Bar's hands were tied and it was improper for them to take a political stance. Pat took charge and wrote a letter to every member of the bar in Utah explaining the proposed legislation, how it would affect the judiciary, and asking every member to not only vote against it but to educate their friends and their family. Long

Brit Merrill
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
801 323-3678 DIRECT
801 532-7543 FAX
bmerrill@rqn.com
www.rqn.com

story short, Pat's efforts were successful in beating back that legislation, the cuts did not happen, and Utah has long been recognized for its exemplary (and sufficiently funded) judiciary.

And this was just the beginning of Pat's career-long dedication to advocating for and working alongside the Utah State Bar. Immediately after serving as WLU president, Pat became co-chair of the Utah Gender and Justice Task Force in 1989 and served in that position through 1994. The purpose of the task force was

to inquire into the nature, extent, and consequences of gender bias as it might exist within the Utah Court System. The task force was charged with examining both substantive and procedural aspects of the law and making concrete recommendations for reform where necessary in order to ensure equal justice for all who use the courts.

Under Pat and her co-chair's direction, an army of attorneys and judges, along with the Bar, worked for years to implement the recommendations. Among its many accomplishments, the task force:

- worked with the police department to educate about how to handle domestic violence situations and remove the abuser and make sure the abuser stayed away;
- worked with the Statewide Association of Prosecutors;
- worked with the Administrative Office of the Courts to educate the courts;
- worked with the Women's Law Caucus at the U to have the legislature pass spousal rape legislation;
- worked with doctors to recognize domestic violence;
- worked with the YWCA and victims of domestic violence;
- Women Lawyers of Utah worked to adopt the child support guidelines; and
- Justice Durham created judicial training programs for all the courts.

In short, in making these great strides toward eliminating gender bias and other biases that would prevent equal access to justice, the task force completely revamped and reshaped the very fabric of the justice system. And all of this happened at Pat's direction. Because of Pat. I don't believe Pat's monumental work during this period of time has ever been sufficiently recognized. But it's not too late. Now is the time to recognize Pat, especially as she heads into retirement, for her steadfast contributions to the Utah State Bar and the legal community during the past 40 years.

Sincerely,



Brit Merrill

Christy Abad

From: WordPress <Nominations@utahbar.org>
Sent: Saturday, May 11, 2019 5:27 PM
To: Christy Abad
Subject: New submission from Nomination Bar Awards

Nominator Name

LaShel Shaw

Utah State Bar Member

Nominee's Name

Patricia Christensen

Lawyer of the Year Award (Summer Convention)

Over the course of her career, Pat has tirelessly served as a advocate, mentor, and friend. Though she may have technically been born in Texas, Pat exemplifies the pioneering spirit that has shaped our state.

She is an exceptional lawyer with a long list of impressive cases and victories. Her ability to build a book of business in the face of pervasive gender discrimination, including as a widow trying to raise two young sons alone, is incredible. But the hours she has billed and the cases she has tried seem almost insignificant when compared to her tremendous contributions to our legal community. Pat has dedicated herself to fighting to make space in our profession for every qualified individual, no matter who they are or where they come from. As a founding member of the Women Lawyers of Utah and a leader within bar and civic organizations, Pat has been instrumental in advancing gender and racial equality within our community. She fearlessly speaks up for equality, even when the cause is unpopular, and defends those who may not have the opportunity or means to defend themselves.

I admire Pat as a leader but am even more grateful to her as a mentor and friend. Over the course of her career she has generously and selflessly provided support to hundreds of attorneys, both within and without her firm. Pat is generous with her time, as precious as it is, and never shies away from helping those behind her and celebrating others' accomplishments. When you go to her for advice, she doesn't just share her wisdom; she also listens to you, goes to bat for you, and, when the occasion calls for it, gives you a shoulder to cry on.

Pat's dedication to her community reaches well beyond her fellow attorneys. Pat has contributed to dozens of civil and charitable organizations, standing for social justice and working to address economic inequality. At Parr Brown, she is kind not only to her partners and associates, but to the IT and janitorial staff. Our world is a better place because of her generosity and dedication to justness. I can't think of anyone better deserving of this award.

Please select one:

My nomination is public and I give permission for my nomination to be shared with the nominee and published, whole or in part, by the Utah State Bar.

Nominator Name

LaShel Shaw

Bar Number

13862

Email address

lashelshaw@gmail.com

Date

5/11/2019

TAB
3

**UTAH BAR COMMISSION MEETING
AGENDA ITEM**

Title: Judge of the Year Award Selection

Item: #2.2

Submitted by: Bar Awards Committee

Meeting Date: May 17, 2018

ITEM/ISSUE:

To select the 2019 Judge of the Year Award recipient.

CRITERIA:

Awarded to a Utah Judge or Justice whose 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:

<u>NOMINEE</u>	<u>NOMINATOR</u>	<u>PUBLIC?</u>
Hon. John Baxter	Paul Farr	Yes
Hon. James Gardner	Vinh Ly	No
Hon. Diana Hagen	Amy Oliver, WLU	Yes
Hon. Kimberly Hornak	Julie Lund	Yes
Hon. Thomas Kay	Mark Morris	No
Hon. Eric Ludlow	Chad Utley	Yes
Hon. David Nuffer	Eli Milne	Yes
Hon. Paul M. Warner	Steve Killpack	
	John Huber	Yes
Hon. Brooke Wells	Amy Oliver, WLU	Yes
	Lesley Manley	Yes
	Jane Marquardt	
Hon. Jeffrey C. Wilcox	James Elegante	Yes

BAR AWARDS COMMITTEE RECOMMENDATION(S) for COMMISSION CONSIDERATION:

- Hon. John Baxter**
Previous Bar Awards Received: None
- Hon. David Nuffer**
Previous Bar Awards Received: 2012 Special/Distinguished Award
- Hon. Brooke Wells**
Previous Bar Awards Received: None

PAST RECIPIENTS AND NOMINEES:

Past Recipients	Other Nominations That Year
2018 Hon. Thomas Higbee	Hon. Mary Noonan, Hon. Doug Thomas
2017 Hon. Fredric Voros, Jr., Hon. Stephen Roth	Hon. Robert K. Hilder (Deceased.)
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: WordPress <Nominations@utahbar.org>
Sent: Thursday, May 02, 2019 4:07 PM
To: Christy Abad
Subject: New submission from Nomination Bar Awards

Nominator Name

Paul Farr

Nominee's Name

John Baxter

Judge of the Year (Summer Convention)

Judge John Baxter of the Salt Lake City Justice Court has contributed to the quality of justice, and public perception of the judiciary in incredible ways. Judge Baxter presides over homeless court at the shelter as well as veterans court (and he is a veteran himself). He has developed the trust and respect of that community and has had an incredible impact there. While most members of the bar may not practice before him, there is no doubt that Judge Baxter has had as much of a positive impact on our community as any judge ever has. At various times Judge Baxter has received just about every award possible from within the judiciary. I believe it would be nice for his efforts to be recognized at a broader level through the bar.

Please select one:

My nomination is public and I give permission for my nomination to be shared with the nominee and published, whole or in part, by the Utah State Bar.

Nominator Name

Paul Farr

Bar Number

8719

Email address

pfarr@utcourts.gov

Date

5/2/2019

Christy Abad

From: WordPress <Nominations@utahbar.org>
Sent: Thursday, May 02, 2019 4:37 PM
To: Christy Abad
Subject: New submission from Nomination Bar Awards

Nominator Name

Eli Milne

Utah State Bar Member

Nominee's Name

David Nuffer

Judge of the Year (Summer Convention)

As Chief Judge of the U.S. District Court for the District of Utah, Judge Nuffer spearheaded the creation of the Southern Region of the Central Division to better serve residents and parties in southern Utah. Soon thereafter, he voluntarily stepped down as chief judge so that he could focus more time and energy toward increasing and improving the federal court's presence and practices in the Southern Region. As a result of his efforts, prospective jurors residing in the Southern Region are no longer required to travel to Salt Lake City for jury duty, civil cases are now assigned to a resident magistrate judge, and local practitioners and residents now have immediate access to the federal court system. In his interactions with people and parties, whether in the courtroom or in the grocery store, he is always kind, respectful, and courteous. And while he always takes his work seriously, he does not do so with himself. Rather, he is quick to laugh at himself, to overlook shortcomings in others, and to recognize his common humanity. Of all of the many judges whom I have come to know over the years, no one is, in my opinion, more distinguished than he.

Please select one:

My nomination is public and I give permission for my nomination to be shared with the nominee and published, whole or in part, by the Utah State Bar.

Nominator Name

Eli Milne

Bar Number

11171

Email address

**U.S. Department of Justice**

JOHN W. HUBER
United States Attorney
District of Utah

*Office of the United States Attorney
111 South Main Street, Suite 1800
Salt Lake City, Utah 84111-2176*

*(801) 524-5682
(800) 949-9451
Fax: (801) 524-3399*

April 26, 2019

H. Dickson Burton
President, Utah State Bar
TraskBritt
230 South 500 East #300
Salt Lake City, Utah 84110

Dear Mr. Burton:

You recently received a recommendation from Steven B. Killpack regarding Chief Magistrate Judge Paul M. Warner. I write you in strong support of Steve's submission. Paul Warner has offered his entire career to public service and he has made an indelible impact on the federal bar in Utah. His nearly eight years as United States Attorney was particularly remarkable, having been appointed by both President Clinton and President Bush. The office grew in size and stature during his tenure, and many of the most influential federal prosecutors and litigators of today were recruited by Paul and his leadership team. In other words, Paul's legacy of leadership continues in the federal bar.

Similar to Steve's submission, I could go on in great detail. Suffice it to say, Paul Warner has made an outsized impact on the legal community, and he is certainly worthy of the bar's serious consideration for recognition.

Sincerely,

A handwritten signature in black ink, appearing to read "John W. Huber", with a large, stylized loop on the left side.

JOHN W. HUBER
United States Attorney

[illegible]

3. Referring to the [award criteria](#), in 400 words or less, please state the reasons for the nomination, i.e. the nominee should receive this nomination for the following reasons or based upon the following facts or events:

For more than three decades, Magistrate Judge Brooke Wells has impacted the lives of thousands of lawyers who have worked with her as a colleague, opposing counsel, or litigants in her courtroom. But it is the lives of the most vulnerable criminal defendants where her impact has been felt the most.

Judge Wells was instrumental in the creation of a federal drug court and the first of its kind federal mental health court. Utah's federal mental health court has gained national recognition due in large part to Judge Wells' leadership. The model has now been implemented in other federal district courts across the country.

She presided over both mental and drug courts and continues to exhibit the same respect and courtesy to the participants in these programs as she did her criminal defendant clients.

Observers of both courts have commented that Judge Wells makes each participant feel important and frequently commends their hard work in trying to turn their lives around. For example, Judge Wells makes the participants feel less intimidated by the entire process by the demeanor in her courtroom. She steps down from the bench and personally interacts with the defendants, who are made to feel like participants in a program designed to help them rather than a criminal justice system only seeking to punish them. She has brought in cake to celebrate the successes of participants and to give hugs and encouragement to those who suffer setbacks. It is a truly unique place in the federal criminal justice system.

Judge Wells has been honored for her efforts with the Mentor of the Year Award from the Women Lawyers of Utah, the Alumni of the Year Award from the University of Utah Law School, and by the Fellows of the American Bar Foundation.

Judge Wells' entire career has been devoted to serving the public and giving back to the legal community. She has been a mentor to countless young lawyers and sincerely cares about each person that enters her courtroom. She is single-handedly responsible for the pioneering re-entry efforts in the District of Utah and many people owe her a debt of gratitude for helping them turn their lives around when others counted them out. We can't think of a more deserving candidate for Judge of the Year.

I have read the [Schedule and Criteria](#) regarding and relating to Utah State Bar Awards.

Nominator Name: Amy Oliver Nominator Bar No. 8785
 Nominator Email: olivera@sec.gov Date Submitted: 5/8/19

Email Your Nomination To: adminasst@utahbar.org

or,

Mail Your Nomination To: Utah State Bar Awards Committee
 645 South 200 East
 Salt Lake City, UT 84111
 ATTN: Executive Secretary

Christy Abad

From: WordPress <Nominations@utahbar.org>
Sent: Friday, May 10, 2019 1:45 PM
To: Christy Abad
Subject: New submission from Nomination Bar Awards

Nominator Name

Lesley Manley

Utah State Bar Member

Nominee's Name

Brooke Wells

Judge of the Year (Summer Convention)

It with great pleasure that I nominate Judge Brooke C. Wells, U.S. Magistrate Judge for "Judge of the Year."

I first met Judge Wells through the NLTP. I was very fortunate to have her as my mentor. Throughout our year mentorship (which was almost 10 years ago now), she served not only as my mentor as I navigated that difficult first year of legal practice, but she was my champion. For example, Judge Wells got me involved in the American Inns of Court and showed me that being a powerful woman with an amazing sense of style is really cool and nothing to ever apologize for.

After our mentorship ended, we remained friends and about a year later, she hired me to be her law clerk. I clerked for her for four years. During this time, I was able to see firsthand just what a great judge she really is. Judge Wells embodies the highest standards of judicial conduct for integrity, ethics, and independence. Her impressive career as a criminal attorney and her work with mental health and drug court have received a lot of attention. However, it's her abilities as a civil judge that I believe often go unrecognized and have had the most impact on me as a practicing attorney. Judge Wells has a keen ability to see the "forest through the trees" and is always prepared. A litigant can be assured that she would do her best to resolve the issues before her in a legally correct manner that was also fair. Two things that do not always go hand in hand.

Most of all, she is a true public servant. To this day, she requires her staff to be available to answer the telephone in her chambers from 8:30-5PM M-F. She wants to make sure that the public has the opportunity to talk to a live person should they have any questions. Also, a large majority of her docket encompasses social security disability appeals. These are cases where litigants are waiting for disability benefits which often means their ability to receive income to live. Judge Wells has always made these cases a priority as she recognizes the importance and impact these cases have on these individuals and their families.

I can think of no better judge to receive this recognition than Judge Wells.

Please select one:

My nomination is public and I give permission for my nomination to be shared with the nominee and published, whole or in part, by the Utah State Bar.

Nominator Name

Lesley Manley

Bar Number

13074

Email address

لمانley@joneswaldo.com

Date

5/10/2019



A Leader in Social Impact

Jane Marquardt
Vice Chair

May 10, 2019

Award Committee
Utah State Bar

Re: Nomination of Brooke C. Wells for Judge of the Year

Dear Members of the Award Committee,

It is my honor to nominate Judge Brooke C. Wells for the Utah State Bar's 2019 Judge of the Year award. I understand that others are submitting letters which include detailed information on her many accomplishments. Rather than reiterate that information, I wanted to simply let you know of my experience with Judge Wells. Her behavior over her long and storied legal career very clearly demonstrates her integrity and her ability to be unswayed by partisan interests or fear of criticism.

I met Brooke in 1974 during the first month of our freshman year of law school. Since that time, she has been a good friend, a reliable legal mind to help me sort out various cases, and a mentor. As we did not know many women who were already practicing law back then, Brooke and I and a small group of female classmates relied on each another for counsel, inspiration, and a helping hand when life events knocked us on our heels.

Let me give you two examples of her integrity. A couple years after our graduation in 1977, I realized that I was gay. It was not an easy time of my life, as I was married to a man and also worried that if anyone found out I was gay I would not be accepted as an attorney. Some people shied away from being seen with me. Not Brooke. She had no problem with giving me her full support. She was doing legal defender work, and despite hearing from some law enforcement officers that knew her that "she had been seen with me and was she gay too?" - Brooke never wavered in her personal and public support of me. The friendship of Brooke and one or two other law school friends literally saved my self-esteem and my sanity.

A few years into her legal career, Brooke was representing high profile criminal defendants through her work at the Salt Lake Defenders Association. She often received personal and public criticism for representing such "awful people." Not once did comments like that deter her from giving her best efforts to make sure her client was well represented. Her dedication set the standard for upcoming young lawyers, both women and men, of how to be a vigorous and honest defense attorney. No one understands the importance of the rule of law more than Judge Wells.

I appreciate the work of each of you, the members of the State Bar Award Committee, in reviewing the nominations. I can think of no finer person to receive the 2019 Judge of the Year award than Brooke. If you need any additional information, please do not hesitate to contact me.

Sincerely,



Jane Marquardt

TAB
4

UTAH BAR COMMISSION MEETING AGENDA ITEM

Title: Section of the Year Award Selection

Item: #2.3

Submitted by: Bar Awards Committee

Meeting Date: May 17, 2019

ITEM/ISSUE:

To select the 2019 Section of the Year Award recipient.

CRITERIA:

Awarded 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. The Section serves the Utah State Bar mission of being a united, inclusive organization - serving the legal profession and the public.

NOMINEES:

NOMINEE

NOMINATOR

PUBLIC?

LGBT Lawyers and Allies

Tim Houpt

Yes

BAR AWARDS COMMITTEE RECOMMENDATION(S) for COMMISSION CONSIDERATION:

1. Litigation Section

Previous Bar Awards Received: 1990, 1993, 1995, 2006 Section of the Year

PAST RECIPIENTS AND NOMINEES:

Past Recipients	Other Nominations That Year
2018 Cyberlaw Section	IP Section
2017 Limited Scope Section	LGBT & Allied Lawyers, IP Section, Family Law Section
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
5

UTAH BAR COMMISSION MEETING AGENDA ITEM

Title: Committee of the Year Award Selection

Item: #2.4

Submitted by: Bar Awards Committee

Meeting Date: May 17, 2019

ITEM/ISSUE:

To select the 2019 Committee of the Year Award recipient.

CRITERIA:

Awarded to a Committee 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. The Committee serves the Utah State Bar mission of being a united, inclusive organization - serving the legal profession and the public.

NOMINEES:

1. *Utah Bar Journal Committee*

BAR AWARDS COMMITTEE RECOMMENDATION(S) for COMMISSION CONSIDERATION:

1. *Utah Bar Journal Committee*
Previous Bar Awards Received: 1989, 2007 Committee of the Year

PAST RECIPIENTS AND NOMINEES:

Past Recipients	Other Nominations That Year
2018 Innovation in Law Practice Committee	
2017 Governmental Relations Committee	
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 Bar Journal 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	

I will nominate The Utah Bar Journal Committee for the award. William "Bill" Holyoak is retiring next month after serving for 20 years as the Editor and chief.

*Christine Critchley
Utah State Bar*

TAB
6

UTAH BAR COMMISSION MEETING AGENDA ITEM

Title: Special/Distinguished Service Award

Item #2.5

Submitted by: Bar Awards Committee
2019

Meeting Date: May 17,

ITEM/ISSUE:

To select a Special/Distinguished Service Award

NOMINEES:

<u>NOMINEE</u>	<u>NOMINATOR</u>	<u>PUBLIC?</u>
Dean Robert Adler	Lori Nelson	No
	Richard Burbidge	No
John Huber	Stephen Nelson	No
Steve Johnson	John Baldwin	No
Paul Toscano	Jon Rogers	No

BAR AWARDS COMMITTEE RECOMMENDATION(S) for COMMISSION CONSIDERATION:

1. Steve Johnson

Previous Bar Awards Received: None

PAST RECIPIENTS:

2001	WAINE C. RICHES
2002	KENT B. SCOTT
2002	REP. AFTON B. BRADSHAW
2002	REP. A. LAMONT TYLER
2003	HON. LEONARD H. RUSSON
2003	DEAN W. SHEFFIELD
2003	ELAINA MARAGAKIS
2003	GARY G. SACKETT
2005	UTAH MINORITY BAR ASSOCIATION
2006	S. J. QUINNEY COLLEGE OF LAW
2007	G. STEVEN SULLIVAN
2008	DAVID R. HALL
2012	HON. DAVID R. HAMILTON
	HON. DAVID O. NUFFER
	SAMUEL ALBA
	STEVEN T. WATERMAN
2014	YOUNG LAWYERS DIVISION
2017	HON. CHRISTINE M. DURHAM

INFO ONLY:

DISCUSSION:

ACTION NEEDED: X

TAB
7

**UTAH BAR COMMISSION MEETING
AGENDA ITEM**

Title: Confirm Representative to “and Justice for all” Board
Item No. 1.1
Submitted by: John Baldwin
Meeting Date: May 17, 2019

ITEM/ISSUE:

The Bar Commission has a spot on the “and Justice for all” Board that it fills by appointment. Nanci Bockelie has been serving in this position. Her term has expired and Ms. Bockelie would like to vacate the position. Anne Milne and Stewart Ralphs approached the Bar about filling the vacancy with someone well known in both the legal and political communities. The Bar has contacted Jacey Skinner, a Utah attorney who “fits the bill,” and she has agreed. Ms. Milne and Mr. Ralphs approved the choice and ask the Bar Commission to make the appointment.

TAB
8

**UTAH BAR COMMISSION MEETING
AGENDA ITEM**

Title: Utah Commission on Criminal and Juvenile Justice
Item: 2.8
Submitted by: John Baldwin
Meeting Date: May 17, 2018

ITEM/ISSUE:

The Utah State Bar requested resumes from lawyers who “primarily represent juveniles in delinquency matters” to submit to the Governor for his appointment to a new four-year position on the Utah Commission on Criminal and Juvenile Justice. This position was added to the Commission by the Legislature in the recent passage of H.B. 440. The Bar will send him a list of three nominees pursuant to the statute. The Bill may be found at <https://le.utah.gov/~2019/bills/static/HB0440.html>.

APPLICANTS:

1. Monica Diaz
2. Tasha Williams

INFO ONLY:

DISCUSSION:

ACTION NEEDED: X

To Whom It May Concern:

I am writing to express my interest for the delinquency position on the Utah Commission on Criminal and Juvenile Justice. For the past ten year I have dedicated my career to the juvenile justice system. I began my delinquency career as a prosecutor for the Salt Lake County District Attorney's Office. I managed a large caseload with a constant influx of new cases. This position required extensive time management, high-level attention to detail, excellent organizational skills, and a wide range of legal knowledge. I appeared in court multiple times a week, litigating a wide variety of cases and representing the State in an array of hearing types.

In 2012, I transitioned to Utah Juvenile Defender Attorneys (UJDA) where I have spent the past seven years working as a delinquency defense attorney. In my role as a delinquency defense attorney, I manage large caseloads, appear in court multiple days a week and litigate a variety of cases including certification and serious youth offender cases. I utilize a variety of local and national standards to advocate for all the youth I represent.

I am also the managing attorney for UJDA. In this role I often oversee and train other attorneys on transfer standards and how best to implement them in ongoing cases. I also serve as the assigned attorney within my firm to train, supervise, and mentor third year law students. I assist law students in becoming familiar with criminal and juvenile law and build their practical experience within the courtroom. I also mentor newly admitted lawyers within my firm supporting their ability to problem solve cases, aid in practical options for case resolution, and build skills necessary for advocacy in juvenile court.

While serving in juvenile court I have had multiple opportunities to participate in problem solving courts. I have served as the prosecutor for the West Jordan Juvenile Drug Court, the defense attorney for the Salt Lake Juvenile Drug Court and as the defense attorney for the Third

District Juvenile Mental Health Court. In these roles, I worked as part of a multi-agency collaborative groups to resolve juvenile substance abuse issues and support juveniles who struggle with substance abuse and mental health issues through alternative dispositions within the delinquency system. I played an integral role in the evolution of the entrance criteria to Mental Health Court in order to conform to national research and edited the program's phase goals to align with evidence-based practices as well as recent legislative reforms.

My current work also gives me the opportunity to work as a leader within the community at large. Outside of my firm I serve on the Utah Supreme Court Ethics and Discipline Committee, the Bar Leadership Academy, the Utah State Courts' Language Access Committee, the McMillan Elementary Community Council, and am a bar exam grader. I have also served on the board of the Juvenile Law Section as the Chair, Vice-Chair, and Continuing Legal Education Coordinator.

Not only has my career established me as an expert in juvenile court, it has also given me the ability to efficiently and appropriately work with a wide range of people from diverse backgrounds. Through the juvenile court I have interact with the various juvenile court team members including probation officers, Guardian ad Litem attorneys, parental defense attorneys, parents, victims, Assistant Attorneys General, and Deputy District Attorneys as well as those stake holders outside the system such as legislators, law enforcement officers, and community members. Through these interactions, I developed an understanding of the importance of their unique roles and skills. I have the ability to work with difficult people with respect and professionalism while maintaining composure in high-stress situations. I have remarkable collaboration and interpersonal skills that will allow me to collaboratively work with all members on the commission.

I look forward to meeting with you and discussing this position further. I have attached my resume for your review. If you have any questions please feel free to contact me via email at mdiaz@ujda.org or call me at (801) 330-3007. I appreciate your consideration.

Sincerely,

/s/

Monica Diaz

MONICA DIAZ*8 East Broadway, Suite 500, Salt Lake City, UT 84111 · 801-330-3007 · mdiaz@ujda.org***BAR ADMISSION**

Utah State bar

October 2008

CERTIFICATIONS

JTIP Certified Trainer

July 2018

Juvenile Training Immersion Program

June 2017

EXPERIENCE**UTAH JUVENILE DEFENDER ATTORNEYS, LLC**

August 2012 – Present

*Managing Attorney**Salt Lake City, Utah*

- Defend minors in transfer cases to district court involving serious offenses including aggravated murder
- Defend minors in juvenile delinquency hearings including juvenile sex offenses
- Defend minor in parole revocation hearings
- Represent minors in juveniles detention hearings
- Represent minors in alternative court proceedings i.e. drug court, mental health court
- Draft succinct legal briefs including motions and supporting memoranda
- Manage budgets relating to trainings, presentation, and serious youth offender cases
- Mentor new attorneys within UJDA
- Train and mentor third year interns

SALT LAKE COUNTY DISTRICT ATTORNEY'S OFFICE

April 2009 – July 2012

*Deputy District Attorney**Salt Lake City, Utah*

- Litigate juvenile delinquency hearings including juvenile sex offenses
- Prosecute criminals in adult misdemeanor proceedings
- Draft succinct legal briefs including motions and supporting memoranda, responses to motions and supporting memorandums, motions for discovery, jury instructions, and notice of intended witnesses

THIRD DISTRICT COURT

July 2008 – April 2009

*Law Clerk/Attorney Law Clerk**Salt Lake City, Utah*

- Research and analyze complicated legal issues as projects on cases for various judges
- Draft bench memorandum for various motions and other legal matters submitted to the court

KENNECOTT UTAH COPPER CORPORATION

May 2007 – July 2008

*Law Clerk**Magna, Utah*

- Research, analyze, and draft memorandum, briefs, and motions regarding employment law and contract issues

EDUCATION**JURIS DOCTOR**

May 2008

*S.J. Quinney College of Law, University of Utah**Salt Lake City, Utah*

- Editor-in-Chief, Journal of Law and Family Studies
- Samuel and Bertha Bernstein Scholarship
- TA for First Year Writing Program 2007-2008, Academic Support TA for Property

BACHELOR OF SCIENCE

June 2002

*Westminster College**Salt Lake City, Utah*

- Certificate in Elementary and Secondary Education
- L.D.S. Foundation Endowed Scholarship
- Ross Beason Memorial Scholarship

MEMBERSHIPS/COMMITTEES

- Utah Supreme Court Ethics and Discipline Committee
- Utah Rules of Juvenile Procedure Rules Committee
- Utah State Bar – Leadership Academy Participant
- Utah Board of Juvenile Justice Expungement Clinic Committee
- Utah State Bar – Bar Exam Grader
- McMillan Elementary Community Council Member
- National Juvenile Defender Center
- Southwest Juvenile Defender Center
 - Including juvenile defenders from Arizona, Colorado, New Mexico, Oklahoma, Texas and Utah
- Utah Juvenile Law Section
 - Chair 2017-2018
 - Vice Chair 2016-2017
 - CLE Coordinator 2015-2016
- Utah Association of Criminal Defense Lawyers
- Utah State Courts Language Access Committee
- Women Lawyers of Utah
- Utah Minority Bar Association
- Juvenile Justice Services Hiring Committee for Assistant Detention Director
- Department of Human Services Hiring Committee for Juvenile Competency Attainment Coordinator

PUBLICATION

“Birthright Citizenship: Should the Right Continue?” – 9 J. L. & Fam. Stud. 159, Journal of Law and Family Studies

SPECIALTIES**MENTAL HEALTH COURT**

April 2014 – Current

- April 2014 – January 2017; Defense Counsel in 3rd District Juvenile Mental Health Court
- April 2014 – Current; Advisory Board Member

JUVENILE DRUG COURT

August 2011 – April 2014

- August 2011 – July 2012; Prosecutor for 3rd District Juvenile Drug Court
- August 2012 – April 2014; Defense Counsel for 3rd District Juvenile Drug Court

PRESENTATIONS**TRAINING & PRESENTATION TO STATEWIDE DELINQUENCY DEFENDERS**

April 2019

Juvenile Competency Defense Training

- Why, When, and How to Challenge Competency When Defending Juveniles in Utah

KEY NOTE SPEAKER

October 2018

Clean Slate: Celebrating 2nd Chances and New Beginnings

- Speech regarding why expungement is so integral to success of juveniles after termination from juvenile court

PRESENTATION FOR ACCESS TO JUSTICE: RURAL & TRIBAL SOUTHWEST PROJECT

March 2018

Stages of Advocacy: Advanced Juvenile Practice

- Motions to suppress post-Miranda statements and challenging the admissibility of a youth's statement in the wake of Utah Supreme Court decision 2017 UT 79

PRESENTATION AT SALT LAKE CITY LIBRARY

July 2017

Second Chance Kids

- Panel Presenter Regarding Fate of Juveniles Who Commit Serious Crimes

July 2017

PRESENTATION TO THE UTAH STATE COURTS*New Judge Orientation*

- Arraignment, Adjudication, and Disposition

March 2017

PRESENTATION TO THE UTAH ASSOCIATION OF CRIMINAL DEFENSE LAWYERS*Juvenile Law Seminar*

- Miranda Warnings and The Adolescent Brain

July 2016

PRESENTATION FOR THE UTAH STATE BAR JUVENILE LAW SECTION

- Juvenile Competency: How to Address Challenged Clients in Delinquency and Child Welfare Cases

May 2015

PRESENTATION TO THE UTAH ASSOCIATION OF CRIMINAL DEFENSE LAWYERS*Juvenile Law Seminar*

- School Search and Seizure Law

May 2015

PRESENTATION TO THE WINTER SCHOOL

- Drug and Alcohol Offenses and Consequences

October 2013

PRESENTATION AT THE UTAH PROBLEM SOLVING COURT CONFERENCE

- The role of a defense attorney in juvenile drug court

PROFESSIONAL AWARDS**2016 – UJDA ATTORNEY OF THE YEAR AWARD OF EXCELLENCE IN JUVENILE REPRESENTATION****OTHER EXPERIENCE****SALT LAKE CITY SCHOOL DISTRICT***English as a Second Language Certified**Teacher, Sixth Grade**Teacher, Eighth Grade**English as a Second Language Certified*

- Taught sixth grade state core materials and courses in eighth grade history
- Held student-parent-teacher conferences
- Conducted after school reading program for struggling readers
- Served on the elementary and middle school disciplinary committees
- Co-organized the middle school social science community project

August 2002 - August 2005
Salt Lake City, Utah**TRAINING****JUVENILE COMPETENCY DEFENSE TRAINING**

April 2019

- Developmental Immaturity in the Evaluation of Juveniles for Competency to Proceed in Delinquency Matters

JUVENILE DEFENDER LEADERSHIP SUMMIT

2012, 2013, 2014, 2015, 2016, 2017, 2018

- A national conference which is solely focused on juvenile delinquency defense through cutting-edge workshops conducted by national experts to help develop strategies for better representation of the legal interests of children.

ETHICS AND DISCIPLINE COMMITTEE ANNUAL CLE

August 2018

- Review of ethics rules, standards and producers to conduct ethics and discipline hearings

JTIP TRAINER CERTIFICATION COURSE

July 2018

- Three-day intensive train-the-trainer program centered on adult learning theory, training instruction, and a comprehensive introduction to JTIP and the JTIP training methodology.

JUVENILE CASE LAW AND LEGISLATIVE UPDATE

April 2018

STAGES OF ADVOCACY: ADVANCED JUVENILE DEFENSE

March 2018

- Training in advanced juvenile defense practice

REDEFINING JUSTICE: A COMMUNITY CALL TO ACTION

October 2017

ETHICS AND DISCIPLINE COMMITTEE NEW MEMBER TRAINING

September 2017

- Training on ethics rules, standards and producers to conduct ethics and discipline hearings

JUVENILE TRAINING IMMERSION PROGRAM

June 2017

- one-week intensive and interactive juvenile defender training program for front-line defenders

ANNUAL PROMISING YOUTH CONFERENCE (FORMERLY TROUBLED YOUTH CONFERENCE)

May 2017, May 2014

- multi-agency collaboration conference regarding youth in the delinquency and child welfare system

NATIONAL MENTAL HEALTH COURT SUMMIT

July 2016

- National conference addressing research, data, and mental health courts throughout the country

UTAH STATE DRUG COURT CONFERENCE

2011, 2013, 2015

- Research based training regarding juvenile delinquency drug

NOJOS CONFERENCE – FACING CHALLENGES AND CREATING CONNECTIONS

February 2015

- Multi-agency training regarding juvenile sex offenses and treatment in Utah

JUVENILE SEX OFFENDER REGISTRATION ISSUES

November 2014

JUVENILE COMPETENCY TRAINING

October 2013

PROSECUTOR SPRING CONFERENCE

2011, 2012

- State wide training and idea sharing conference for prosecutors

CROSS EXAMINATION TRAINING

September 2011

FALL PROSECUTOR TRAINING CONFERENCE

2009, 2011

- State wide training and idea sharing conference for prosecutors

SECURITIES FRAUD PROSECUTION

May 2011

FOURTH AMENDMENT: SEARCH AND SEIZURE

March 2011

PERSUASION IN THE COURTROOM: TRIAL ADVOCACY

July 2010

CHILDREN'S JUSTICE SYMPOSIUM/DOMESTIC VIOLENCE CONFERENCE

May 2010

- Training regarding sex offenses and domestic violence

DUAL ADJUDICATION SUMMIT

September 2009

- Training regarding issues specific to juveniles who have been dually adjudicated

NATIONAL DISTRICT ATTORNEY ASSOCIATION: PROSECUTOR BOOT CAMP

August 2009

CHILD FORENSIC INTERVIEW TRAINING

July 2009

Tasha M. Williams

8 E. Broadway, Suite 500
Salt Lake City, UT, 84111
(801) 521-5225
twilliams@ujda.org

Dear Members of the Search Committee,

On one day in late November I represented seven adults who applied for expungement of their juvenile records. Their experiences as adults – and my experience that day - was a remarkable reminder that juvenile courts are uniquely situated to intervene and change the trajectory of a life. That is why I would like to express my interest in the position on the Utah Commission on Criminal and Juvenile Justice.

For the past nine years, my sole area of practice has been representing juveniles in delinquency matters. This has led me to several other eye-opening opportunities: 1) I've participated in the restructuring of Third District's juvenile drug treatment court alongside the National Council of Juvenile and Family Court Judges; 2) I've trained other defenders as a certified trainer for the National Juvenile Defender Center; and 3) just this week I'm acting as an investigator for an assessment of the juvenile defense system in Michigan with the National Juvenile Defender Center. These opportunities have taught me that our best chance to rehabilitate Utah's young people is to strengthen the systems we have in place to shape them. That is why I hope to serve on the Utah Commission on Criminal and Juvenile Justice.

Please do not hesitate to ask me for more information about my experience and qualifications.

Many thanks,

A handwritten signature in black ink that reads "Tasha Williams". The signature is written in a cursive, flowing style with a large initial "T" and "W".

Tasha M. Williams

8 E. Broadway, Suite 500
Salt Lake City, UT, 84111
(801) 521-5225
twilliams@ujda.org

PROFESSIONAL EXPERIENCE

- 2010-
Present **Attorney, Utah Juvenile Defender Attorneys**
Advise and advocate for indigent juveniles accused of all felony and misdemeanor delinquent acts from detention hearing through termination. Negotiate plea deals, draft and argue pre-trial motions, and defend juveniles at bench trials and restitution hearings. Zealously advocate the juvenile's mitigating circumstances during disposition, through probation or placement, and post-termination. Attend yearly 3-day trainings via the National Juvenile Defender Center (NJDC).
- April 2019 **Investigator, National Juvenile Defender Center ("NJDC"), Kalamazoo, Michigan**
Investigator for NJDC's assessment of access to and quality of juvenile defense counsel in Michigan. Met with juvenile justice stakeholders, including judges, defenders, prosecutors, probation officers, and court administrators, and provided reports to NJDC.
- July 2018 **Certified Trainer, Juvenile Training Immersion Program**
National Juvenile Defender Center, Houston, Texas
Certified trainer for the Juvenile Training Immersion Program, a highly-specialized, comprehensive, 42-lesson trial advocacy training program designed to serve as the "gold standard" in training for juvenile defenders. Certification included emphasis on adult learning theory and training instruction.
- 2016-17 **Chair, Juvenile Law Section, Utah State Bar**
Arrange and coordinate continuing legal education and other opportunities for members of the Juvenile Law Section of the Utah State Bar. Previously served as Vice Chair and CLE Chair.
- Oct. 2007—
August 2010 **Associate Attorney and Law Clerk, Skordas, Caston & Hyde, Salt Lake City, Utah**
Negotiated plea deals, oral advocacy at pre-trial proceedings and sentencing hearings, legal research, draft and argue pre-trial motions, including but not limited to motions to suppress, motions to quash, and sentencing memorandums.
- Aug. 2007 — **Criminal Defense Clinical Participant, University of Utah College of Law**

- May 2008 Represented defendants accused of misdemeanor crimes in Salt Lake City under the third-year practice rule in both pre-trial and trial settings; participated in several bench and jury trials.
- Oct. 2006 – **Law Clerk, Utah Attorney General's Office, Litigation Division**
Oct. 2007 Researched and analyzed constitutional and employment issues; worked to limit damages in *Roska v. Sneddon* for the state's violation of the Roskas' due process rights.
- Fall 2006 **Law Clerk, Third District Court of Utah, Honorable Judith Atherton**
Researched and observed criminal proceedings, including the competency hearing of Brian David Mitchell, Elizabeth Smart's alleged kidnapper.
- Summer 2006 **Law Clerk, Executive Office of Immigration Review, Honorable William Nixon**
Wrote bench memos on asylum, deportation and other cases, prepared opinions on attorney motions, researched judicial ethics, and general immigration issues.
- Spring 2005 **Assistant to Majority Leadership, Utah State Senate**
Attended leadership meetings, coordinated press events and other media issues, assisted senators as needed, including coordinating fundraising event, and wrote press releases and news advisories.
- Various **Intern, United States Senate Judiciary Committee (2005), Washington D.C.**
Board Secretary, Capitol Preservation Board, State of Utah (2005)
Editorial Intern, The Salt Lake Tribune (2003)

AWARDS

- 2016 **Youth Advocate of the Year, Utah Board of Juvenile Justice**
One of five Utah juvenile defense attorneys recognized for "outstanding contribution to Utah's youth and the juvenile court system" that "exemplifies excellence in service to others".
- 2014 **Excellence in Juvenile Representation, Utah Juvenile Defender Attorneys**
Given once a year, the juvenile public defender office honor for "her skillful legal representation protects the rights of children, strengthens the ideals of our community, and changes the lives of children for the better".

EDUCATION

- 2008 **Juris Doctor**
University of Utah, S.J. Quinney College of Law

2005 **Bachelor of Science**, summa cum laude, Political Science and Communication
Southern Utah University

PRESENTATIONS

- April 2019 **"Defense Training Model Forensic Exercise for Juvenile Competency"**
 Small Group Facilitator, Juvenile Competency Defense Training
- Facilitator for small group, hands-on breakout sessions
- March 2019 **"Kids are Different: Myths and Facts About Sex Offending Court-Involved Youth"**
 Utah Sexual Violence Conference, "Uniting Utah for Change"
- Co-Presenter with Monica Maio, Appellate Attorney
- May 2018 **"Detention Problems" & "Challenging Juvenile Statements"**
 Rural Facilitator, Advocating in Delinquency Proceedings, Arizona Public Defender Association
- Facilitator for small group, hands-on breakout sessions in rural location of state-wide broadcast webinar.
- March 2018 **"Adolescent Development"**
 Stages of Advocacy, Advanced Juvenile Defense Practice
- Panel discussion with Dr. John Hollebeek, psychologist, and Chris Phillips, co-director of the Southwest Region of National Juvenile Defender Center
- Oct. 2017 **"Next Steps"**
 Juvenile Attainment Training, Utah Department of Human Services
- Panel discussion with Third District Juvenile Judge Mark May, Deputy District Attorney Aaron Aplin, and Dr. Matthew Davies
- March 2017 **"Understanding Juvenile Sexual Behavior and Child Victims and Witnesses"**
 Juvenile Law Seminar, *Utah Association of Criminal Defense Lawyers*
- Panel discussion with Dr. Matthew Davies, Dr. Rob Butters, and defense attorney Steven Beck
- May 2015 **"Navigating and Defending Juvenile Sex Cases"**
 Juvenile Law Seminar, *Utah Association of Criminal Defense Lawyers*
- Presentation with Sariah Donahoo, LCSW
- Dec. 2014 **"Juvenile Court Terminology and Case Law Update"**

Juvenile Law Seminar, *Utah Association of Criminal Defense Lawyers*

- Presentation with defense attorney Monica Maio

Dec. 2013 **“Juvenile Court v. Adult Court: The Role of the Juvenile Defense Attorney”**

Juvenile Law Seminar, *Utah Association of Criminal Defense Lawyers*

- Presentation with defense attorney Sophia Moore

Oct. 2009 **“Career Tips from the Other 80 Percent”**

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

- Panel discussion with 2 other law school graduates

PROFESSIONAL TRAININGS

April 2019 **Juvenile Competency Defense Training**

Utah Department of Human Services and Utah Juvenile Defender Attorneys

Feb. 2019 **2019 NOJOS Case Manager and Treatment Team Conference**

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

Oct. 2018 **Juvenile Defender Leadership Summit**

National Juvenile Defender Center, St. Paul, Minnesota

March 2018 **Stages of Advocacy, Advanced Juvenile Defense Practice**

Utah Juvenile Defender Attorneys and National Juvenile Defender Center

Feb. 2018 **2018 NOJOS Case Management and Line Staff Conference**

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

Oct. 2017 **Juvenile Attainment Training**

Utah Department of Human Services, System of Care

August 2017 **Juvenile Treatment Drug Courts Learning Collaborative: All Sites**

National Council of Juvenile and Family Court Judges, Leavenworth, WA

May 2017 **Race and Juvenile Justice Symposium**

National Juvenile Defender Center and Georgetown Juvenile Justice Initiative, Washington D.C.

May 2017 **38th Annual Conference of Agencies and Organizations**

Serving Promising Youth, Snowbird, Utah

Oct. 2016 **Juvenile Defender Leadership Summit**

National Juvenile Defender Center, Atlanta, Georgia

- June 2016 **NADCP 22nd Annual Training**
National Association Drug Court Professionals, Anaheim, California
- May 2016 **37th Annual Conference of Agencies and Organizations**
Serving Troubled Youth, Snowbird, Utah
- Oct. 2015 **Juvenile Defender Leadership Summit**
National Juvenile Defender Center, Salt Lake City, Utah
- Oct. 2014 **Juvenile Defender Leadership Summit**
National Juvenile Defender Center, Louisville, Kentucky
- June 2014 **Juvenile Training Immersion Program**
National Juvenile Defender Center and Georgetown University Law Center, Washington D.C.
- March 2014 **NOJOS Case Management Conference for Line Staff**
Utah Network on Juveniles Offending Sexually, Salt Lake City, Utah
- Oct. 2013 **Juvenile Defender Leadership Summit**
National Juvenile Defender Center, Scottsdale, Arizona
- March 2013 **NOJOS Case Management Conference for Line Staff**
Utah Network on Juveniles Offending Sexually, Salt Lake City, Utah
- Oct. 2012 **Juvenile Defender Leadership Summit**
National Juvenile Defender Center, Rio Grande, Puerto Rico
- March 2012 **NOJOS Case Management Conference for Line Staff**
Utah Network on Juveniles Offending Sexually, Salt Lake City, Utah
- Oct. 2011 **Juvenile Defender Leadership Summit**
National Juvenile Defender Center, Seattle, Washington
- Oct. 2010 **Juvenile Defender Leadership Summit**
National Juvenile Defender Center, Washington D.C.

MEDIA REFERENCES

- April 2019 **"Got a Juvenile Criminal Record? Head to an expungement Clinic"** *The Daily Herald*, April 27, 2019, available at
<https://www.heraldextra.com/news/local/crime-and-courts/got-a-juvenile->

[criminal-record-head-to-an-expungement-clinic/article_3483d00d-387d-55fa-b198-005877486c70.html](http://www.criminal-record-head-to-an-expungement-clinic/article_3483d00d-387d-55fa-b198-005877486c70.html)

- Sept. 2018 **"Salt Lake City's 'Aha' Moment"** *National Council of Juvenile and Family Court Judges*, available at <http://www.ncjfcj.org/salt-lake-citys-aha-experience>
- April 2017 **"Abdi Mohamed Update: A Judge Decided Today He'll Remain in the Juvenile System"** *City Weekly*, April 14, 2017, available at <https://www.cityweekly.net/BuzzBlog/archives/2017/04/14/abdi-mohamed-update>
- Jan. 2017 **"Many Utah Juveniles Charged With Crimes Don't Have Lawyers. That Needs to Change, Group Says"** *The Salt Lake Tribune*, Jan. 9, 2017, available at <http://www.sltrib.com/home/4747281-155/juvenile-justice-attorneys-for-all-and>
- Nov. 2016 **"Teen Charged in School Shooting Remains in Custody Following Hearing"** *The Deseret News*, Nov. 1, 2016, available at <http://www.deseretnews.com/article/865666120/Teen-charged-in-school-shooting-remains-in-custody-following-hearing.html>, see also <https://www.ksl.com/?sid=42056837&nid=148&title=teen-charged-in-school-shooting-remains-in-custody-following-hearing>
- Nov. 2016 **"Prosecutors Want School Shooting Suspect Tried as an Adult"**, *AP News*, Nov. 1, 2016, available at <https://www.apnews.com/2770210996fb4774b58c6f8e5723056d>
- Feb. 2015 **"A More Effective Solution for Teen Sexting"** *The Deseret News*, Feb. 27, 2015, available at <http://www.deseretnews.com/article/865622905/Education-not-harsh-penalties-is-a-more-effective-solution-for-teen-sexting.html>

TAB
9



UTAH STATE BAR DRAFT BUDGET FY 2019/20

May 13, 2019

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Utah State Bar FY20 Budget Narrative

Overview

The Utah State Bar's operations consist of 24 unique departments. Many of the Bar's departments are regulatory in nature and contain little discretionary income and expenses (e.g., Licensing, Admissions, NLTP, and OPC). Some departments are intended to support themselves (e.g., Admissions, CLE, Summer Convention, Fall Forum, Spring Convention, and Section Support), while others are fully supported by member license fees. Some departments generate income but not enough to support themselves and therefore must also rely on member license fees for support (e.g., Facilities and Bar Journal). MCLE, the Fund for Client Protection, and the 39 Sections are accounted for separately, support themselves, have stand-alone financial statements, and are not factored into the Utah State Bar budget. Below is a summary of each Bar department, its function, how it is funded, and its financial statement category:

Financial Statement Category	Department	Function	Funded By
Licensing	Licensing	Regulatory	License fees
Licensing	Licensed Paralegal Practitioner	Regulatory	License fees
Admissions	Admissions	Regulatory	Self-supporting
New Lawyer Training Program ("NLTP")	NLTP	Regulatory	Self-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 24 departments and one of 150 (or so) functional accounts (known as General Ledger accounts or “GL accounts”). The transaction’s department indicates who earned or spent the funds while the functional account reveals what type of income or expense it was. For example, commissioner travel expenses to Spring Convention would be assigned to department “21 – Commission/Special Projects” and GL account “5707 – Travel Commission Mtgs”. Another example is when Bar staff spend time working on the Spring Convention, those expenses are charged to department “12 – Spring Convention”, and GL account “5510 – Salaries/Wages”. By assigning both a department and a functional account to each transaction, we are able to classify all income and expenses to produce income statements by department and by functional account (which is required for external and IRS reporting).

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

For FY20 budgeting purposes, in an effort to be intentional and strategic about the investments the Bar is making in its various programs, the focus is on those departments that contain the majority of the Bar’s discretionary spending. As such, the main areas of focus will be Public Services, Member Services and Bar Operations. The three conventions, CLE, NLTP, and Section Support have all been budgeted to break even (plus or minus \$20,000). Admissions is intended to support itself and break even, however, given the declining number of applicants to the Bar, its revenue is no longer sufficient to cover its expenses, and a roughly \$88,000 loss is budgeted. 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. Each of the last nine fiscal years has generated a net profit adding to the Bar’s reserves. However, it is anticipated based on historical trends that expense growth will outpace revenue growth 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.

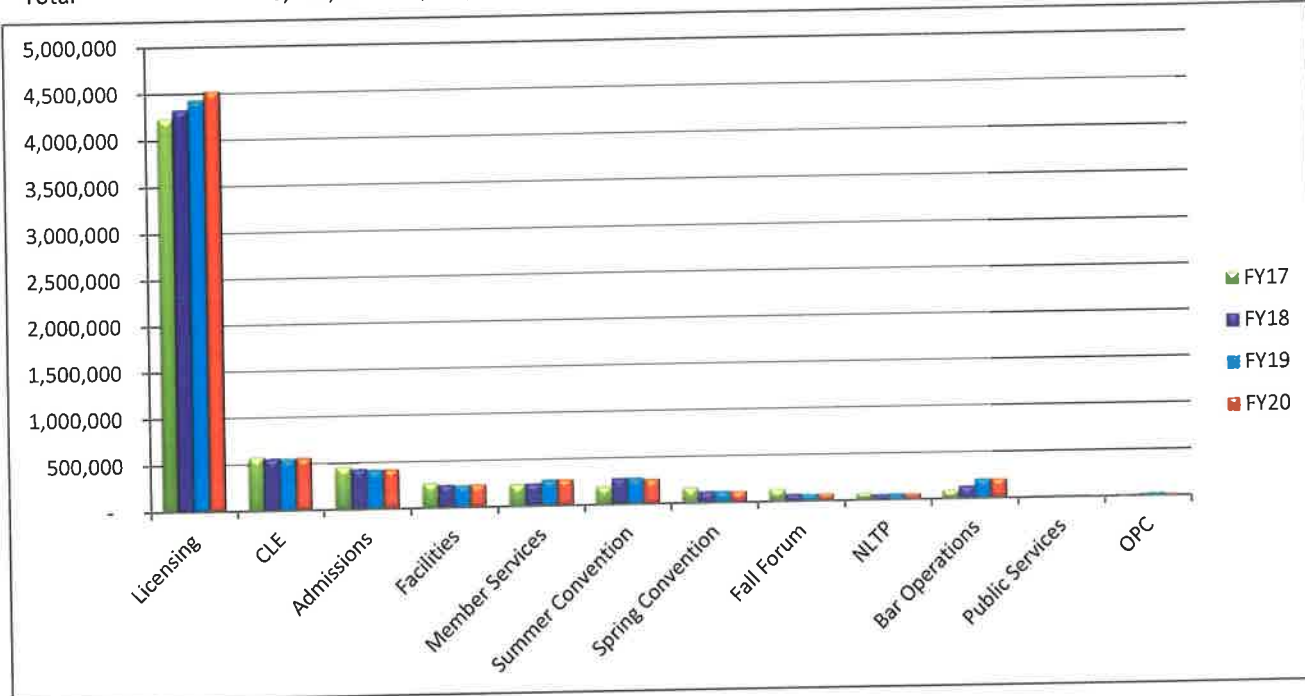
Key Changes

Built into the FY20 draft budget are the following key changes compared to FY19:

	Anticipated Change vs. FY2019
Licensing revenue (except late fees)	+2.0%
Admissions revenue	+0.0%
Salaries	+5.0%
Health insurance	+5.0%
Dental insurance	+5.0%
Building expenses (utilities, etc.)	+3.0%
Insurance expenses (liability, D&O, etc.)	+3.0%
Computer maintenance expenses	+3.0%

**Utah State Bar
FY20 Draft Budget
Revenue by Department**

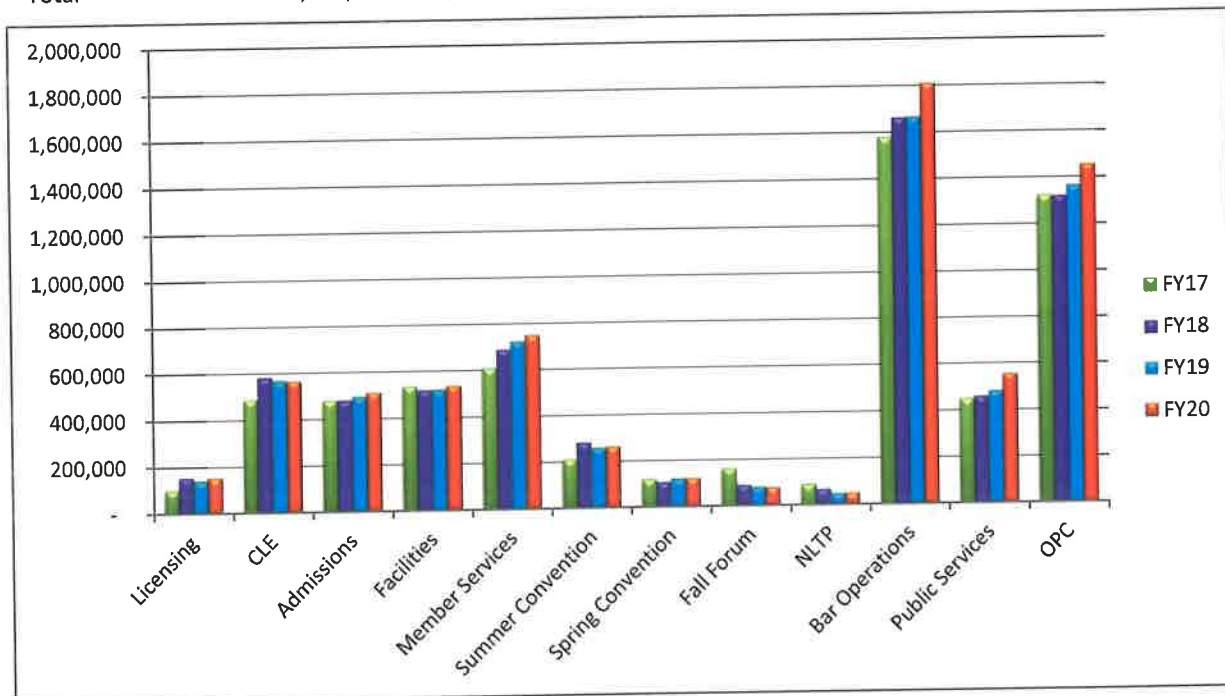
Revenue	Actual FY17	Actual FY18	Projected FY19	Budget FY20	% of Total	Trend
Licensing	4,231,420	4,334,919	4,437,205	4,525,292	65.7%	
CLE	581,039	565,080	561,449	566,000	8.3%	
Admissions	459,651	434,620	424,535	424,535	6.3%	
Facilities	261,640	248,542	239,890	248,600	3.5%	
Member Services	232,141	243,437	282,428	283,246	4.2%	
Summer Convention	189,772	283,280	286,310	266,000	4.2%	
Spring Convention	165,065	123,526	126,000	123,000	1.9%	
Fall Forum	129,611	83,328	79,578	80,400	1.2%	
NLTP	69,643	62,017	65,250	65,250	1.0%	
Bar Operations	89,619	136,052	209,952	210,561	3.1%	
Public Services	15,350	14,323	14,093	14,297	0.2%	
OPC	16,741	21,288	31,111	26,686	0.5%	
Total	6,441,692	6,550,412	6,757,801	6,833,867	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 80% of the Bar's income. We are projecting a 2% increase in licensing fees in FY20 compared to FY19 which equates to approximately \$88,000 in additional licensing fees. This projected increase is based historical trends over the last several years which have averaged just under 3% growth annually. CLE revenue is expected to remain consistent with levels from recent prior years. Because we have seen a slowdown in Admissions revenue due to a declining number of applicants, we are not projecting any change in Admissions revenue in FY20.

**Utah State Bar
FY20 Draft Budget
Expenses by Department**

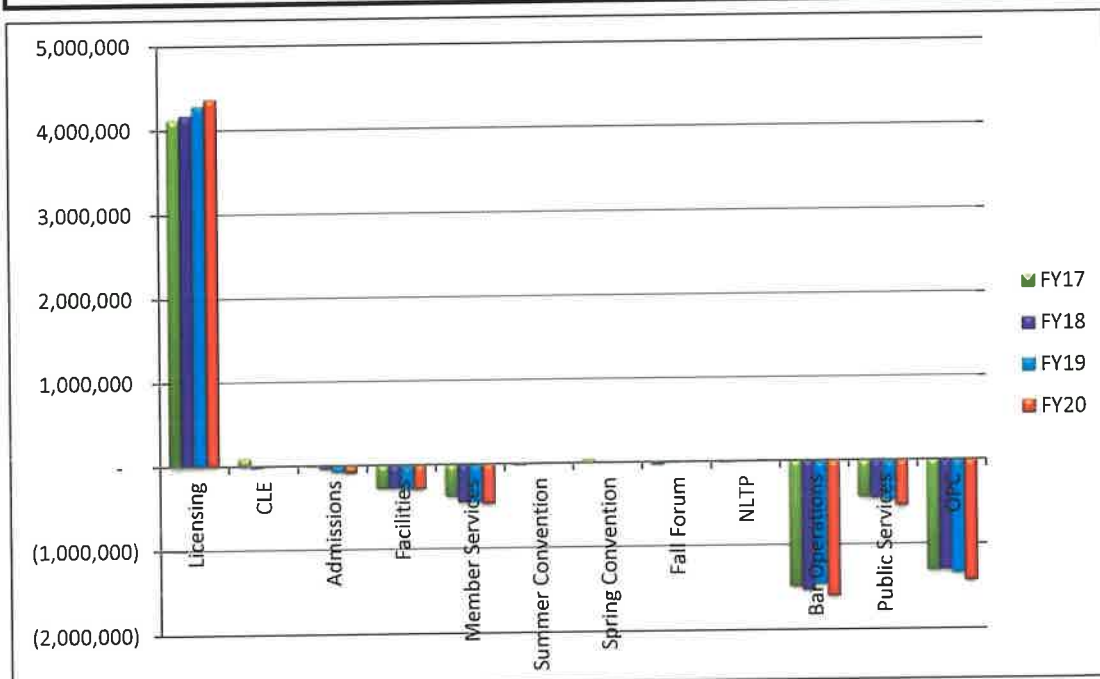
Expenses	Actual FY17	Actual FY18	Projected FY19	Budget FY20	% of Total	Trend
Licensing	100,475	157,183	143,402	156,048	2.2%	
CLE	487,096	585,023	571,506	566,079	8.8%	
Admissions	478,064	481,022	497,547	512,652	7.7%	
Facilities	534,500	519,194	522,413	536,782	8.0%	
Member Services	608,640	691,170	725,125	751,209	11.2%	
Summer Convention	209,328	284,030	261,682	265,605	4.0%	
Spring Convention	119,303	107,920	123,101	123,448	1.9%	
Fall Forum	161,530	90,989	83,700	80,738	1.3%	
NLTP	88,476	67,839	51,136	52,993	0.8%	
Bar Operations	1,579,773	1,664,544	1,668,325	1,811,802	25.7%	
Public Services	449,675	459,425	482,926	555,848	7.4%	
OPC	1,326,424	1,323,817	1,368,920	1,458,279	21.1%	
Total	6,143,283	6,432,157	6,499,784	6,871,482	95.4%	



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
FY20 Draft Budget
Net Profit (Cost) by Department**

Net profit (cost)	Actual FY17	Actual FY18	Projected FY19	Budget FY20	Trend
Licensing	4,130,945	4,177,736	4,293,803	4,369,244	
CLE	93,942	(19,942)	(10,057)	(79)	
Admissions	(18,413)	(46,402)	(73,012)	(88,117)	
Facilities	(272,860)	(270,652)	(282,523)	(288,182)	
Member Services	(376,499)	(447,733)	(442,697)	(467,962)	
Summer Convention	(19,556)	(750)	24,628	395	
Spring Convention	45,762	15,606	2,899	(448)	
Fall Forum	(31,919)	(7,662)	(4,122)	(338)	
NLTP	(18,833)	(5,822)	14,114	12,257	
Bar Operations	(1,490,154)	(1,528,492)	(1,458,374)	(1,601,241)	
Public Services	(434,325)	(445,103)	(468,833)	(541,551)	
OPC	(1,309,683)	(1,302,529)	(1,337,809)	(1,431,594)	
Total	298,408	118,254	258,017	(37,615)	



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
FY20 Draft Budget
Top 25 Gross Expense Categories (Based on Projected FY19)

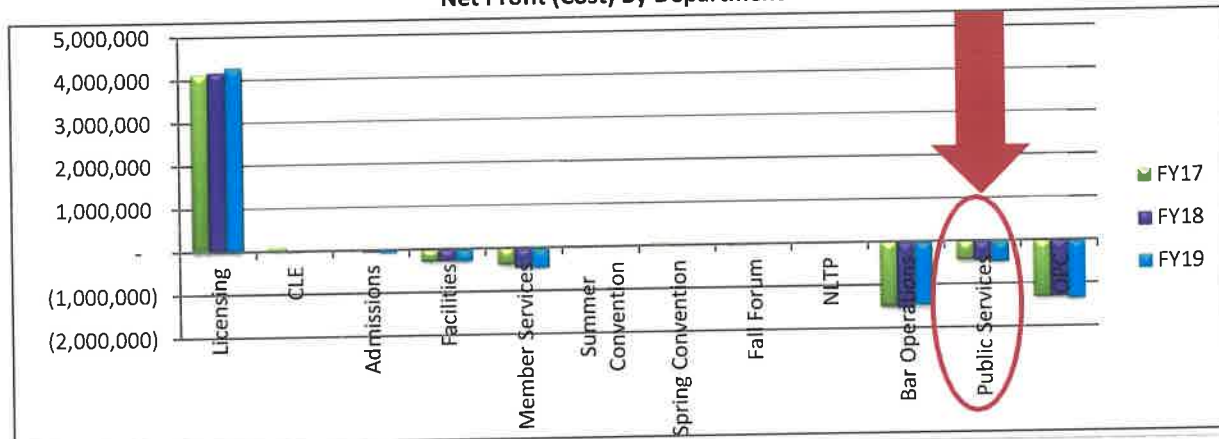
Top 25 Expense Categories	Actual FY17	Actual FY18	Projected FY19	Budget FY20	% of Total		Trend
Salaries & Benefits	3,366,129	3,368,216	3,464,467	3,668,258	53.30%		
Food & Beverage Expenses	539,876	587,127	553,556	529,323	8.52%		
Depreciation	234,804	243,588	240,170	249,796	3.70%		
Building Overhead	226,221	205,553	209,970	217,831	3.23%		
Other Misc Expense	13,140	9,068	28,649	169,636	0.44%		
Meeting Room Expenses	172,119	157,312	153,340	149,366	2.36%		
Travel	118,443	132,894	154,065	132,770	2.37%		
Copy/Printing Expense	130,348	139,012	129,426	132,599	1.99%		
Outside Consultants	40,428	107,887	92,330	112,740	1.42%		
Bar Exam Expenses	77,830	104,047	105,724	106,493	1.63%		
Special Event Expense	25,062	84,047	87,522	89,750	1.35%		
Blomquist Hale	73,958	73,946	73,881	73,881	1.14%		
Casemaker	68,730	71,313	73,706	73,800	1.13%		
3rd Party Revenue Sharing	68,682	64,158	70,978	71,000	1.09%		
Insurance Expense	65,267	67,438	68,420	69,990	1.05%		
LRE Support	65,000	65,000	65,000	65,000	1.00%		
Telecommunications Expense	75,571	68,379	62,616	62,220	0.96%		
Postage/Mailing Expense	54,802	60,459	61,497	61,455	0.95%		
Legislative Expenses	46,371	44,126	44,878	60,110	0.69%		
Advertising Expenses	13,341	48,203	40,922	52,317	0.63%		
Public Relations	1,948	50,280	50,000	50,000	0.77%		
Credit Card Fees	47,980	52,253	52,082	49,998	0.80%		
Office/Meeting Supplies	47,350	43,388	48,622	48,027	0.75%		
MCLE Fees	42,961	44,311	53,154	44,000	0.82%		
Speaker Expenses	64,823	49,667	26,202	43,116	0.40%		
Other	462,100	469,380	488,606	488,006	7.5%		
Grand Total	6,143,283	6,411,052	6,499,784	6,871,482	100.0%		

Instead of breaking down expenses based on department, this table categorizes them based on functional expense account across all departments. It reveals the top twenty-five accounts that make up more than 93% 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 9% 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 \$41,000 annually, or 0.5% of total expenses.

**Utah State Bar
FY20 Draft Budget
Public Services**

	Actual	Actual	Projected	Draft
	FY17	FY18	FY19	Budget
Program Net Cost				
Consumer Assistance Program (1 FTE)	126,333	130,618	127,457	133,537
Access to Justice (2 FTEs)	150,437	161,515	182,075	207,063
Tuesday Night Bar	34,885	36,695	34,881	35,133
LRE Contribution	65,000	65,000	65,000	65,000
UDR Contribution	10,000	-	-	-
Law Day	3,465	8,629	4,130	3,945
Staff time & other expenses associated with Committees	44,205	42,645	55,290	96,872
Public Service Programs Net Cost	434,325	445,103	468,833	541,551
Other Public Service Expenses Classified Elsewhere:				
In Kind Contributions to UDR, LRE, UCLI and other NFPs	22,882	20,517	20,277	20,277
Serving Our Seniors - YLD (estimated)	1,000	1,145	1,000	1,000
Wills for Heroes - YLD (estimated)	1,000	1,100	1,000	1,000
Other YLD Public Service Projects		2,984	2,950	2,950
Licensed Lawyer (some capitalized)	63,651	27,645	44,600	44,600
Expungement Day Clinic grant	-	3,000	-	-
Total Other Public Service Expenses	88,533	56,391	69,827	69,827
Public Services Net Cost	506,855	490,716	538,660	611,378

Net Profit (Cost) By Department

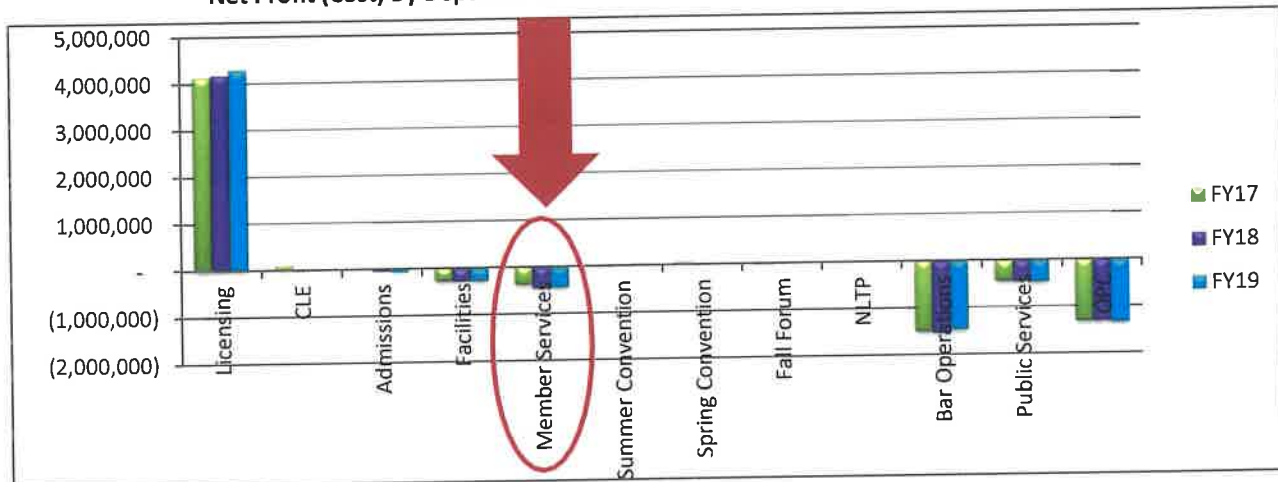


The above table shows the breakdown of Public Service expenses by program. The bar chart below the table depicts the net profit (cost) of each of the Bar's major functions and is presented to show how Public Services fits into the Bar's overall operations from a cost perspective. While it represents 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
FY20 Draft Budget
Member Services**

	Actual FY17	Actual FY18	Projected FY19	Draft Budget FY20
Program Net Cost				
Bar Journal (0.5 FTE)	17,663	23,308	(10,163)	(7,770)
Blomquist Hale	73,958	73,946	73,881	73,881
Casemaker	68,730	71,313	73,706	73,800
Section Support (1 FTE)	(4,568)	1,328	8,294	11,282
Legislative	55,256	53,283	60,132	75,760
Public Education (1 FTE)	124,522	166,246	183,681	187,819
Young Lawyers Division	39,017	54,238	58,321	58,328
Staff time & other expenses associated with Member Benefits	1,922	4,071	(5,154)	(5,137)
Member Service Programs Net Cost	376,499	447,733	442,697	467,962
Other Member Services Expenses Classified Elsewhere:				
Leadership Academy	11,871	12,400	20,000	20,000
Bar Review	830	2,219	1,979	1,500
Breakfast of Champions	780	-	-	-
Bar Anniversary	15,782	-	-	-
Practice Portal (some capitalized)	23,100	24,765	-	-
Total Other Member Service Expenses	52,362	39,384	21,979	21,500
Member Services Net Cost	428,862	487,118	464,675	489,462

Net Profit (Cost) By Department

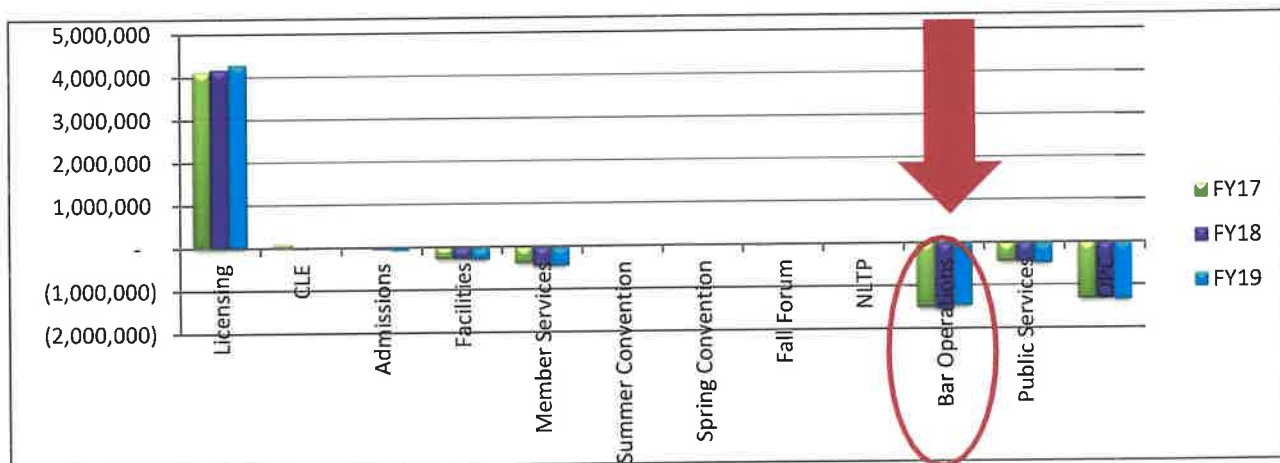


The above table shows the breakdown of Member Service expenses by program. The bar chart below the table depicts the net profit (cost) of each of the Bar's major functions and is presented to show how Member Services fits into the Bar's overall operations from a cost perspective. While it represents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

**Utah State Bar
FY20 Draft Budget
Bar Operations**

	Actual FY17	Actual FY18	Projected FY19	Draft Budget FY20
Program Net Cost				
Bar Management (4.5 FTEs)	720,096	682,600	624,974	711,579
General Counsel (2 FTEs)	283,242	302,876	303,921	316,499
IT (2 FTEs)	223,061	304,039	293,901	302,813
Commission/Special Projects	263,756	238,977	235,578	270,350
Bar Operations, net cost	1,490,154	1,528,492	1,458,374	1,601,241

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
Commission/Special Projects Spending Detail
Through 3/31/19

Sum of Amount Row Labels	Column Labels FY13	FY14	FY15	FY16	FY17	FY18	First 9 Months		Projected FY19	Budget FY20
							FY19			
85th Anniversary				15,782						
AAA Program (database modifications)				975						
ABA review				5,984						
Annual Report			627	465		475		500	500	
Awards	988	981	76	566	1,448	1,223	2,201	2,500	2,500	
Bar Review				1,465	830	2,219	1,229	1,500	1,500	
Books from Barristers	8,697	-917	590	-51	-14					
Breakfast of Champions				780	-387			500	500	
Civics Education	596	1,088								
Commission Convention/CLE Registration Fees				7,851	21,611	21,765	17,250	22,000	22,000	
Commission Gifts	10,228	1,746	4,273	8,223	1,886	4,303	797	5,000	5,000	
Commission Meeting Expenses		1	873	1,436	1,263	2,166	2,618	3,000	3,000	
Commission Meeting Food & Beverage	13,779	18,823	15,848	15,559	23,107	29,158	12,377	15,000	15,000	
Commission Meeting Room Rental	1,721	6,616	7,596	6,294	7,423	5,297	3,232	3,500	3,500	
Commission Photo	724	810	604	571	761	614	625	700	700	
Commission Stationery			1,029	4,377	2,343	2,922	1,743	2,000	2,000	
Copies	1,268	1,930	1,080	399	2,029	541	191	200	500	
E&O Insurance	7,718	8,256	8,802	3,000	4,797	5,112	3,969	5,000	5,000	
eBulletin				756	78	125				
Election Expense	3,235	4,330	3,250	3,250	3,250	3,256	1,905	3,250	3,250	
Futures Commission		1,394	1,938	2,148						
Leadership Academy				6,598	11,871	12,505	11,327	20,000	20,000	
Leadership Conference	5,129	360								
Licensed Lawyer				2,948	868					
Licensed Paralegal Practitioner				62						
Limited Scope Section					623	112		500		
Magna Carta Event			50,074	20						
Member Portal					917					
Misc Technology Expense					527					
Office Supplies	398	446	578			377	161	300	300	
Past Presidents Book				5,803						
Past Presidents Lunch	2,010	2,826		391	1,874			1,500	1,500	
Postage/Mailing	1,514	1,044	1,312	233	801	60	196			
Pres/Pres-Elect Monthly "Stipend"	17,500	17,500	9,000	17,250	18,000	18,000	14,000	18,000	18,000	
President's expense	2,665	1,504	380	3,120	1,118	3,936	2,231	5,000	5,000	
Retreat	17,113	17,340	12,311	29,840	21,080	35,009	31,293	35,000	25,000	
Secret Santa	500	500								
Section Fair @ SJ Quinney College of Law				494						
Section Leadership Training	3,129	1,271								
SJ Quinney College of Law Building Donation	49,500									
Small Firm Tour					33			2,000		
Sponsorship	2,200	1,600	1,200	8,000	3,225	1,600	2,170	3,100		
Staff	8,732	5,745	11,287	8,042	8,140	1,743	679	2,000	2,000	
Steve Hughes (speaker)	4,190									
Tech & Innovation Committee					162					
Travel - AAA Taskforce					414					
Travel - ABA Delegates	4,960	7,114	8,675	8,541	10,743	15,784	7,214	10,000	10,000	
Travel - ABA Meetings	9,451	13,766	11,249	10,363	15,865	13,624	7,948	11,000	11,000	
Travel - Commission Mtgs	8,765	9,744	3,180	3,293	2,894	2,801	2,077	3,000	3,000	
Travel - Jackrabbitt Bar	3,220	509	2,500	1,184	1,336					
Travel - Northwestern Bar Conf	1,984	1,561	599	979		2,538		2,600	2,600	
Travel - Other	426	1,769	695			1,006	74	500	500	
Travel - Spring Convention	6,936	9,398	8,689	13,599	11,788	10,033	8,748	11,000	11,000	
Travel - Summer Convention	23,321	26,559	21,258	23,388	36,355	33,667	42,986	43,000	25,000	
Travel - Western States Bar Conf	23,741	7,238	13,284	2,785	14,058	6,076	7,422	20,000	10,000	
Website					6,000					
Wipfli review					24,643					
UCLI - Utah Center for Legal Inclusion						253	216	500	500	
loss from 9274 (Sm Firm Tour)						677				
Reg Reform Task Force							5,912	10,000	10,000	
loss from 9322 (Cyber Security)							-67	-67	0	
Wellbeing Committee									50,000	
Grand Total	246,337	172,852	202,853	226,765	263,756	238,977	192,721	253,650	270,350	

**Utah State Bar
FY19 Draft Budget
Capital Expenditures**

Category	Projected								Total
	FY13	FY14	FY15	FY16	FY17	FY18	FY19	Budget FY20	
Office furniture & fixtures	17,741	26,002	3,433	-	1,483	9,355	-	10,000	69,206
Meeting room furniture & fixtures	21,359	-	-	-	-	-	-	-	40,740
Office equipment (copiers, phones, fax, projectors, mail machine, etc)	11,617	10,472	-	-	63,752	669	2,406	7,000	133,373
Building improvements	325,968	361,966	6,365	-	2,721	21,006	4,308	75,000	797,334
Computer equipment/servers/software	7,473	61,770	21,721	14,913	22,600	84,903	92,910	50,000	313,326
OPC database software (New Dawn/Journal Technologies)		32,227	100,224						132,451
Membership database (Euclid - ClearVantage)		274,181	50,966	7,020					332,167
Admissions database (Box Lake Networks - Synergy)		45,000							45,000
Pro Bono database (Euclid)			32,020	31,600					63,620
Licensed Lawyer (Euclid)				49,545	4,427				53,972
New Website (EKR)					18,950				18,950
Practice Portal (Euclid)					23,100			15,000	23,100
Certificate of Good Standing (COGS)							7,200		-
Total	384,158	811,618	214,729	103,078	137,033	115,933	106,824	157,000	2,023,239

Annual Maintenance Contracts (expensed over maintenance period):	Projected								Total
	FY13	FY14	FY15	FY16	FY17	FY18	FY19	Budget FY20	
ClearVantage Annual Maintenance (Euclid)				25,160	26,360	26,360	26,360	27,000	104,240
Licensed Lawyer Annual Hosting Fee (Euclid)					6,600	6,600	6,600	6,600	19,800
Journal Technologies Annual Maintenance			6,211	6,521	6,848	7,190	10,938	7,300	37,708
Synergy (Box Lake Networks) Admissions Database Annual Maintenance			3,900	3,900	3,900	3,900	3,900	3,900	19,500
BrainTrace							15,009	30,019	15,009
Total			10,111	35,581	43,708		47,798	44,800	181,248

This table shows capital expenditures by general category over the last six years. Capital expenditures include spending on assets that cost \$500 or more and have a useful life of at least three years. Once purchased these assets are depreciated ratably over their useful lives. A significant portion of the Bar's capital expenditures over the last few years have been on software and building improvements (the new HVAC system). That trend will likely continue into FY20. Most purchased software also requires annual maintenance 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
FY20 Draft Budget
Projected Cash Reserves**

Projected Cash Reserves, 6/30/19	\$ 3,741,013
Add: FY20 budgeted change in cash	55,180
Projected Cash Reserves, 6/30/19	3,796,193
Board Designated Reserves:	
Operations Reserve (3 months' operations)	1,717,871
Capital Replacement Reserve - Equipment	200,000
Capital Replacement Reserve - Building	650,000
Total Board Designated Reserves	2,567,871
Excess Cash Reserves over Board Designated & Contingency Reserves*	\$ 1,228,323

SUPPLEMENTAL SCHEDULES

Utah State Bar
Preliminary FY2018 Budget - Summary by Department
Based on Actual Results through 3/31/19

	Actual FY 2017	Actual FY 2018	Projected FY 2019	Draft Budget FY 2020	\$ Change 2019 Projected vs 2020 Budget	% Change 2019 Projected vs 2020 Budget
Revenue						
Licensing	4,231,420	4,334,919	4,437,205	4,525,292	88,087	2%
Admissions	459,651	434,620	424,535	424,535	-	0%
NLTP	69,643	62,017	65,250	65,250	-	0%
OPC	16,741	21,288	31,111	26,686	(4,425)	-14%
CLE	581,039	565,080	561,449	566,000	4,551	1%
Summer Convention	189,772	283,280	286,310	266,000	(20,310)	-7%
Fall Forum	129,611	83,328	79,578	80,400	822	1%
Spring Convention	165,065	123,526	126,000	123,000	(3,000)	-2%
Member Services	232,141	243,437	282,428	283,246	818	0%
Public Services	15,350	14,323	14,093	14,297	204	1%
Bar Operations	89,619	136,052	209,952	210,561	609	0%
Facilities	261,640	248,542	239,890	248,600	8,710	4%
Total Revenue	6,441,692	6,550,412	6,757,801	6,833,867	76,066	1%
Expenses						
Licensing	100,475	157,183	143,402	156,048	12,646	9%
Admissions	478,064	481,022	497,547	512,652	15,106	3%
NLTP	88,476	67,839	51,136	52,993	1,857	4%
OPC	1,326,424	1,323,817	1,368,920	1,458,279	89,359	7%
CLE	487,096	585,023	571,506	566,079	(5,427)	-1%
Summer Convention	209,328	284,030	261,682	265,605	3,922	1%
Fall Forum	161,530	90,989	83,700	80,738	(2,962)	-4%
Spring Convention	119,303	107,920	123,101	123,448	347	0%
Member Services	608,640	691,170	725,125	751,209	26,084	4%
Public Services	449,675	459,425	482,926	555,848	72,922	15%
Bar Operations	1,579,773	1,643,439	1,668,325	1,811,802	143,476	9%
Facilities	534,500	519,194	522,413	536,782	14,369	3%
Total Expenses	6,143,283	6,411,052	6,499,784	6,871,482	371,699	6%
Other						
Gain (Loss) on Disposal of Assets	-	-	-	-	-	-
Net Profit (Loss)	\$ 298,408	\$ 139,359	\$ 258,017	\$ (37,615)	\$ (295,632)	-115%
Depreciation	234,804	243,588	240,170	249,796	9,626	4%
Cash increase (decrease) from operations	533,212	382,948	498,187	212,180	(286,007)	-57%
Changes in operating assets/liabilities	767,484	452,669	15,000	20,000	5,000	33%
Capital expenditures	(137,033)	(115,933)	(106,824)	(157,000)	(50,176)	47%
Net change in cash	\$ 1,163,663	\$ 719,684	\$ 406,363	\$ 75,180	\$ (331,183)	-81%

- (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 3/31/19

	Actual FY 2017	Actual FY 2018	Projected FY 2019	Draft Budget FY 2020	\$ Change 2019 Projected vs 2020 Budget	% Change 2019 Projected vs 2020 Budget
Revenue						
4001 · Admissions - Student Exam Fees	\$ 143,625	\$ 130,025	\$ 120,725	\$ 120,725	\$ -	0%
4002 · Admissions - Attorney Exam Fees	58,050	47,475	45,725	45,725	-	0%
4003 · Admissions - Retake Fees	54,900	41,225	46,700	46,700	-	0%
4004 · Admissions - Laptop Fees	66,000	55,400	53,850	53,850	-	0%
4006 · Transfer App Fees	1,850	32,950	44,950	44,950	-	0%
4008 · Attorney - Motion	80,050	76,000	51,000	51,000	-	0%
4009 · House Counsel	21,250	23,800	22,100	22,100	-	0%
4010 · Section/Local Bar Support fees	97,818	98,883	99,660	100,835	1,175	1%
4020 · NLTP Fees	72,000	62,850	65,250	65,250	-	0%
4021 · Lic Fees > 3 Years	3,465,550	3,572,085	3,659,394	3,732,582	73,188	2%
4022 · Lic Fees < 3 Years	245,220	223,540	234,358	239,045	4,687	2%
4023 · Lic Fees - House Counsel	28,885	35,040	42,169	43,012	843	2%
4025 · Pro Hac Vice Fees	65,000	65,800	81,069	82,689	1,620	2%
4026 · Lic Fees - Inactive/FS	110,900	112,380	117,946	120,305	2,359	2%
4027 · Lic Fees - Inactive/NS	210,450	206,325	213,909	218,187	4,278	2%
4029 · Prior Year Lic Fees	4,111	5,685	3,365	3,432	67	2%
4030 · Certs of Good Standing	24,230	25,280	33,390	34,058	668	2%
4039 · Room Rental-All parties	114,573	109,925	100,535	110,000	9,465	9%
4042 · Food & Beverage Rev-All Parties	122,983	115,796	116,994	115,800	(1,194)	-1%
4043 · Setup & A/V charges-All parties	2,072	1,044	1,195	1,000	(195)	-16%
4051 · Meeting - Registration	395,745	404,028	406,178	386,000	(20,178)	-5%
4052 · Meeting - Sponsor Revenue	66,400	54,150	60,290	57,290	(3,000)	-5%
4053 · Meeting - Vendor Revenue	34,625	32,850	26,800	26,400	(400)	-1%
4054 · Meeting - Material Sales	-	2,185	-	-	-	0%
4055 · Meeting - Sp Ev Registration	5,428	16,856	18,410	17,500	(910)	-5%
4060 · E-Filing Revenue	19,783	21,809	33,622	33,622	-	0%
4061 · Advertising Revenue	138,837	148,172	181,492	181,492	-	0%
4062 · Subscriptions	60	60	90	90	-	0%
4063 · Modest Means revenue	11,800	11,225	10,725	10,939	214	2%
4071 · Mem Benefits - Lexis	1,167	696	1,455	1,455	-	0%
4072 · Royalty Inc - Bar J, MBNA, LM,M	6,734	6,225	6,680	6,680	-	0%
4081 · CLE - Registrations	491,151	468,040	466,126	470,218	4,093	1%
4082 · CLE - Video Library Sales	107,592	98,348	87,128	90,000	2,872	3%
4084 · Business Law Book Sales	9,753	6,856	6,552	-	(6,552)	-100%
4090 · Tenant Rent	21,672	21,672	21,086	21,700	614	3%
4093 · Law Day Revenue	3,540	3,570	3,870	3,870	-	0%
4095 · Miscellaneous Income	20,122	8,718	21,203	21,327	125	1%
4096 · Late Fees	90,800	96,850	63,033	63,033	-	0%
4103 · In - Kind Revenue - UDR	1,328	1,806	1,330	1,330	-	0%
4151 · ILM Realized Gains / Losses	65,209	124,366	184,847	184,847	-	0%
4152 · ILM Interest Income	12,983	(5,445)	(20,170)	(20,170)	-	0%
4153 · ILM Unrealized Gains / Losses	(11,302)	(6,938)	8,669	8,669	-	0%
4155 · General Interest Income	156	302	927	927	-	0%
4200 · Seminar Profit/Loss	(41,408)	(7,496)	11,174	13,400	2,226	20%
Total Revenue	6,441,692	6,550,412	6,757,801	6,833,867	76,066	1%
Expenses						
Program Services						
5001 · Meeting Facility-external only	41,435	42,646	44,444	42,400	(2,044)	-5%
5002 · Meeting facility-internal only	70,745	67,130	61,243	62,209	966	2%
5013 · ExamSoft	23,145	20,311	20,232	21,000	768	4%
5014 · Questions	48,085	79,436	79,500	79,500	-	0%
5015 · Investigations	285	300	350	353	3	1%
5016 · Credit Checks	2,332	2,273	2,200	2,200	-	0%
5017 · Medical Exam	2,560	240	240	240	-	0%
5025 · Temp Labor/Proctors	6,600	4,300	5,993	5,993	-	0%
5030 · Speaker Fees & Expenses	56,863	29,139	10,655	24,850	14,195	133%
5031 · Speaker Reimb. - Receipt Req'd	7,960	20,528	15,547	18,266	2,719	17%
5035 · Awards	6,299	5,068	4,509	5,087	578	13%
5037 · Grants/ contributions - general	9,450	11,700	6,570	6,400	(170)	-3%
5040 · Witness & Hearing Expense	9,334	639	1,661	4,465	2,803	169%
5041 · Process Serving	1,518	732	1,462	1,491	29	2%
5042 · Operations Audit	24,643	-	-	-	-	0%
5045 · Bar Anniversary	6	-	-	-	-	0%
5046 · Court Reporting	733	1,897	3,340	920	(2,420)	-72%
5047 · Casemaker	68,730	71,313	73,706	73,800	95	0%
5055 · Legislative Expense	46,371	44,126	44,878	60,110	15,232	34%
5060 · Program Special Activities	325	-	-	-	-	0%
5061 · LRE - Bar Support	65,000	65,000	65,000	65,000	-	0%
5062 · Law Day	8,226	12,339	8,900	8,715	(185)	-2%
5063 · Special Event Expense	24,737	84,047	87,522	89,750	2,228	3%
5064 · MCLE Fees Paid	42,961	44,311	53,154	44,000	(9,154)	-17%
5070 · Equipment Rental	59,938	47,536	47,654	44,757	(2,897)	-6%
5075 · Food & Bev-external costs only	454,026	508,871	476,774	452,081	(24,693)	-5%
5076 · Food & beverage - internal only	74,673	68,291	66,573	66,908	335	1%

Utah State Bar
Preliminary FY2018 Budget - Summary by Account
Based on Actual Results through 3/31/19

	Actual FY 2017	Actual FY 2018	Projected FY 2019	Draft Budget FY 2020	\$ Change 2019 Projected vs 2020 Budget	% Change 2019 Projected vs 2020 Budget
5079 · Soft Drinks	11,178	9,965	10,209	10,334	125	1%
5085 · Misc. Program Expense	14,648	10,096	9,580	10,342	762	8%
5090 · Commission Expense	25,814	28,655	26,656	27,176	520	2%
5095 · Wills for Heroes	668	1,676	856	856	-	0%
5099 · Blomquist Hale	73,958	73,946	73,881	73,881	-	0%
5702 · Travel - Lodging	40,807	56,913	56,518	55,146	(1,372)	-2%
5703 · Travel - Transportation/Parking	20,155	16,400	20,547	19,673	(874)	-4%
5704 · Travel - Mileage Reimbursement	8,491	12,585	16,458	13,434	(3,023)	-18%
5705 · Travel - Per Diems	4,131	6,131	4,781	4,522	(259)	-5%
5706 · Travel - Meals	941	1,479	1,031	959	(73)	-7%
5707 · Travel - Commission Mtgs	43,919	39,386	54,730	39,036	(15,694)	-29%
5805 · ABA Annual Meeting	6,853	21,806	22,160	22,159	(1)	0%
5810 · ABA Mid Year Meeting	15,009	23,465	19,298	19,930	632	3%
5815 · Commission/Education	26,235	24,783	20,864	24,964	4,100	20%
5820 · ABA Annual Delegate	9,617	16,284	12,490	11,938	(552)	-4%
5830 · Western States Bar Conference	25,411	13,659	20,146	17,146	(3,000)	-15%
5840 · President's Expense	19,015	19,687	20,188	20,000	(188)	-1%
5841 · President's Reimbursement	349	5,554	2,113	1,441	(672)	-32%
5845 · Reg Reform Task Force	-	-	5,912	10,000	4,088	69%
5850 · Leadership Academy	11,871	12,400	20,000	20,000	-	0%
5855 · Bar Review	830	2,416	1,979	1,500	(479)	-24%
5865 · Retreat	21,388	37,428	36,293	30,000	(6,293)	-17%
5866 · Wellbeing Committee	-	-	10,000	100,000	90,000	900%
5867 · Bar Membership Survey	-	-	-	50,000	50,000	#DIV/0!
5960 · Overhead Allocation - Seminars	-	-	15,000	10,750	(4,250)	0%
5970 · Event Revenue Sharing - 3rd Pty	68,682	64,158	70,978	71,000	22	0%
Total Program Services Expenses	1,616,946	1,731,045	1,734,773	1,846,681	111,908	6%
Salaries & Benefits						
5510 · Salaries/Wages	2,593,581	2,621,442	2,710,789	2,865,423	154,634	6%
5605 · Payroll Taxes	194,787	196,232	201,819	213,904	12,086	6%
5610 · Health Insurance	244,193	232,692	238,906	256,314	17,408	7%
5620 · Health Ins/Medical Reimb	-	4,960	7,953	8,364	410	5%
5630 · Dental Insurance	16,306	14,299	14,174	15,372	1,199	8%
5640 · Life & LTD Insurance	17,837	16,853	16,790	17,615	825	5%
5645 · Workman's Comp Insurance	3,009	2,544	2,524	2,650	126	5%
5650 · Retirement Plan Contributions	244,699	235,389	231,279	242,704	11,424	5%
5655 · Retirement Plan Fees & Costs	22,060	20,577	14,698	15,397	699	5%
5660 · Training/Development	25,802	19,226	21,805	26,785	4,980	23%
Total Salaries/Benefit Expenses	3,362,273	3,364,214	3,460,737	3,664,528	203,791	6%
General & Administrative						
7025 · Office Supplies	25,423	21,389	25,467	24,872	(595)	-2%
7033 · Operating Meeting Supplies	21,927	21,998	23,155	23,155	-	0%
7035 · Postage/Mailing, net	54,802	60,459	61,497	61,455	(42)	0%
7040 · Copy/Printing Expense	155,145	165,273	155,675	158,848	3,173	2%
7041 · Copy/Print revenue	(24,797)	(26,262)	(26,249)	(26,249)	-	0%
7045 · Internet Service	16,332	20,758	14,771	14,466	(305)	-2%
7050 · Computer Maintenance	28,112	28,232	37,613	38,277	663	2%
7055 · Computer Supplies & Small Equip	7,257	7,426	13,835	14,077	242	2%
7089 · Membership Database Fees	41,423	51,734	40,001	41,381	1,381	3%
7095 · Fax Equip & Supplies	-	(67)	3	3	-	0%
7100 · Telephone	59,238	47,688	47,841	47,751	(91)	0%
7105 · Advertising	13,341	48,203	40,922	52,317	11,395	28%
7106 · Public Notification	863	608	1,225	1,225	-	0%
7110 · Publications/Subscriptions	17,088	18,486	19,340	19,323	(17)	0%
7115 · Public Relations	1,948	50,280	50,000	50,000	-	0%
7120 · Membership/Dues	10,726	12,798	12,131	12,132	1	0%
7135 · Bank Service Charges	1,655	1,296	1,225	1,257	32	3%
7136 · ILM Service Charges	15,289	16,892	16,298	16,298	-	0%
7138 · Bad debt expense	-	-	-	-	-	0%
7140 · Credit Card Merchant Fees	106,545	109,131	110,175	109,834	(341)	0%
7141 · Credit Card surcharge	(58,564)	(56,878)	(58,093)	(59,836)	(1,743)	3%
7145 · Commission Election Expense	3,250	3,256	1,912	3,250	1,338	70%
7150 · E&O/Off & Dir Insurance	49,197	50,947	51,376	52,267	891	2%
7160 · Audit Expense	29,539	31,363	33,546	34,000	454	1%
7170 · Lobbying Rebates	49	140	111	114	2	2%
7175 · O/S Consultants	40,428	107,887	92,330	112,740	20,410	22%
7176 · Bar Litigation	22,694	22,356	25,000	25,000	-	0%
7177 · UPL	8,297	1,139	3,960	3,960	-	0%
7178 · Offsite Storage/Backup	3,995	4,228	4,681	4,681	-	0%
7179 · Payroll Adm Fees	2,819	2,826	2,853	2,853	-	0%
7180 · Administrative Fee Expense	1,037	1,176	877	877	-	0%
7190 · Lease Interest Expense	395	701	701	701	-	0%
7191 · Lease Sales Tax Expense	403	88	-	-	-	0%
7195 · Other Gen & Adm Expense	8,233	4,092	12,631	13,616	985	8%

Utah State Bar
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Based on Actual Results through 3/31/19

	Actual FY 2017	Actual FY 2018	Projected FY 2019	Draft Budget FY 2020	\$ Change 2019 Projected vs 2020 Budget	% Change 2019 Projected vs 2020 Budget
Total General & Administrative Expenses	664,087	829,644	816,812	854,647	37,835	5%
In Kind Expenses						
7103 · InKind Contrib-UDR & all other	22,882	20,517	20,277	20,277	-	0%
Building Overhead						
6015 · Janitorial Expense	30,147	30,155	29,797	31,003	1,206	4%
6020 · Heat	17,591	21,580	21,478	22,311	833	4%
6025 · Electricity	48,177	44,151	45,513	47,334	1,821	4%
6030 · Water/Sewer	5,165	5,426	7,302	7,584	282	4%
6035 · Outside Maintenance	13,781	12,438	13,641	14,096	455	3%
6040 · Building Repairs	32,496	10,006	20,236	20,918	682	3%
6045 · Bldg Mtncn Contracts	38,081	38,817	34,356	35,785	1,429	4%
6050 · Bldg Mtncn Supplies	2,394	5,282	4,440	4,596	157	4%
6055 · Real Property Taxes	37,664	37,207	32,761	33,744	983	3%
6060 · Personal Property Taxes	726	489	446	460	13	3%
6065 · Bldg Insurance/Fees	16,070	16,491	17,044	17,723	679	4%
6070 · Building & Improvements Depr	52,559	51,739	52,384	54,479	2,095	4%
6075 · Furniture & Fixtures Depr	15,363	15,612	14,172	14,755	583	4%
7065 · Computers, Equip & Sftwre Depr	166,882	176,237	173,614	180,562	6,948	4%
Total Building Overhead Expenses	477,095	465,632	467,184	485,349	18,165	4%
Total Expenses	6,143,283	6,411,052	6,499,784	6,871,482	371,699	6%
Other Income/Expense						
4300 · Gain (Loss) - Sales of Assets	-	-	-	-	-	-
Net Profit (Loss)	\$ 298,408	\$ 139,359	\$ 258,017	\$ (37,615)	\$ (295,632)	-115%

Utah State Bar
Preliminary FY2019 Budget
Based on Actual Results through 3/31/19
01 - Licensing

	Actual FY 2017	Actual FY 2018	Projected FY 2019	Draft Budget FY 2020	\$ Change 2019 Projected vs 2020 Budget	% Change 2019 Projected vs 2020 Budget
Revenue						
4010 · Section/Local Bar Support fees	\$ 16,821	\$ 17,039	17,879	18,237	\$ 358	2%
4021 · Lic Fees > 3 Years	3,465,550	3,572,085	3,659,394	3,732,582	73,188	2%
4022 · Lic Fees < 3 Years	245,220	223,540	234,358	239,045	4,687	2%
4023 · Lic Fees - House Counsel	28,885	35,040	42,169	43,012	843	2%
4025 · Pro Hac Vice Fees	65,000	65,750	81,019	82,639	1,620	2%
4026 · Lic Fees - Inactive/FS	110,900	112,380	117,946	120,305	2,359	2%
4027 · Lic Fees - Inactive/NS	210,450	206,325	213,909	218,187	4,278	2%
4029 · Prior Year Lic Fees	4,111	5,685	3,365	3,432	67	2%
4030 · Certs of Good Standing	24,230	25,280	33,390	34,058	668	2%
4095 · Miscellaneous Income	1,853	695	943	962	19	2%
4096 · Late Fees	58,400	71,100	32,833	32,833	-	0%
Total Revenue	4,231,420	4,334,919	4,437,205	4,525,292	88,087	2%
Expenses						
Salaries & Benefits						
5510 · Salaries/Wages	33,868	43,829	35,357	37,125	1,768	5%
5605 · Payroll Taxes	2,805	2,961	2,130	2,237	107	5%
5610 · Health Insurance	5,537	5,019	5,324	5,590	266	5%
5620 · Health Ins/Medical Reimb	-	49	70	70	-	0%
5630 · Dental Insurance	443	429	428	450	21	5%
5640 · Life & LTD Insurance	583	485	454	463	9	2%
5650 · Retirement Plan Contributions	3,061	3,765	2,631	2,763	132	5%
5655 · Retirement Plan Fees & Costs	702	710	507	532	25	5%
5660 · Training/Development	625	250	45	47	2	5%
Total Salaries/Benefit Expenses	47,624	57,497	46,946	49,276	2,330	5%
General & Administrative						
7025 · Office Supplies	1,670	790	322	322	-	0%
7035 · Postage/Mailing, net	11,411	10,584	10,106	10,106	-	0%
7040 · Copy/Printing Expense	5,399	3,923	3,895	3,895	-	0%
7050 · Computer Maintenance	1,733	1,862	2,652	2,732	80	3%
7089 · Membership Database Fees	8,119	7,664	3,530	3,635	106	3%
7100 · Telephone	2,644	1,780	1,138	1,138	-	0%
7110 · Publications/Subscriptions	80	80	80	80	-	0%
7140 · Credit Card Merchant Fees	73,421	75,568	74,530	74,530	-	0%
7141 · Credit Card surcharge	(58,564)	(56,878)	(58,093)	(59,836)	(1,743)	3%
7175 · O/S Consultants	-	-	114	117	3	3%
Total General & Administrative Expenses	45,989	45,541	38,273	36,719	(1,554)	-4%
Building Overhead						
6015 · Janitorial Expense	419	506	627	646	19	3%
6020 · Heat	245	376	452	465	14	3%
6025 · Electricity	670	742	957	986	29	3%
6030 · Water/Sewer	72	88	154	158	5	3%
6035 · Outside Maintenance	192	243	287	295	9	3%
6040 · Building Repairs	452	180	426	438	13	3%
6045 · Bldg Mtncn Contracts	529	653	723	744	22	3%
6050 · Bldg Mtncn Supplies	33	114	103	106	3	3%
6065 · Bldg Insurance/Fees	223	278	358	369	11	3%
6070 · Building & Improvements Depr	731	874	1,102	1,135	33	3%
6075 · Furniture & Fixtures Depr	214	264	298	307	9	3%
7065 · Computers, Equip & Sftwre Depr	2,314	2,994	3,652	3,761	110	3%
Total Building Overhead Expenses	6,092	7,312	9,138	9,412	274	3%
Total Expenses	99,705	110,350	94,356	95,407	1,050	1%
Net Profit (Loss)	\$ 4,131,715	\$ 4,224,569	\$ 4,342,849	\$ 4,429,886	\$ 87,037	2%

Utah State Bar
Preliminary FY2019 Budget
Based on Actual Results through 3/31/19
02 - Admissions

	Actual FY 2017	Actual FY 2018	Projected FY 2019	Draft Budget FY 2020	\$ Change 2019 Projected vs 2020 Budget	% Change 2019 Projected vs 2020 Budget
Revenue						
4001 · Admissions - Student Exam Fees	\$ 143,625	\$ 130,025	120,725	120,725	\$ -	0%
4002 · Admissions - Attorney Exam Fees	58,050	47,475	45,725	45,725	-	0%
4003 · Admissions - Retake Fees	54,900	41,225	46,700	46,700	-	0%
4004 · Admissions - Laptop Fees	66,000	55,400	53,850	53,850	-	0%
4005 · Admissions - Application Forms	-	-	2,000	2,000	-	0%
4006 · Transfer App Fees	1,850	32,950	44,950	44,950	-	0%
4008 · Attorney - Motion	80,050	76,000	51,000	51,000	-	0%
4009 · House Counsel	21,250	23,800	22,100	22,100	-	0%
4025 · Pro Hac Vice Fees	-	50	50	50	-	0%
4095 · Miscellaneous Income	1,526	1,945	7,235	7,235	-	0%
4096 · Late Fees	32,400	25,750	30,200	30,200	-	0%
Total Revenue	459,651	434,620	424,535	424,535	-	0%
Expenses						
Program Services						
5001 · Meeting Facility-external only	16,169	12,874	14,712	13,000	(1,712)	-12%
5002 · Meeting facility-internal only	7,525	6,761	6,759	7,000	241	4%
5013 · ExamSoft	23,145	20,311	20,232	21,000	768	4%
5014 · Questions	48,085	42,736	43,000	43,000	-	0%
5015 · Investigations	229	190	204	204	-	0%
5016 · Credit Checks	2,332	2,273	2,200	2,200	-	0%
5017 · Medical Exam	2,560	240	240	240	-	0%
5025 · Temp Labor/Proctors	6,600	4,300	5,410	5,410	-	0%
5046 · Court Reporting	166	1,746	420	420	-	0%
5070 · Equipment Rental	7,289	8,644	7,406	7,406	-	0%
5075 · Food & Bev-external costs only	7,361	3,409	5,818	5,818	-	0%
5076 · Food & beverage - internal only	9,467	8,376	8,716	8,000	(716)	-8%
5703 · Travel - Transportation/Parking	1,169	2,169	1,142	1,142	-	0%
5704 · Travel - Mileage Reimbursement	-	86	88	88	-	0%
5705 · Travel - Per Diems	736	1,013	685	685	-	0%
5706 · Travel - Meals	-	-	221	225	4	2%
Total Program Services Expenses	134,176	116,417	117,252	115,838	(1,413)	-1%
Salaries & Benefits						
5510 · Salaries/Wages	231,244	246,806	254,095	266,799	12,705	5%
5605 · Payroll Taxes	17,669	18,879	19,291	20,256	965	5%
5610 · Health Insurance	19,627	20,411	21,835	22,927	1,092	5%
5630 · Dental Insurance	1,330	1,286	1,384	1,453	69	5%
5640 · Life & LTD Insurance	1,610	1,571	1,604	1,684	80	5%
5650 · Retirement Plan Contributions	23,124	24,129	22,382	23,501	1,119	5%
5655 · Retirement Plan Fees & Costs	2,105	2,130	1,357	1,424	68	5%
5660 · Training/Development	1,349	995	1,135	1,192	57	5%
Total Salaries/Benefit Expenses	298,057	316,229	323,108	339,263	16,155	5%
General & Administrative						
7025 · Office Supplies	2,082	1,053	1,570	1,500	(70)	-4%
7035 · Postage/Mailing, net	1,786	1,440	1,597	1,500	(97)	-6%
7040 · Copy/Printing Expense	4,433	5,599	5,529	5,500	(29)	-1%
7050 · Computer Maintenance	2,824	2,824	2,824	2,824	(0)	0%
7055 · Computer Supplies & Small Equip	-	139	463	400	(63)	-14%
7089 · Membership Database Fees	3,900	3,900	3,900	3,900	-	0%
7100 · Telephone	3,956	3,347	3,414	3,375	(39)	-1%
7105 · Advertising	-	-	75	50	(25)	-33%
7110 · Publications/Subscriptions	1,181	147	208	175	(33)	-16%
7120 · Membership/Dues	720	735	735	735	-	0%
7140 · Credit Card Merchant Fees	10,600	9,250	9,032	9,100	68	1%
7150 · E&O/Off & Dir Insurance	3,960	4,072	4,088	4,080	(8)	0%
7175 · O/S Consultants	-	-	341	300	(41)	-12%
Total General & Administrative Expenses	35,443	32,506	33,777	33,439	(338)	-1%
Building Overhead						

Utah State Bar
Preliminary FY2019 Budget
Based on Actual Results through 3/31/19
02 - Admissions

	Actual FY 2017	Actual FY 2018	Projected FY 2019	Draft Budget FY 2020	\$ Change 2019 Projected vs 2020 Budget	% Change 2019 Projected vs 2020 Budget
6015 · Janitorial Expense	715	1,085	1,607	1,656	48	3%
6020 · Heat	417	835	1,159	1,193	35	3%
6025 · Electricity	1,142	1,590	2,455	2,529	74	3%
6030 · Water/Sewer	122	183	394	406	12	3%
6035 · Outside Maintenance	327	592	736	758	22	3%
6040 · Building Repairs	770	410	1,092	1,124	33	3%
6045 · Bldg Mtncn Contracts	903	1,402	1,853	1,909	56	3%
6050 · Bldg Mtncn Supplies	57	243	239	246	7	3%
6065 · Bldg Insurance/Fees	381	599	919	947	28	3%
6070 · Building & Improvements Depr	1,246	1,881	2,826	2,911	85	3%
6075 · Furniture & Fixtures Depr	364	569	765	787	23	3%
7065 · Computers, Equip & Sftwre Depr	3,945	6,483	9,365	9,646	281	3%
Total Building Overhead Expenses	10,387	15,870	23,410	24,112	702	3%
Total Expenses	478,064	481,022	497,547	512,652	15,106	3%
Net Profit (Loss)	\$ (18,413)	\$ (46,402)	\$ (73,012)	\$ (88,117)	\$ (15,106)	21%

Utah State Bar
Preliminary FY2019 Budget
Based on Actual Results through 3/31/19
03 - NLTP

	Actual FY 2017	Actual FY 2018	Projected FY 2019	Draft Budget FY 2020	\$ Change 2019 Projected vs 2020 Budget	% Change 2019 Projected vs 2020 Budget
Revenue						
4020 · NLTP Fees	72,000	62,850	65,250	65,250	-	0%
4200 · Seminar Profit/Loss	(2,357)	(833)	-	-	-	#DIV/0!
Total Revenue	69,643	62,017	65,250	65,250	-	0%
Expenses						
Program Services						
5002 · Meeting facility-internal only	1,715	1,680	1,520	1,500	(20)	-1%
5075 · Food & Bev-external costs only	29	1,232	88	100	12	14%
5076 · Food & beverage - internal only	3,288	3,505	2,803	3,000	197	7%
Salaries & Benefits						
5510 · Salaries/Wages	51,461	38,915	32,348	33,965	1,617	5%
5605 · Payroll Taxes	4,188	3,280	2,617	2,748	131	5%
5640 · Life & LTD Insurance	411	395	406	427	20	5%
5650 · Retirement Plan Contributions	5,151	1,050	1,555	1,633	78	5%
5655 · Retirement Plan Fees & Costs	702	-	164	173	8	5%
5660 · Training/Development	1,254	475	45	47	2	5%
Total Salaries/Benefit Expenses	68,978	46,070	37,140	38,996	1,857	5%
General & Administrative						
7025 · Office Supplies	53	63	7	7	0	2%
7035 · Postage/Mailing, net	171	73	19	19	0	2%
7040 · Copy/Printing Expense	1,192	91	73	74	1	2%
7050 · Computer Maintenance	941	941	936	900	(36)	-4%
7100 · Telephone	1,417	1,253	1,200	1,000	(200)	-17%
7120 · Membership/Dues	542	500	545	500	(45)	-8%
7140 · Credit Card Merchant Fees	1,755	1,427	1,454	1,400	(54)	-4%
7175 · O/S Consultants	-	-	114	100	(14)	-12%
Total General & Administrative Expenses	6,099	4,423	4,347	4,001	(346)	-8%
Building Overhead						
6015 · Janitorial Expense	437	405	354	365	11	3%
6020 · Heat	255	284	255	263	8	3%
6025 · Electricity	699	593	541	557	16	3%
6030 · Water/Sewer	75	74	87	89	3	3%
6035 · Outside Maintenance	200	155	162	167	5	3%
6040 · Building Repairs	471	130	240	248	7	3%
6045 · Bldg Mtnce Contracts	552	521	408	420	12	3%
6050 · Bldg Mtnce Supplies	35	66	53	54	2	3%
6065 · Bldg Insurance/Fees	233	221	202	208	6	3%
6070 · Building & Improvements Depre	762	693	622	641	19	3%
6075 · Furniture & Fixtures Depre	223	209	168	173	5	3%
7065 · Computers, Equip & Sftwre Depre	2,414	2,355	2,062	2,124	62	3%
Total Building Overhead Expenses	6,355	5,708	5,154	5,309	155	3%
Total Expenses	88,476	67,839	51,136	52,993	1,857	4%
Net Profit (Loss)	\$ (18,833)	\$ (5,822)	\$ 14,114	\$ 12,257	\$ (1,857)	-13%

Utah State Bar
Preliminary FY2019 Budget
Based on Actual Results through 3/31/19
04 - Bar Management

	Actual FY 2017	Actual FY 2018	Projected FY 2019	Draft Budget FY 2020	\$ Change 2019 Projected vs 2020 Budget	% Change 2019 Projected vs 2020 Budget
Revenue						
4060 · E-Filing Revenue	19,783	21,809	33,622	33,622	-	0%
4095 · Miscellaneous Income	1,447	829	1,335	1,335	-	0%
4103 · In - Kind Revenue - UDR	1,328	1,806	1,330	1,330	-	0%
4151 · ILM Realized Gains / Losses	65,209	124,366	184,847	184,847	-	0%
4152 · ILM Interest Income	12,983	(5,445)	(20,170)	(20,170)	-	0%
4153 · ILM Unrealized Gains / Losses	(11,302)	(6,938)	8,669	8,669	-	0%
4155 · General Interest Income	156	302	927	927	-	0%
Total Revenue	89,604	136,729	210,561	210,561	-	0%
Expenses						
Program Services						
5002 · Meeting facility-internal only	1,745	2,080	1,895	1,895	-	0%
5055 · Legislative Expense	220	-	110	110	-	0%
5063 · Special Event Expense	2,379	1,913	-	-	-	0%
5075 · Food & Bev-external costs only	3,007	4,214	2,013	3,000	987	49%
5076 · Food & beverage - internal only	1,038	759	615	615	-	0%
5079 · Soft Drinks	2,830	3,058	2,875	3,000	125	4%
5085 · Misc. Program Expense	1,200	-	491	400	(91)	-18%
5702 · Travel - Lodging	4,125	945	800	800	-	0%
5703 · Travel - Transportation/Parking	787	218	1,413	1,400	(13)	-1%
5704 · Travel - Mileage Reimbursement	17	343	85	85	-	0%
5705 · Travel - Per Diems	177	180	38	40	2	5%
5707 · Travel - Commission Mtgs	-	-	18	18	-	0%
5805 · ABA Annual Meeting	-	7,262	5,343	5,343	-	0%
5810 · ABA Mid Year Meeting	-	3,246	4,466	4,466	-	0%
5815 · Commission/Education	-	-	200	200	-	0%
5830 · Western States Bar Conference	11,353	7,583	7,146	7,146	-	0%
5867 · Bar Membership Survey	-	-	-	50,000	50,000	#DIV/0!
5960 · Overhead Allocation - Seminars	(25,316)	(23,376)	(19,250)	(19,250)	-	0%
Total Program Services Expenses	4,000	8,423	8,258	59,268	51,010	618%
Salaries & Benefits						
5510 · Salaries/Wages	530,278	527,038	522,545	548,673	26,127	5%
5605 · Payroll Taxes	39,196	37,016	37,216	39,076	1,861	5%
5610 · Health Insurance	36,845	41,483	41,656	43,739	2,083	5%
5620 · Health Ins/Medical Reimb	-	1,597	1,741	1,828	87	5%
5630 · Dental Insurance	2,525	1,787	1,603	1,684	80	5%
5640 · Life & LTD Insurance	3,035	3,010	2,861	3,004	143	5%
5645 · Workman's Comp Insurance	2,909	2,544	2,524	2,650	126	5%
5650 · Retirement Plan Contributions	52,269	53,550	51,880	54,474	2,594	5%
5655 · Retirement Plan Fees & Costs	3,319	3,549	2,535	2,662	127	5%
5660 · Training/Development	2,637	2,416	4,209	4,419	210	5%
Total Salaries/Benefit Expenses	673,014	673,990	668,770	702,208	33,438	5%
General & Administrative						
7025 · Office Supplies	9,891	7,499	9,601	9,601	-	0%
7033 · Operating Meeting Supplies	-	-	366	366	-	0%
7035 · Postage/Mailing, net	1,100	1,105	917	917	-	0%
7040 · Copy/Printing Expense	7,156	2,929	3,364	3,364	-	0%
7050 · Computer Maintenance	4,707	4,707	4,707	4,707	-	0%
7055 · Computer Supplies & Small Equip	282	291	615	615	-	0%
7089 · Membership Database Fees	-	1,151	59	59	-	0%
7095 · Fax Equip & Supplies	-	(67)	3	3	-	0%
7100 · Telephone	4,490	5,274	6,701	6,701	-	0%
7105 · Advertising	-	-	460	460	-	0%
7110 · Publications/Subscriptions	-	2,510	2,273	2,273	-	0%
7120 · Membership/Dues	2,478	3,794	2,894	2,894	-	0%
7135 · Bank Service Charges	1,655	1,178	1,107	1,107	-	0%
7136 · ILM Service Charges	15,289	16,892	16,298	16,298	-	0%
7140 · Credit Card Merchant Fees	(1,670)	(1,642)	(1,033)	(1,033)	-	0%
7150 · E&O/Off & Dir Insurance	8,757	9,184	9,335	9,500	165	2%

Utah State Bar
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Based on Actual Results through 3/31/19
04 - Bar Management

	Actual FY 2017	Actual FY 2018	Projected FY 2019	Draft Budget FY 2020	\$ Change 2019 Projected vs 2020 Budget	% Change 2019 Projected vs 2020 Budget
7160 • Audlt Expense	29,539	31,363	33,546	34,000	454	1%
7175 • O/S Consultants	9,661	11,195	13,516	14,000	484	4%
7179 • Payroll Adm Fees	2,819	2,826	2,853	2,853	-	0%
7180 • Administrative Fee Expense	1,037	1,176	877	877	-	0%
7190 • Lease Interest Expense	209	701	701	701	-	0%
7195 • Other Gen & Adm Expense	6,364	2,016	9,235	9,235	-	0%
Total General & Administrative Expenses	103,764	104,141	118,393	119,496	1,103	1%
In Kind Expenses						
7103 • InKind Contrib-UDR & all other	3,211	3,689	5,000	5,000	-	0%
Building Overhead						
6015 • Janitorial Expense	1,740	2,024	2,411	2,483	72	3%
6020 • Heat	1,015	1,493	1,738	1,790	52	3%
6025 • Electricity	2,780	2,964	3,683	3,793	110	3%
6030 • Water/Sewer	298	355	591	609	18	3%
6035 • Outside Maintenance	795	945	1,104	1,137	33	3%
6040 • Building Repairs	1,875	710	1,637	1,687	49	3%
6045 • Bldg Mtncn Contracts	2,197	2,610	2,780	2,863	83	3%
6050 • Bldg Mtncn Supplies	138	395	358	369	11	3%
6065 • Bldg Insurance/Fees	927	1,111	1,379	1,421	41	3%
6070 • Building & Improvements Depre	3,033	3,488	4,239	4,366	127	3%
6075 • Furniture & Fixtures Depre	886	1,053	1,147	1,181	34	3%
7065 • Computers, Equip & Sftwre Depr	10,026	11,939	14,048	14,469	421	3%
Total Building Overhead Expenses	25,711	29,087	35,115	36,168	1,053	3%
Total Expenses	809,700	819,329	835,535	922,140	86,605	10%
Other Income/Expense						
4300 • Gain (Loss) - Sales of Assets	-	-	-	-	-	-
Net Profit (Loss)	\$ (720,096)	\$ (682,600)	\$ (624,974)	\$ (711,579)	\$ (86,605)	14%

Utah State Bar
Preliminary FY2019 Budget
Based on Actual Results through 3/31/19
05 - Property Management

	Actual FY 2017	Actual FY 2018	Projected FY 2019	Draft Budget FY 2020	\$ Change 2019 Projected vs 2020 Budget	% Change 2019 Projected vs 2020 Budget
Revenue						
4039 · Room Rental-All parties	114,573	109,925	100,535	110,000	9,465	9%
4042 · Food & Beverage Rev-All Parties	122,983	115,796	116,994	115,800	(1,194)	-1%
4043 · Setup & A/V charges-All parties	2,072	1,044	1,195	1,000	(195)	-16%
4090 · Tenant Rent	21,672	21,672	21,086	21,700	614	3%
4095 · Miscellaneous Income	340	105	80	100	20	25%
Total Revenue	261,640	248,542	239,890	248,600	8,710	4%
Expenses						
Program Services						
5002 · Meeting facility-internal only	95	-	95	95	-	0%
5070 · Equipment Rental	1,972	844	1,100	1,100	-	0%
5075 · Food & Bev-external costs only	106,523	103,858	104,999	104,999	-	0%
5079 · Soft Drinks	8,311	6,907	7,334	7,334	-	0%
5090 · Commission Expense	-	-	656	656	-	0%
Total Program Services Expenses	116,900	112,590	114,185	114,185	-	0%
Salaries & Benefits						
5510 · Salaries/Wages	112,651	109,616	107,974	113,373	5,399	5%
5605 · Payroll Taxes	9,075	8,827	8,474	8,898	424	5%
5610 · Health Insurance	14,783	15,978	16,284	17,098	814	5%
5620 · Health Ins/Medical Reimb	-	555	1,118	1,174	56	5%
5630 · Dental Insurance	887	858	857	900	43	5%
5640 · Life & LTD Insurance	727	701	696	731	35	5%
5650 · Retirement Plan Contributions	10,146	10,156	9,966	10,464	498	5%
5655 · Retirement Plan Fees & Costs	1,403	1,420	1,014	1,034	20	2%
5660 · Training/Development	950	600	90	92	2	2%
Total Salaries/Benefit Expenses	150,622	148,711	146,473	153,764	7,291	5%
General & Administrative						
7025 · Office Supplies	1,243	866	1,595	1,595	-	0%
7033 · Operating Meeting Supplies	21,883	21,998	22,789	22,789	-	0%
7035 · Postage/Mailing, net	164	2,060	3,649	3,649	-	0%
7040 · Copy/Printing Expense	3,892	3,650	3,754	3,754	-	0%
7041 · Copy/Print revenue	(24,797)	(26,262)	(26,249)	(26,249)	-	0%
7055 · Computer Supplies & Small Equip	-	471	603	603	-	0%
7100 · Telephone	7,263	5,259	4,091	4,091	-	0%
7105 · Advertising	-	-	75	75	-	0%
7175 · O/S Consultants	-	-	227	227	-	0%
Total General & Administrative Expenses	10,267	8,150	10,535	10,535	-	0%
In Kind Expenses						
7103 · InKind Contrib-UDR & all other	19,671	16,828	15,277	15,277	-	0%
Building Overhead						
6015 · Janitorial Expense	15,249	15,342	15,288	15,747	459	3%
6020 · Heat	8,898	11,007	11,020	11,351	331	3%
6025 · Electricity	24,368	22,462	23,352	24,052	701	3%
6030 · Water/Sewer	2,612	2,758	3,746	3,859	112	3%
6035 · Outside Maintenance	6,970	6,363	6,999	7,209	210	3%
6040 · Building Repairs	16,436	5,103	10,383	10,694	311	3%
6045 · Bldg Mtnce Contracts	19,261	19,750	17,628	18,156	529	3%
6050 · Bldg Mtnce Supplies	1,211	2,694	2,273	2,341	68	3%
6055 · Real Property Taxes	15,066	14,883	13,104	13,497	393	3%
6060 · Personal Property Taxes	290	196	178	184	5	3%
6065 · Bldg Insurance/Fees	8,128	8,391	8,745	9,007	262	3%
6070 · Building & Improvements Depr	26,584	26,327	26,877	27,684	806	3%
6075 · Furniture & Fixtures Depr	7,771	7,944	7,272	7,490	218	3%
7065 · Computers, Equip & Sftwre Depr	84,196	89,696	89,078	91,750	2,672	3%
Total Building Overhead Expenses	237,040	232,915	235,944	243,022	7,078	3%
Total Expenses	534,500	519,194	522,413	536,782	14,369	3%
Net Profit (Loss)	\$ (272,860)	\$ (270,652)	\$ (282,523)	\$ (288,182)	\$ (5,659)	2%

Utah State Bar
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Based on Actual Results through 3/31/19
06 - Office of Prof Conduct

	Actual FY 2017	Actual FY 2018	Projected FY 2019	Draft Budget FY 2020	\$ Change 2019 Projected vs 2020 Budget	% Change 2019 Projected vs 2020 Budget
Revenue						
4095 · Miscellaneous Income	2,980	5,059	6,555	6,686	131	2%
4200 · Seminar Profit/Loss	13,761	16,229	24,557	20,000	(4,557)	-19%
Total Revenue	16,741	21,288	31,111	26,686	(4,425)	-14%
Expenses						
Program Services						
5015 · Investigations	10	-	88	89	2	2%
5040 · Witness & Hearing Expense	10,024	1,733	2,186	5,000	2,814	129%
5041 · Process Serving	1,518	656	1,462	1,491	29	2%
5046 · Court Reporting	567	152	-	500	500	#DIV/0!
5075 · Food & Bev-external costs only	54	-	659	672	13	2%
5085 · Misc. Program Expense	-	420	240	245	5	2%
5702 · Travel - Lodging	6,422	3,911	6,076	6,197	122	2%
5703 · Travel - Transportation/Parking	1,760	1,768	2,892	2,950	58	2%
5704 · Travel - Mileage Reimbursement	733	1,309	2,566	2,617	51	2%
5705 · Travel - Per Diems	600	684	1,280	1,306	26	2%
5805 · ABA Annual Meeting	-	5,866	6,149	6,149	-	0%
5810 · ABA Mid Year Meeting	1,837	7,197	2,364	2,364	-	0%
Total Program Services Expenses	24,485	24,347	25,962	29,581	3,619	14%
Salaries & Benefits						
5510 · Salaries/Wages	863,085	881,043	919,372	965,341	45,969	5%
5605 · Payroll Taxes	64,118	64,622	68,072	71,475	3,404	5%
5610 · Health Insurance	83,981	78,987	76,504	80,329	3,825	5%
5620 · Health Ins/Medical Reimb	-	941	1,242	1,304	62	5%
5630 · Dental Insurance	5,948	5,682	5,934	6,231	297	5%
5640 · Life & LTD Insurance	5,961	5,624	5,621	5,902	281	5%
5650 · Retirement Plan Contributions	83,557	78,849	83,448	87,621	4,172	5%
5655 · Retirement Plan Fees & Costs	6,838	6,558	4,896	5,141	245	5%
5660 · Training/Development	8,573	6,385	5,540	10,000	4,460	81%
Total Salaries/Benefit Expenses	1,122,060	1,128,691	1,170,629	1,233,344	62,714	5%
General & Administrative						
7025 · Office Supplies	5,386	5,135	5,514	5,514	-	0%
7035 · Postage/Mailing, net	5,646	5,630	5,310	5,310	-	0%
7040 · Copy/Printing Expense	15,688	14,665	13,850	13,850	-	0%
7045 · Internet Service	-	-	72	72	-	0%
7050 · Computer Maintenance	2,824	2,824	3,154	3,249	95	3%
7055 · Computer Supplies & Small Equip	924	589	1,648	1,697	49	3%
7089 · Membership Database Fees	6,848	8,087	11,133	11,133	-	0%
7100 · Telephone	15,833	12,937	12,660	12,660	-	0%
7105 · Advertising	75	360	225	225	-	0%
7106 · Public Notification	703	608	1,225	1,225	-	0%
7110 · Publications/Subscriptions	11,239	10,328	10,380	10,380	-	0%
7120 · Membership/Dues	4,520	4,810	4,800	4,800	-	0%
7150 · E&O/Off & Dir Insurance	13,861	14,253	14,309	14,738	429	3%
7175 · O/S Consultants	-	-	1,365	21,365	20,000	1466%
7178 · Offsite Storage/Backup	3,995	4,228	4,681	4,681	-	0%
7195 · Other Gen & Adm Expense	800	-	285	285	-	0%
Total General & Administrative Expenses	88,585	85,437	90,612	111,186	20,574	23%
Building Overhead						
6015 · Janitorial Expense	6,280	6,037	5,611	5,779	168	3%
6020 · Heat	3,664	4,275	4,044	4,166	121	3%
6025 · Electricity	10,035	8,838	8,570	8,827	257	3%
6030 · Water/Sewer	1,076	1,095	1,375	1,416	41	3%
6035 · Outside Maintenance	2,871	2,395	2,569	2,646	77	3%
6040 · Building Repairs	6,769	1,970	3,811	3,925	114	3%
6045 · Bldg Mtnce Contracts	7,932	7,767	6,469	6,663	194	3%
6050 · Bldg Mtnce Supplies	499	1,019	834	859	25	3%

Utah State Bar
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06 - Office of Prof Conduct

	Actual FY 2017	Actual FY 2018	Projected FY 2019	Draft Budget FY 2020	\$ Change 2019 Projected vs 2020 Budget	% Change 2019 Projected vs 2020 Budget
6065 · Bldg Insurance/Fees	3,348	3,298	3,209	3,306	96	3%
6070 · Building & Improvements Depre	10,948	10,344	9,864	10,160	296	3%
6075 · Furniture & Fixtures Depre	3,200	3,121	2,669	2,749	80	3%
7065 · Computers, Equip & Sftwre Depre	34,674	35,185	32,692	33,673	981	3%
Total Building Overhead Expenses	91,295	85,342	81,717	84,169	2,452	3%
Total Expenses	1,326,424	1,323,817	1,368,920	1,458,279	89,359	7%
Net Profit (Loss)	\$ (1,309,683)	\$ (1,302,529)	\$ (1,337,809)	\$ (1,431,594)	\$ (93,784)	7%

NOTES TO OPC BUDGET:

1 The following computer or IT maintenance contracts have been included in the FY 19/20 budget above for account 7050 · Computer Maintenance and account 7175 · O/S Consultants

Vendor/Contract	Amount	Purpose
Braintrace	\$668/month	Threat traffic monitoring
Euclid	\$236/month	Annual maintenance
ClearLink	\$1,417/month	Computer virus protection, routine computer updates and server, workstation & network maintenance
ClearLink	\$88/quarter	Vulnerability scans
ClearLink	\$1,188/year	Firewall maintenance
ClearLink	\$540/month	Office 365 Windows subscription

2 The Bar currently pays the monthly contract for Office 365 Windows monthly support totaling \$1,067/month, of which approximately \$351 relates to OPC.

3 No major software upgrades are expect for the FY 19/20 for OPC.

4 The \$20,000 increase in FY 19/20 Budget in account 7175 · O/S Consultants above relates to expected website costs related the OPC website that will be created to separate OPC from the Bar's website

5 For FY 19/20, the following computer/hardware purchases are expected and will be capitalized:

Item	Amount
3 computers/laptops	\$ 6,500
printer	\$ 3,000

6 Each year, the Bar anticipates an operational reserve of \$200,000. Of that reserve, \$25,000 has been allocated to OPC.

7 Approximately 50% of the The General Counsel Assistant's time is spent on disciplinary matters, which totals approximately \$22,700 per year. Currently, the entire cost is charged to the General Counsel department and no expense related to the General Counsel Assistant is charged to OPC.

8 Any disciplinary-related expenses billed to General Counsel remain as a General Counsel expense and are not charged to OPC.

Utah State Bar
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Based on Actual Results through 3/31/19
07 - General Counsel

	Actual FY 2017	Actual FY 2018	Projected FY 2019	Draft Budget FY 2020	\$ Change 2019 Projected vs 2020 Budget	% Change 2019 Projected vs 2020 Budget
Expenses						
Program Services						
5002 · Meeting facility-internal only	4,610	5,420	4,985	5,085	100	2%
5015 · Investigations	46	110	58	59	1	2%
5040 · Witness & Hearing Expense	(690)	(1,095)	(525)	(536)	(11)	2%
5076 · Food & beverage - internal only	2,726	2,760	2,731	2,786	55	2%
5703 · Travel - Transportation/Parking	528	1,759	888	905	18	2%
5704 · Travel - Mileage Reimbursement	-	357	332	339	7	2%
5805 · ABA Annual Meeting	-	3,335	1,767	1,767	-	0%
Total Program Services Expenses	9,971	15,649	10,237	10,406	169	2%
Salaries & Benefits						
5510 · Salaries/Wages	164,823	185,715	186,125	195,432	9,306	5%
5605 · Payroll Taxes	12,012	13,120	13,482	14,156	674	5%
5610 · Health Insurance	12,263	12,456	13,772	14,461	689	5%
5620 · Health Ins/Medical Reimb	-	3	7	8	0	5%
5630 · Dental Insurance	443	429	428	450	21	5%
5640 · Life & LTD Insurance	1,126	1,099	1,094	1,149	55	5%
5650 · Retirement Plan Contributions	15,402	18,072	18,539	19,466	927	5%
5655 · Retirement Plan Fees & Costs	1,214	1,420	1,014	1,065	51	5%
5660 · Training/Development	1,245	800	1,350	1,418	68	5%
Total Salaries/Benefit Expenses	208,528	233,114	235,812	247,602	11,791	5%
General & Administrative						
7025 · Office Supplies	220	304	184	184	-	0%
7035 · Postage/Mailing, net	758	487	359	359	-	0%
7040 · Copy/Printing Expense	1,760	1,338	2,026	2,026	-	0%
7045 · Internet Service	-	-	398	406	8	2%
7050 · Computer Maintenance	1,883	1,883	1,883	1,939	56	3%
7055 · Computer Supplies & Small Equip	2,751	2,660	1,934	1,992	58	3%
7089 · Membership Database Fees	-	-	195	195	-	0%
7100 · Telephone	2,639	2,233	2,276	2,276	-	0%
7106 · Public Notification	160	-	-	-	-	0%
7110 · Publications/Subscriptions	1,621	1,892	2,202	2,202	-	0%
7120 · Membership/Dues	669	820	845	845	-	0%
7150 · E&O/Off & Dir Insurance	3,960	4,072	4,088	4,211	123	3%
7175 · O/S Consultants	-	-	227	232	5	2%
7176 · Bar Litigation	22,450	22,356	25,000	25,000	-	0%
7177 · UPL	8,297	1,139	3,960	3,960	-	0%
Total General & Administrative Expenses	47,168	39,184	45,577	45,827	250	1%
Building Overhead						
6015 · Janitorial Expense	1,209	1,065	844	870	25	3%
6020 · Heat	705	738	609	627	18	3%
6025 · Electricity	1,932	1,559	1,289	1,328	39	3%
6030 · Water/Sewer	207	197	207	213	6	3%
6035 · Outside Maintenance	553	383	386	398	12	3%
6040 · Building Repairs	1,303	334	573	591	17	3%
6045 · Bldg Mtncn Contracts	1,527	1,369	973	1,003	29	3%
6050 · Bldg Mtncn Supplies	96	165	126	129	4	3%
6065 · Bldg Insurance/Fees	644	580	483	497	14	3%
6070 · Building & Improvements Depre	2,108	1,820	1,484	1,529	45	3%
6075 · Furniture & Fixtures Depre	616	549	402	414	12	3%
7065 · Computers, Equip & Sftwre Depre	6,675	6,170	4,919	5,066	148	3%
Total Building Overhead Expenses	17,575	14,929	12,295	12,664	369	3%
Total Expenses	283,242	302,876	303,921	316,499	12,578	4%
Net Profit (Loss)	\$ (283,242)	\$ (302,876)	\$ (303,921)	\$ (316,499)	\$ (12,578)	4%

Utah State Bar
Preliminary FY2019 Budget
Based on Actual Results through 3/31/19
08 - Computer/MIS/Internet

	Actual FY 2017	Actual FY 2018	Projected FY 2019	Draft Budget FY 2020	\$ Change 2019 Projected vs 2020 Budget	% Change 2019 Projected vs 2020 Budget
Expenses						
Program Services						
5075 · Food & Bev-external costs only	116	-	889	906	18	
5702 · Travel - Lodging	3,639	432	1,787	1,823	36	2%
5703 · Travel - Transportation/Parking	2,819	1,517	1,407	1,435	28	2%
5704 · Travel - Mileage Reimbursement	-	-	216	221	4	2%
5705 · Travel - Per Diems	-	-	652	665	13	2%
5706 · Travel - Meals	-	-	17	17	0	2%
5707 · Travel - Commission Mtgs	-	-	18	18	0	2%
Total Program Services Expenses	6,574	1,949	5,567	5,667	100	2%
Salaries & Benefits						
5510 · Salaries/Wages	121,582	120,436	126,147	132,454	6,307	5%
5605 · Payroll Taxes	8,766	9,744	10,821	11,363	541	5%
5610 · Health Insurance	11,544	11,835	15,408	16,178	770	5%
5630 · Dental Insurance	850	787	611	641	31	5%
5640 · Life & LTD Insurance	968	874	852	895	43	5%
5650 · Retirement Plan Contributions	8,985	12,925	4,651	4,884	233	5%
5655 · Retirement Plan Fees & Costs	891	1,420	511	522	10	2%
5660 · Training/Development	3,825	1,745	5,496	5,606	110	2%
Total Salaries/Benefit Expenses	157,410	159,765	164,498	172,543	8,045	5%
General & Administrative						
7025 · Office Supplies	2,304	1,646	2,050	2,050	-	0%
7040 · Copy/Printing Expense	85	-	32	32	-	0%
7045 · Internet Service	11,944	14,360	3,595	3,595	-	0%
7050 · Computer Maintenance	1,883	1,883	8,928	9,196	268	3%
7055 · Computer Supplies & Small Equip	2,054	1,605	4,120	4,244	124	3%
7089 · Membership Database Fees	3,107	12,751	8,901	8,901	-	0%
7100 · Telephone	3,766	2,662	4,545	4,545	-	0%
7105 · Advertising	75	538	538	538	-	0%
7110 · Publications/Subscriptions	2,205	1,856	1,988	1,988	-	0%
7120 · Membership/Dues	227	231	350	350	-	0%
7175 · O/S Consultants	23,055	94,192	75,516	75,516	-	0%
Total General & Administrative Expenses	50,706	132,300	111,302	111,693	391	0%
Building Overhead						
6015 · Janitorial Expense	576	696	861	886	26	3%
6020 · Heat	336	517	620	639	19	3%
6025 · Electricity	920	1,019	1,314	1,354	39	3%
6030 · Water/Sewer	99	121	211	217	6	3%
6035 · Outside Maintenance	263	334	394	406	12	3%
6040 · Building Repairs	621	247	584	602	18	3%
6045 · Bldg Mtnce Contracts	727	897	992	1,022	30	3%
6050 · Bldg Mtnce Supplies	46	139	128	132	4	3%
6065 · Bldg Insurance/Fees	307	382	492	507	15	3%
6070 · Building & Improvements Depre	1,004	1,200	1,513	1,558	45	3%
6075 · Furniture & Fixtures Depre	293	362	409	422	12	3%
7065 · Computers, Equip & Sftwre Depr	3,179	4,112	5,014	5,165	150	3%
Total Building Overhead Expenses	8,371	10,026	12,533	12,909	376	3%
Total Expenses	223,061	304,039	293,901	302,813	8,912	3%
Net Profit (Loss)	\$ (223,061)	\$ (304,039)	\$ (293,901)	\$ (302,813)	\$ (8,912)	3%

Utah State Bar
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Based on Actual Results through 3/31/19
CLE

	Actual FY 2017	Actual FY 2018	Projected FY 2019	Draft Budget FY 2020	\$ Change 2019 Projected vs 2020 Budget	% Change 2019 Projected vs 2020 Budget
Revenue						
4052 - Meeting - Sponsor Revenue	16,750	15,500	17,000	15,000	(2,000)	-12%
4053 - Meeting - Vendor Revenue	-	-	1,000	1,000	-	0%
4054 - Meeting - Material Sales	-	2,185	-	-	-	0%
4081 - CLE - Registrations	491,151	467,772	465,908	470,000	4,093	1%
4082 - CLE - Video Library Sales	107,592	98,348	87,128	90,000	2,872	3%
4084 - Business Law Book Sales	9,753	6,856	6,552	-	(6,552)	-100%
4095 - Miscellaneous Income	11,951	45	45	-	(45)	-100%
4200 - Seminar Profit/Loss	(56,159)	(25,626)	(16,183)	(10,000)	6,183	-38%
Total Revenue	581,039	565,080	561,449	566,000	4,551	1%
Expenses						
Program Services						
5001 - Meeting Facility-external only	14,659	10,459	10,120	11,000	880	9%
5002 - Meeting facility-internal only	9,783	8,220	7,015	8,000	985	14%
5030 - Speaker Fees & Expenses	14,631	16,155	6,905	18,000	11,095	161%
5031 - Speaker Reimb. - Receipt Req'd	5,758	17,411	12,633	15,000	2,367	19%
5035 - Awards	3,144	1,763	2,001	2,000	(1)	0%
5063 - Special Event Expense	9,991	18,057	18,401	18,000	(401)	-2%
5064 - MCLE Fees Paid	29,506	29,372	37,982	30,000	(7,982)	-21%
5070 - Equipment Rental	7,503	16,896	12,878	15,000	2,122	16%
5075 - Food & Bev-external costs only	112,122	179,000	169,396	140,000	(29,396)	-17%
5076 - Food & beverage - internal only	28,420	19,164	21,167	22,000	833	4%
5085 - Misc. Program Expense	5,737	3,856	3,296	4,000	704	21%
5702 - Travel - Lodging	5,939	7,958	20,238	20,000	(238)	-1%
5703 - Travel - Transportation/Parking	2,871	202	4,935	4,000	(935)	-19%
5704 - Travel - Mileage Reimbursement	2,023	735	490	1,000	510	104%
5706 - Travel - Meals	78	-	78	-	(78)	-100%
5815 - Commission/Education	-	-	214	214	-	0%
5841 - President's Reimbursement	-	-	191	191	-	0%
5960 - Overhead Allocation - Seminars	(24,685)	(26,624)	(15,750)	(20,000)	(4,250)	27%
5970 - Event Revenue Sharing - 3rd Pty	68,682	64,158	70,978	71,000	22	0%
Total Program Services Expenses	296,870	369,932	383,166	359,405	(23,762)	-6%
Salaries & Benefits						
5510 - Salaries/Wages	83,541	100,837	94,146	103,000	8,854	9%
5605 - Payroll Taxes	6,710	8,922	7,560	8,600	1,040	14%
5610 - Health Insurance	16,330	12,982	10,416	12,000	1,584	15%
5620 - Health Ins/Medical Reimb	-	11	16	-	(16)	-100%
5630 - Dental Insurance	887	576	428	500	72	17%
5640 - Life & LTD Insurance	888	799	763	800	37	5%
5650 - Retirement Plan Contributions	8,271	7,603	5,879	6,000	121	2%
5655 - Retirement Plan Fees & Costs	1,403	1,072	671	750	79	12%
5660 - Training/Development	2,200	1,500	1,090	1,100	10	1%
Total Salaries/Benefit Expenses	120,230	134,302	120,970	132,750	11,780	10%
General & Administrative						
7025 - Office Supplies	805	1,266	2,245	1,500	(745)	-33%
7033 - Operating Meeting Supplies	44	-	-	-	-	-
7035 - Postage/Mailing, net	2,959	8,071	6,925	7,000	75	1%
7040 - Copy/Printing Expense	19,707	26,107	17,950	23,000	5,050	28%
7045 - Internet Service	234	72	196	200	4	2%
7050 - Computer Maintenance	1,883	1,883	3,054	3,000	(54)	-2%
7055 - Computer Supplies & Small Equip	979	883	3,435	3,500	65	2%
7089 - Membership Database Fees	2,789	2,633	176	1,500	1,325	755%
7100 - Telephone	3,668	2,592	2,496	2,600	104	4%
7105 - Advertising	-	1,150	75	500	425	567%
7120 - Membership/Dues	255	561	606	650	44	7%
7135 - Bank Service Charges	-	118	118	150	32	28%
7140 - Credit Card Merchant Fees	12,256	12,566	13,385	13,000	(385)	-3%
7175 - O/S Consultants	125	2,000	227	200	(27)	-12%
7195 - Other Gen & Adm Expense	66	180	827	1,000	173	21%

Utah State Bar
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Based on Actual Results through 3/31/19
CLE

	Actual FY 2017	Actual FY 2018	Projected FY 2019	Draft Budget FY 2020	\$ Change 2019 Projected vs 2020 Budget	% Change 2019 Projected vs 2020 Budget
Total General & Administrative Expenses	45,769	60,080	51,715	57,800	6,085	12%
Building Overhead						
6015 · Janitorial Expense	874	680	391	403	12	3%
6020 · Heat	510	455	282	290	8	3%
6025 · Electricity	1,397	995	597	615	18	3%
6030 · Water/Sewer	150	129	96	99	3	3%
6035 · Outside Maintenance	400	205	179	184	5	3%
6040 · Building Repairs	942	199	265	273	8	3%
6045 · Bldg Mtncn Contracts	1,104	872	451	464	14	3%
6050 · Bldg Mtncn Supplies	69	91	58	60	2	3%
6055 · Real Property Taxes	11,299	11,162	9,828	10,123	295	3%
6060 · Personal Property Taxes	218	147	134	138	4	3%
6065 · Bldg Insurance/Fees	466	369	224	230	7	3%
6070 · Building & Improvements Depr	1,524	1,157	687	708	21	3%
6075 · Furniture & Fixtures Depr	446	348	186	191	6	3%
7065 · Computers, Equip & Sftwre Depr	4,827	3,900	2,277	2,346	68	3%
Total Building Overhead Expenses	24,227	20,709	15,655	16,124	470	3%
Total Expenses	487,096	585,023	571,506	566,079	(5,427)	-1%
Net Profit (Loss)	\$ 93,942	\$ (19,942)	\$ (10,057)	\$ (79)	\$ 9,978	-99%

Utah State Bar
Preliminary FY2019 Budget
Based on Actual Results through 3/31/19
10 - Summer Convention

	Actual FY 2017	Actual FY 2018	Projected FY 2019	Draft Budget FY 2020	\$ Change 2019 Projected vs 2020 Budget	% Change 2019 Projected vs 2020 Budget
Revenue						
4051 · Meeting - Registration	157,372	234,820	235,000	215,000	(20,000)	-9%
4052 · Meeting - Sponsor Revenue	20,000	20,550	25,500	25,500	-	0%
4053 · Meeting - Vendor Revenue	10,600	13,100	9,800	10,000	200	2%
4054 · Meeting - Material Sales	-	-	-	-	-	-
4055 · Meeting - Sp Ev Registration	1,800	14,810	16,010	15,500	(510)	-3%
4095 · Miscellaneous Income	-	-	-	-	-	-
Total Revenue	189,772	283,280	286,310	266,000	(20,310)	-7%
Expenses						
Program Services						
5001 · Meeting Facility-external only	-	6,134	7,406	6,200	(1,206)	-
5002 · Meeting facility-internal only	1,080	870	760	800	40	5%
5030 · Speaker Fees & Expenses	-	7,465	1,895	5,000	3,105	-
5031 · Speaker Reimb. - Receipt Req'd	1,163	741	368	400	32	9%
5063 · Special Event Expense	2,399	56,773	59,738	60,000	262	0%
5064 · MCLE Fees Paid	4,094	5,347	3,866	5,000	1,135	29%
5070 · Equipment Rental	26,731	9,149	14,120	10,000	(4,120)	-29%
5075 · Food & Bev-external costs only	102,679	109,154	96,975	102,000	5,025	5%
5076 · Food & beverage - internal only	2,657	2,133	1,704	1,500	(204)	-12%
5085 · Misc. Program Expense	1,358	227	11	100	89	837%
5702 · Travel - Lodging	5,190	18,191	11,933	12,000	67	1%
5704 · Travel - Mileage Reimbursement	231	2,838	5,111	1,000	(4,111)	-80%
5960 · Overhead Allocation - Seminars	20,000	20,000	20,000	20,000	-	0%
Total Program Services Expenses	169,341	240,660	223,887	224,000	113	0%
Salaries & Benefits						
5510 · Salaries/Wages	19,385	20,964	18,024	18,925	901	5%
5605 · Payroll Taxes	1,437	1,560	1,350	1,417	67	5%
5650 · Retirement Plan Contributions	1,933	1,784	1,429	1,501	71	5%
Total Salaries/Benefit Expenses	22,755	24,308	20,805	21,845	1,040	5%
General & Administrative						
7025 · Office Supplies	130	662	78	78	-	-
7035 · Postage/Mailing, net	34	7	2	2	-	0%
7040 · Copy/Printing Expense	6,515	6,881	6,801	6,801	-	0%
7045 · Internet Service	45	-	125	125	-	-
7055 · Computer Supplies & Small Equip	-	-	-	-	-	-
7089 · Membership Database Fees	4,000	4,000	4,000	4,000	-	0%
7100 · Telephone	628	324	95	95	-	0%
7140 · Credit Card Merchant Fees	3,271	5,700	5,763	5,763	-	0%
7195 · Other Gen & Adm Expense	66	-	-	-	-	0%
Total General & Administrative Expenses	14,689	17,679	16,991	16,993	3	0%
Building Overhead						
6015 · Janitorial Expense	175	104	-	104	104	#DIV/0!
6020 · Heat	102	63	-	63	63	#DIV/0!
6025 · Electricity	279	152	-	152	152	#DIV/0!
6030 · Water/Sewer	30	21	-	21	21	#DIV/0!
6035 · Outside Maintenance	80	15	-	15	15	#DIV/0!
6040 · Building Repairs	188	25	-	25	25	#DIV/0!
6045 · Bldg Mtncn Contracts	221	133	-	133	133	#DIV/0!
6050 · Bldg Mtncn Supplies	14	8	-	8	8	#DIV/0!
6065 · Bldg Insurance/Fees	93	56	-	56	56	#DIV/0!
6070 · Building & Improvements Depre	305	175	-	175	175	#DIV/0!
6075 · Furniture & Fixtures Depre	89	52	-	52	52	#DIV/0!
7065 · Computers, Equip & Sftwre Depre	965	580	-	580	580	#DIV/0!
Total Building Overhead Expenses	2,542	1,383	-	1,383	1,383	#DIV/0!
Total Expenses	209,328	284,030	261,682	265,605	2,539	1%
Net Profit (Loss)	\$ (19,556)	\$ (750)	\$ 24,628	\$ 395	\$ (22,849)	-93%

Utah State Bar
Preliminary FY2019 Budget
Based on Actual Results through 3/31/19
11 - Fall Forum

	Actual FY 2017	Actual FY 2018	Projected FY 2019	Draft Budget FY 2020	\$ Change 2019 Projected vs 2020 Budget	% Change 2019 Projected vs 2020 Budget
Revenue						
4051 · Meeting - Registration	107,211	73,178	73,178	74,000	822	1%
4053 · Meeting - Vendor Revenue	12,025	10,150	6,400	6,400	-	0%
Total Revenue	129,611	83,328	79,578	80,400	822	1%
Expenses						
Program Services						
5001 · Meeting Facility-external only	3,200	3,825	-	-	-	0%
5002 · Meeting facility-internal only	285	190	-	-	-	0%
5030 · Speaker Fees & Expenses	36,710	5,460	1,605	1,600	(5)	0%
5031 · Speaker Reimb. - Receipt Req'd	652	387	866	866	(0)	0%
5046 · Court Reporting	-	-	2,920	-	(2,920)	-100%
5064 · MCLE Fees Paid	4,110	3,728	-	-	-	0%
5070 · Equipment Rental	11,992	6,804	7,501	6,500	(1,001)	-13%
5075 · Food & Bev-external costs only	59,879	31,850	34,757	34,000	(757)	-2%
5702 · Travel - Lodging	-	561	1,408	1,500	92	7%
5703 · Travel - Transportation/Parking	-	-	2	-	(2)	-
5960 · Overhead Allocation - Seminars	15,000	15,000	15,000	15,000	-	0%
5970 · Event Revenue Sharing - 3rd Pty	-	-	-	-	-	#DIV/0!
Total Program Services Expenses	132,761	68,108	64,058	59,466	(4,592)	-7%
Salaries & Benefits						
5510 · Salaries/Wages	11,458	9,247	7,423	7,795	371	5%
5605 · Payroll Taxes	846	717	560	588	28	5%
5650 · Retirement Plan Contributions	1,099	672	420	441	21	5%
Total Salaries/Benefit Expenses	13,403	10,636	8,406	8,826	420	5%
General & Administrative						
7025 · Office Supplies	130	-	282	287	6	2%
7035 · Postage/Mailing, net	75	-	-	-	-	0%
7040 · Copy/Printing Expense	5,431	5,006	4,460	4,400	(60)	-1%
7089 · Membership Database Fees	4,000	4,000	4,050	4,000	(50)	-1%
7100 · Telephone	406	198	18	18	(0)	-2%
7140 · Credit Card Merchant Fees	2,715	1,657	1,978	1,900	(78)	-4%
Total General & Administrative Expenses	12,823	10,862	11,236	11,062	(174)	-2%
Building Overhead						
6015 · Janitorial Expense	175	104	-	104	104	#DIV/0!
6020 · Heat	102	63	-	63	63	#DIV/0!
6025 · Electricity	279	152	-	152	152	#DIV/0!
6030 · Water/Sewer	30	21	-	21	21	#DIV/0!
6035 · Outside Maintenance	80	15	-	15	15	#DIV/0!
6040 · Building Repairs	188	25	-	25	25	#DIV/0!
6045 · Bldg Mtncn Contracts	221	133	-	133	133	#DIV/0!
6050 · Bldg Mtncn Supplies	14	8	-	8	8	#DIV/0!
6065 · Bldg Insurance/Fees	93	56	-	56	56	#DIV/0!
6070 · Building & Improvements Depre	305	175	-	175	175	#DIV/0!
6075 · Furniture & Fixtures Depre	89	52	-	52	52	#DIV/0!
7065 · Computers, Equip & Sftwre Depre	965	580	-	580	580	#DIV/0!
Total Building Overhead Expenses	2,542	1,383	-	1,383	1,383	#DIV/0!
Total Expenses	161,530	90,989	83,700	80,738	(2,962)	-4%
Net Profit (Loss)	\$ (31,919)	\$ (7,662)	\$ (4,122)	\$ (338)	\$ 3,784	-92%

Utah State Bar
Preliminary FY2019 Budget
Based on Actual Results through 3/31/19
12 - Spring Convention

	Actual FY 2017	Actual FY 2018	Projected FY 2019	Draft Budget FY 2020	\$ Change 2019 Projected vs 2020 Budget	% Change 2019 Projected vs 2020 Budget
Revenue						
4051 · Meeting - Registration	131,162	96,030	98,000	97,000	(1,000)	-1%
4052 · Meeting - Sponsor Revenue	18,650	15,850	16,000	15,000	(1,000)	-6%
4053 · Meeting - Vendor Revenue	12,000	9,600	9,600	9,000	(600)	-6%
4055 · Meeting - Sp Ev Registration	3,253	2,046	2,400	2,000	(400)	-17%
Total Revenue	165,065	123,526	126,000	123,000	(3,000)	-2%
Expenses						
Program Services						
5001 · Meeting Facility-external only	6,922	7,842	8,005	8,000	(5)	0%
5002 · Meeting facility-internal only	605	380	350	1,000	650	186%
5031 · Speaker Reimb. - Receipt Req'd	-	1,988	1,679	2,000	321	19%
5063 · Special Event Expense	4,906	3,629	2,016	3,000	984	49%
5064 · MCLE Fees Paid	5,252	5,865	11,306	9,000	(2,306)	-20%
5070 · Equipment Rental	3,068	4,804	3,510	4,000	490	14%
5075 · Food & Bev-external costs only	33,316	31,727	34,773	32,000	(2,773)	-8%
5076 · Food & beverage - internal only	1,174	988	940	1,000	60	6%
5085 · Misc. Program Expense	88	-	25	-	(25)	-100%
5702 · Travel - Lodging	1,282	3,303	6,398	5,000	(1,398)	-22%
5704 · Travel - Mileage Reimbursement	1,935	2,953	2,868	3,000	132	5%
5705 · Travel - Per Diems	402	413	620	500	(120)	-19%
5960 · Overhead Allocation - Seminars	15,000	15,000	15,000	15,000	-	0%
Total Program Services Expenses	79,777	79,894	87,489	83,500	(3,989)	-5%
Salaries & Benefits						
5510 · Salaries/Wages	18,594	12,537	18,594	19,524	930	5%
5605 · Payroll Taxes	1,451	986	1,500	1,575	75	5%
5650 · Retirement Plan Contributions	1,786	871	1,850	1,943	93	5%
Total Salaries/Benefit Expenses	21,831	14,402	21,957	23,054	1,098	5%
General & Administrative						
7025 · Office Supplies	849	163	849	1,000	151	18%
7040 · Copy/Printing Expense	6,263	5,585	5,289	5,500	211	4%
7089 · Membership Database Fees	4,000	4,000	4,000	4,000	-	0%
7140 · Credit Card Merchant Fees	3,058	2,256	3,392	3,500	108	3%
Total General & Administrative Expenses	15,152	12,241	13,656	14,128	472	3%
Building Overhead						
6015 · Janitorial Expense	175	104	-	104	104	#DIV/0!
6020 · Heat	102	63	-	63	63	#DIV/0!
6025 · Electricity	279	152	-	152	152	#DIV/0!
6030 · Water/Sewer	30	21	-	21	21	#DIV/0!
6035 · Outside Maintenance	80	15	-	15	15	#DIV/0!
6040 · Building Repairs	188	25	-	25	25	#DIV/0!
6045 · Bldg Mtnce Contracts	221	133	-	133	133	#DIV/0!
6050 · Bldg Mtnce Supplies	14	8	-	8	8	#DIV/0!
6065 · Bldg Insurance/Fees	93	56	-	56	56	#DIV/0!
6070 · Building & Improvements Depre	305	175	-	175	175	#DIV/0!
6075 · Furniture & Fixtures Depre	89	52	-	52	52	#DIV/0!
7065 · Computers, Equip & Sftwre Depr	965	580	-	580	580	#DIV/0!
Total Building Overhead Expenses	2,542	1,383	-	1,383	1,383	#DIV/0!
Total Expenses	119,303	107,920	123,101	123,448	(1,036)	-1%
Net Profit (Loss)	\$ 45,762	\$ 15,606	\$ 2,899	\$ (448)	\$ (1,964)	-68%

Utah State Bar
Preliminary FY2019 Budget
Based on Actual Results through 3/31/19
13 - Bar Journal

	Actual FY 2017	Actual FY 2018	Projected FY 2019	Draft Budget FY 2020	\$ Change 2019 Projected vs 2020 Budget	% Change 2019 Projected vs 2020 Budget
Revenue						
4061 · Advertising Revenue	138,837	148,172	181,492	181,492	-	0%
4062 · Subscriptions	60	60	90	90	-	0%
4071 · Mem Benefits - Lexis	1,167	696	1,455	1,455	-	0%
4072 · Royalty Inc - Bar J, MBNA, LM, M	6,734	6,073	6,185	6,185	-	0%
Total Revenue	146,797	155,076	189,248	189,248	0	0%
Expenses						
Program Services						
5002 · Meeting facility-internal only	1,045	1,140	1,045	1,045	-	0%
5075 · Food & Bev-external costs only	-	21	213	213	-	0%
5076 · Food & beverage - internal only	2,510	3,209	3,101	3,101	-	0%
5085 · Misc. Program Expense	21	-	-	-	-	0%
5090 · Commission Expense	25,814	28,655	26,000	26,520	520	2%
Total Program Services Expenses	29,390	33,025	30,359	30,879	520	2%
Salaries & Benefits						
5510 · Salaries/Wages	24,139	27,339	28,140	29,547	1,407	5%
5605 · Payroll Taxes	1,644	1,761	1,816	1,907	91	5%
5610 · Health Insurance	3,447	2,760	2,366	2,484	118	5%
5620 · Health Ins/Medical Reimb	-	1	3	3	0	5%
5630 · Dental Insurance	222	214	214	225	11	5%
5640 · Life & LTD Insurance	202	195	194	203	10	5%
5650 · Retirement Plan Contributions	2,383	2,734	2,912	3,057	146	5%
5655 · Retirement Plan Fees & Costs	351	355	254	266	13	5%
5660 · Training/Development	225	175	23	24	1	5%
Total Salaries/Benefit Expenses	32,612	35,535	35,921	37,717	1,796	5%
General & Administrative						
7035 · Postage/Mailing, net	29,321	30,149	31,582	31,582	-	0%
7040 · Copy/Printing Expense	70,142	76,117	76,429	76,429	-	0%
7045 · Internet Service	92	72	321	321	-	0%
7100 · Telephone	658	557	569	569	-	0%
7140 · Credit Card Merchant Fees	567	898	1,213	1,213	-	0%
7175 · O/S Consultants	-	-	114	114	-	0%
Total General & Administrative Expenses	100,793	107,793	110,228	110,228	-	0%
Building Overhead						
6015 · Janitorial Expense	115	141	177	182	5	3%
6020 · Heat	67	105	128	131	4	3%
6025 · Electricity	183	206	270	278	8	3%
6030 · Water/Sewer	20	24	43	45	1	3%
6035 · Outside Maintenance	52	68	81	83	2	3%
6040 · Building Repairs	124	50	120	124	4	3%
6045 · Bldg Mtncce Contracts	145	182	204	210	6	3%
6050 · Bldg Mtncce Supplies	9	28	26	27	1	3%
6065 · Bldg Insurance/Fees	61	77	101	104	3	3%
6070 · Building & Improvements Depre	200	243	311	320	9	3%
6075 · Furniture & Fixtures Depre	58	73	84	87	3	3%
7065 · Computers, Equip & Sftwre Depre	633	833	1,031	1,062	31	3%
Total Building Overhead Expenses	1,665	2,031	2,577	2,654	77	3%
Total Expenses	164,460	178,384	179,085	181,478	2,393	1%
Net Profit (Loss)	\$ (17,663)	\$ (23,308)	\$ 10,163	\$ 7,770	\$ (2,393)	-24%

Utah State Bar
Preliminary FY2019 Budget
Based on Actual Results through 3/31/19
14 - Committees

	Actual FY 2017	Actual FY 2018	Projected FY 2019	Draft Budget FY 2020	\$ Change 2019 Projected vs 2020 Budget	% Change 2019 Projected vs 2020 Budget
Revenue						
4093 · Law Day Revenue	3,540	3,570	3,870	3,870	-	0%
4095 · Miscellaneous Income	10	40	10	10	-	0%
Total Revenue	3,550	3,610	3,880	3,880	-	0%
Expenses						
Program Services						
5002 · Meeting facility-internal only	3,320	3,205	3,310	3,310	-	0%
5061 · LRE - Bar Support	65,000	65,000	65,000	65,000	-	0%
5062 · Law Day	6,245	11,439	8,000	7,815	(185)	-2%
5075 · Food & Bev-external costs only	-	-	92	92	-	0%
5076 · Food & beverage - internal only	3,892	4,666	5,099	5,099	-	0%
5085 · Misc. Program Expense	-	6	12	12	-	0%
5703 · Travel - Transportation/Parking	-	523	334	334	-	0%
5815 · Commission/Education	-	-	1,050	1,050	-	0%
5866 · Wellbeing Committee	-	-	10,000	50,000	40,000	400%
Total Program Services Expenses	88,483	84,840	92,896	132,711	39,815	43%
Salaries & Benefits						
5510 · Salaries/Wages	26,134	23,209	23,469	24,642	1,173	5%
5605 · Payroll Taxes	1,799	1,461	1,367	1,436	68	5%
5610 · Health Insurance	3,447	2,760	2,366	2,484	118	5%
5620 · Health Ins/Medical Reimb	-	3	7	7	0	5%
5630 · Dental Insurance	222	214	214	225	11	5%
5640 · Life & LTD Insurance	202	195	194	203	10	5%
5650 · Retirement Plan Contributions	2,586	2,247	2,191	2,300	110	5%
5655 · Retirement Plan Fees & Costs	351	355	254	266	13	5%
5660 · Training/Development	125	75	23	24	1	5%
Total Salaries/Benefit Expenses	34,866	30,519	30,084	31,588	1,504	5%
General & Administrative						
7025 · Office Supplies	11	38	35	35	-	0%
7035 · Postage/Mailing, net	143	167	311	311	-	0%
7040 · Copy/Printing Expense	381	1,671	1,524	1,524	-	0%
7045 · Internet Service	-	-	250	250	-	0%
7100 · Telephone	671	577	581	581	-	0%
Total General & Administrative Expenses	1,206	2,494	2,743	2,744	1	0%
Building Overhead						
6015 · Janitorial Expense	115	141	177	182	5	3%
6020 · Heat	67	105	128	131	4	3%
6025 · Electricity	183	206	270	278	8	3%
6030 · Water/Sewer	20	24	43	45	1	3%
6035 · Outside Maintenance	52	68	81	83	2	3%
6040 · Building Repairs	124	50	120	124	4	3%
6045 · Bldg Mtncn Contracts	145	182	204	210	6	3%
6050 · Bldg Mtncn Supplies	9	28	26	27	1	3%
6065 · Bldg Insurance/Fees	61	77	101	104	3	3%
6070 · Building & Improvements Depr	200	243	311	320	9	3%
6075 · Furniture & Fixtures Depr	58	73	84	87	3	3%
7065 · Computers, Equip & Sftwre Depr	633	833	1,031	1,062	31	3%
Total Building Overhead Expenses	1,665	2,031	2,577	2,654	77	3%
Total Expenses	126,220	119,884	128,300	169,697	41,397	32%
Net Profit (Loss)	\$ (122,670)	\$ (116,274)	\$ (124,420)	\$ (165,817)	\$ (41,397)	33%

Utah State Bar
Preliminary FY2019 Budget
Based on Actual Results through 3/31/19
15 - Member Benefits

	Actual FY 2017	Actual FY 2018	Projected FY 2019	Draft Budget FY 2020	\$ Change 2019 Projected vs 2020 Budget	% Change 2019 Projected vs 2020 Budget
Revenue						
4072 · Royalty Inc - Bar J, MBNA, LM,M	-	151	494	494	-	0%
4095 · Miscellaneous Income	-	-	5,000	5,000	-	0%
Total Revenue	-	151	5,494	5,494	-	0%
Expenses						
Program Services						
5047 · Casemaker	68,730	71,313	73,706	73,800	95	0%
5099 · Blomquist Hale	73,958	73,946	73,881	73,881	-	0%
Total Program Services Expenses	142,688	145,259	147,586	147,681	95	0%
Salaries & Benefits						
5510 · Salaries/Wages	331	544	293	308	15	5%
5605 · Payroll Taxes	23	40	18	19	1	5%
5650 · Retirement Plan Contributions	33	54	29	31	1	5%
Total Salaries/Benefit Expenses	388	638	340	357	17	5%
General & Administrative						
7089 · Membership Database Fees	-	2,750	-	-	-	0%
Total General & Administrative Expenses	-	2,750	-	-	-	0%
Total Expenses	144,610	149,481	147,926	148,038	111	0%
Net Profit (Loss)	\$ (144,610)	\$ (149,330)	\$ (142,432)	\$ (142,543)	\$ (111)	0%

Utah State Bar
Preliminary FY2019 Budget
Based on Actual Results through 3/31/19
16 - Section Support

	Actual FY 2017	Actual FY 2018	Projected FY 2019	Draft Budget FY 2020	\$ Change 2019 Projected vs 2020 Budget	% Change 2019 Projected vs 2020 Budget
Revenue						
4010 · Section/Local Bar Support fees	80,997	81,844	81,781	82,599	818	1%
Total Revenue	80,997	81,844	81,781	82,599	818	1%
Expenses						
Program Services						
5703 · Travel - Transportation/Parking	-	4	10	10	-	0%
Total Program Services Expenses	384	921	10	10	-	0%
Salaries & Benefits						
5510 · Salaries/Wages	47,071	49,251	52,507	55,133	2,625	5%
5605 · Payroll Taxes	3,916	3,991	4,268	4,482	213	5%
5610 · Health Insurance	4,439	4,193	7,778	8,167	389	5%
5620 · Health Ins/Medical Reimb	-	56	88	92	4	5%
5630 · Dental Insurance	407	429	393	413	20	5%
5640 · Life & LTD Insurance	306	317	274	287	14	5%
5650 · Retirement Plan Contributions	2,006	3,844	2,447	2,569	122	5%
5655 · Retirement Plan Fees & Costs	523	526	343	360	17	5%
5660 · Training/Development	650	250	45	47	2	5%
Total Salaries/Benefit Expenses	59,317	62,857	68,142	71,549	3,407	5%
General & Administrative						
7040 · Copy/Printing Expense	97	21	375	375	-	0%
7045 · Internet Service	-	2,907	6,054	6,054	-	0%
7050 · Computer Maintenance	941	941	941	941	-	0%
7100 · Telephone	1,317	1,115	1,138	1,138	-	0%
7175 · O/S Consultants	50	-	114	114	-	0%
Total General & Administrative Expenses	2,405	5,102	8,622	8,622	-	0%
Building Overhead						
6015 · Janitorial Expense	193	209	229	236	7	3%
6020 · Heat	113	152	165	170	5	3%
6025 · Electricity	308	306	350	361	11	3%
6030 · Water/Sewer	33	37	56	58	2	3%
6035 · Outside Maintenance	88	92	105	108	3	3%
6040 · Building Repairs	208	71	156	160	5	3%
6045 · Bldg Mtnc Contracts	244	269	264	272	8	3%
6050 · Bldg Mtnc Supplies	15	39	34	35	1	3%
6055 · Real Property Taxes	11,299	11,162	9,828	10,123	295	3%
6060 · Personal Property Taxes	218	147	134	138	4	3%
6065 · Bldg Insurance/Fees	103	114	131	135	4	3%
6070 · Building & Improvements Depr	336	359	403	415	12	3%
6075 · Furniture & Fixtures Depr	98	108	109	112	3	3%
7065 · Computers, Equip & Sftwre Depr	1,065	1,226	1,335	1,375	40	3%
Total Building Overhead Expenses	14,322	14,292	13,300	13,699	399	3%
Total Expenses	76,429	83,172	90,075	93,881	3,806	4%
Net Profit (Loss)	\$ 4,568	\$ (1,328)	\$ (8,294)	\$ (11,282)	\$ (2,988)	36%

Utah State Bar
Preliminary FY2019 Budget
Based on Actual Results through 3/31/19
17 - Consumer Assistance

	Actual FY 2017	Actual FY 2018	Projected FY 2019	Draft Budget FY 2020	\$ Change 2019 Projected vs 2020 Budget	% Change 2019 Projected vs 2020 Budget
Expenses						
Program Services						
5704 · Travel - Mileage Reimbursement	-	36	17	17	-	0%
Total Program Services Expenses	-	36	17	17	-	0%
Salaries & Benefits						
5510 · Salaries/Wages	90,413	93,608	91,936	96,533	4,597	5%
5605 · Payroll Taxes	6,004	6,180	6,327	6,644	316	5%
5610 · Health Insurance	8,351	10,396	11,112	11,668	556	5%
5630 · Dental Insurance	443	429	428	450	21	5%
5640 · Life & LTD Insurance	616	603	600	630	30	5%
5650 · Retirement Plan Contributions	8,534	9,008	9,176	9,635	459	5%
5655 · Retirement Plan Fees & Costs	702	710	507	517	10	2%
5660 · Training/Development	649	670	45	46	1	2%
Total Salaries/Benefit Expenses	115,712	121,603	120,132	126,122	5,990	5%
General & Administrative						
7025 · Office Supplies	121	228	165	165	-	0%
7035 · Postage/Mailing, net	296	358	245	245	-	0%
7040 · Copy/Printing Expense	31	31	17	17	-	0%
7055 · Computer Supplies & Small Equip	-	-	27	28	1	3%
7100 · Telephone	3,239	3,049	3,165	3,165	-	0%
7120 · Membership/Dues	570	555	595	595	-	0%
7175 · O/S Consultants	-	-	114	114	-	0%
Total General & Administrative Expenses	4,266	4,220	4,327	4,328	1	0%
Building Overhead						
6015 · Janitorial Expense	437	344	205	211	6	3%
6020 · Heat	255	231	147	152	4	3%
6025 · Electricity	699	503	313	322	9	3%
6030 · Water/Sewer	75	65	50	52	2	3%
6035 · Outside Maintenance	200	105	94	96	3	3%
6040 · Building Repairs	471	101	139	143	4	3%
6045 · Bldg Mtncn Contracts	552	441	236	243	7	3%
6050 · Bldg Mtncn Supplies	35	47	30	31	1	3%
6065 · Bldg Insurance/Fees	233	187	117	121	4	3%
6070 · Building & Improvements Depre	762	585	360	371	11	3%
6075 · Furniture & Fixtures Depre	223	176	97	100	3	3%
7065 · Computers, Equip & Sftwre Depre	2,414	1,974	1,192	1,228	36	3%
Total Building Overhead Expenses	6,355	4,759	2,980	3,070	89	3%
Total Expenses	126,333	130,618	127,457	133,537	6,080	5%
Net Profit (Loss)	\$ (126,333)	\$ (130,618)	\$ (127,457)	\$ (133,537)	\$ (6,080)	5%

Utah State Bar
Preliminary FY2019 Budget
Based on Actual Results through 3/31/19
18 - Access to Justice

	Actual FY 2017	Actual FY 2018	Projected FY 2019	Draft Budget FY 2020	\$ Change 2019 Projected vs 2020 Budget	% Change 2019 Projected vs 2020 Budget
Revenue						
4063 · Modest Means revenue	11,800	11,200	10,700	10,914	214	2%
4200 · Seminar Profit/Loss	-	(487)	(487)	(497)	(10)	2%
Total Revenue	11,800	10,713	10,213	10,417	204	2%
Expenses						
Program Services						
5002 · Meeting facility-internal only	2,060	2,470	3,093	3,093	-	0%
5035 · Awards	72	-	48	48	-	0%
5037 · Grants/ contributions - general	1,000	4,000	1,000	1,000	-	0%
5075 · Food & Bev-external costs only	1,544	2,338	2,370	2,300	(70)	-3%
5076 · Food & beverage - internal only	4,710	5,825	7,098	7,000	(98)	-1%
5085 · Misc. Program Expense	50	-	113	100	(13)	-11%
5702 · Travel - Lodging	-	1,460	1,545	1,545	-	0%
5703 · Travel - Transportation/Parking	93	822	822	822	-	0%
5704 · Travel - Mileage Reimbursement	2,376	1,366	1,758	1,758	-	0%
5705 · Travel - Per Diems	-	162	162	162	-	0%
5706 · Travel - Meals	-	153	153	153	-	0%
Total Program Services Expenses	11,905	18,598	18,162	17,981	(181)	-1%
Salaries & Benefits						
5510 · Salaries/Wages	78,492	86,966	109,483	126,457	16,974	16%
5605 · Payroll Taxes	6,537	6,997	8,394	10,114	1,720	20%
5610 · Health Insurance	9,881	7,388	7,485	12,259	4,774	64%
5620 · Health Ins/Medical Reimb	-	1,074	2,341	2,458	117	5%
5630 · Dental Insurance	812	787	820	1,301	481	59%
5640 · Life & LTD Insurance	700	678	729	765	36	5%
5650 · Retirement Plan Contributions	5,949	3,609	4,938	5,185	247	5%
5655 · Retirement Plan Fees & Costs	857	353	507	517	10	2%
5660 · Training/Development	600	2,450	2,040	2,081	41	2%
Total Salaries/Benefit Expenses	103,827	110,302	136,738	161,138	24,400	18%
General & Administrative						
7025 · Office Supplies	192	1,058	134	134	-	0%
7035 · Postage/Mailing, net	24	178	155	155	-	0%
7040 · Copy/Printing Expense	549	3,292	1,110	1,110	-	0%
7050 · Computer Maintenance	8,483	8,483	8,483	8,737	254	3%
7089 · Membership Database Fees	3,218	683	59	59	-	0%
7100 · Telephone	4,090	2,929	2,329	2,329	-	0%
7105 · Advertising	-	75	75	75	-	0%
7110 · Publications/Subscriptions	-	-	37	37	-	0%
7120 · Membership/Dues	255	405	375	375	-	0%
7140 · Credit Card Merchant Fees	541	449	461	461	-	0%
7150 · E&O/Off & Dir Insurance	13,861	14,253	14,309	14,738	429	3%
7175 · O/S Consultants	938	-	227	227	-	0%
Total General & Administrative Expenses	34,233	32,445	27,752	28,436	684	2%
Building Overhead						
6015 · Janitorial Expense	844	773	662	681	20	3%
6020 · Heat	493	541	477	491	14	3%
6025 · Electricity	1,349	1,132	1,011	1,041	30	3%
6030 · Water/Sewer	145	142	162	167	5	3%
6035 · Outside Maintenance	386	291	303	312	9	3%
6040 · Building Repairs	910	247	449	463	13	3%
6045 · Bldg Mtncn Contracts	1,066	994	763	786	23	3%
6050 · Bldg Mtncn Supplies	67	125	98	101	3	3%
6065 · Bldg Insurance/Fees	450	422	378	390	11	3%
6070 · Building & Improvements Depre	1,472	1,323	1,163	1,198	35	3%
6075 · Furniture & Fixtures Depre	430	399	315	324	9	3%
7065 · Computers, Equip & Sftwre Depre	4,661	4,493	3,855	3,971	116	3%
Total Building Overhead Expenses	12,272	10,883	9,636	9,925	289	3%
Total Expenses	162,237	172,228	192,288	217,480	25,192	13%
Net Profit (Loss)	\$ (150,437)	\$ (161,515)	\$ (182,075)	\$ (207,063)	\$ (24,988)	14%

Utah State Bar
Preliminary FY2019 Budget
Based on Actual Results through 3/31/19
19 - Tuesday Night Bar

	Actual FY 2017	Actual FY 2018	Projected FY 2019	Draft Budget FY 2020	\$ Change 2019 Projected vs 2020 Budget	% Change 2019 Projected vs 2020 Budget
Expenses						
Program Services						
5002 · Meeting facility-internal only	26,565	26,999	25,447	25,447	-	0%
5075 · Food & Bev-external costs only	515	452	396	400	4	1%
5076 · Food & beverage - internal only	360	1,156	1,136	1,148	11	1%
5085 · Misc. Program Expense	3,498	4,518	4,542	4,633	91	2%
Total Program Services Expenses	30,938	33,125	31,521	31,627	106	0%
Salaries & Benefits						
5510 · Salaries/Wages	3,163	2,508	2,168	2,276	108	5%
5605 · Payroll Taxes	262	206	177	185	9	5%
5620 · Health Ins/Medical Reimb	-	32	71	74	4	5%
5650 · Retirement Plan Contributions	191	110	210	221	11	5%
Total Salaries/Benefit Expenses	3,716	2,856	2,626	2,757	131	5%
General & Administrative						
7025 · Office Supplies	13	-	1	1	0	
7110 · Publications/Subscriptions	218	714	734	749	15	2%
Total General & Administrative Expenses	231	714	735	750	15	2%
Total Expenses	34,885	36,695	34,881	35,133	252	1%
Net Profit (Loss)	\$ (34,885)	\$ (36,695)	\$ (34,881)	\$ (35,133)	\$ (252)	1%

Utah State Bar
Preliminary FY2019 Budget
Based on Actual Results through 3/31/19
20 - Legislative

	Actual FY 2017	Actual FY 2018	Projected FY 2019	Draft Budget FY 2020	\$ Change 2019 Projected vs 2020 Budget	% Change 2019 Projected vs 2020 Budget
Expenses						
Program Services						
5002 · Meeting facility-internal only	1,645	1,880	1,360	1,360	-	0%
5055 · Legislative Expense	46,151	44,126	44,768	60,000	15,232	34%
5075 · Food & Bev-external costs only	608	-	557	557	-	0%
5076 · Food & beverage - internal only	3,947	5,162	3,329	3,329	-	0%
5703 · Travel - Transportation/Parking	-	-	130	130	-	0%
5820 · ABA Annual Delegate	-	-	1,938	1,938	-	0%
Total Program Services Expenses	52,765	51,168	52,082	67,314	15,232	29%
Salaries & Benefits						
5510 · Salaries/Wages	2,094	1,810	6,665	6,998	333	5%
5605 · Payroll Taxes	161	133	532	559	27	5%
5620 · Health Ins/Medical Reimb	-	2	2	2	0	5%
5650 · Retirement Plan Contributions	194	163	659	692	33	5%
Total Salaries/Benefit Expenses	2,449	2,108	7,858	8,251	393	5%
Total General & Administrative Expenses	42	7	192	195	4	2%
Total Expenses	55,256	53,283	60,132	75,760	15,628	26%
Net Profit (Loss)	\$ (55,256)	\$ (53,283)	\$ (60,132)	\$ (75,760)	\$ (15,628)	26%

Utah State Bar
Preliminary FY2019 Budget
Based on Actual Results through 3/31/19
21 - Commission/Sp Projects

	Actual FY 2017	Actual FY 2018	Projected FY 2019	Draft Budget FY 2020	\$ Change 2019 Projected vs 2020 Budget	% Change 2019 Projected vs 2020 Budget
Revenue						
4095 · Miscellaneous Income	15	-	-	\$ -	-	
4200 · Seminar Profit/Loss	-	(677)	(609)	\$ -	609	-100%
Total Revenue	15	(677)	(609)	-	609	
Expenses						
Program Services						
5001 · Meeting Facility-external only	485	512	1,002	1,000	(2)	0%
5002 · Meeting facility-internal only	7,245	4,975	3,530	2,500	(1,030)	-29%
5030 · Speaker Fees & Expenses	-	-	250	250	-	0%
5035 · Awards	1,251	1,144	1,921	2,500	579	30%
5037 · Grants/ contributions - general	2,900	1,600	2,170	2,000	(170)	-8%
5063 · Special Event Expense	407	697	367	1,750	1,383	377%
5070 · Equipment Rental	948	296	1,139	750	(389)	-34%
5075 · Food & Bev-external costs only	16,526	22,819	7,757	10,000	2,243	29%
5076 · Food & beverage - internal only	9,224	9,314	7,804	8,000	196	3%
5702 · Travel - Lodging	7,597	6,377	752	700	(52)	-7%
5703 · Travel - Transportation/Parking	4,351	1,393	628	600	(28)	-4%
5704 · Travel - Mileage Reimbursement	324	185	1,616	2,000	383	24%
5705 · Travel - Per Diems	1,319	2,297	1,180	1,000	(180)	-15%
5707 · Travel - Commission Mtgs	43,919	39,223	54,695	39,000	(15,695)	-29%
5805 · ABA Annual Meeting	1,609	1,567	3,901	3,900	(1)	0%
5810 · ABA Mid Year Meeting	8,306	8,760	6,468	7,100	632	10%
5815 · Commission/Education	23,395	23,165	17,900	22,000	4,100	23%
5820 · ABA Annual Delegate	9,617	15,784	10,552	10,000	(552)	-5%
5830 · Western States Bar Conference	14,058	6,076	13,000	10,000	(3,000)	-23%
5840 · President's Expense	19,015	19,687	20,188	20,000	(188)	-1%
5841 · President's Reimbursement	349	5,554	1,922	1,250	(672)	-35%
5845 · Reg Reform Task Force	-	-	5,912	10,000	4,088	69%
5850 · Leadership Academy	11,871	12,400	20,000	20,000	-	0%
5855 · Bar Review	830	2,219	1,979	1,500	(479)	-24%
5860 · Commission Mtg Travel	-	-	-	-	-	0%
5865 · Retreat	21,080	34,356	31,293	25,000	(6,293)	-20%
5866 · Wellbeing Committee	-	-	-	50,000	50,000	0%
Total Program Services Expenses	232,234	220,758	217,926	252,800	34,874	16%
Salaries & Benefits						
5510 · Salaries/Wages	6,949	1,500	1,015	1,747	733	72%
5605 · Payroll Taxes	465	114	82	119	37	45%
5620 · Health Ins/Medical Reimb	-	5	12	46	34	270%
5650 · Retirement Plan Contributions	660	103	51	87	36	69%
Total Salaries/Benefit Expenses	8,074	1,723	1,161	2,000	839	72%
General & Administrative						
7025 · Office Supplies	-	377	236	300	64	27%
7035 · Postage/Mailing, net	899	138	321	300	(21)	-7%
7040 · Copy/Printing Expense	4,907	4,092	5,000	3,000	(2,000)	-40%
7045 · Internet Service	1,044	1,458	2,322	2,000	(322)	-14%
7089 · Membership Database Fees	1,443	-	-	-	-	#DIV/0!
7100 · Telephone	319	253	207	250	43	21%
7145 · Commission Election Expense	3,250	3,256	1,912	3,250	1,338	70%
7150 · E&O/Off & Dir Insurance	4,797	5,112	5,247	5,000	(247)	-5%
7195 · Other Gen & Adm Expense	804	1,134	638	1,450	812	127%
Total General & Administrative Expenses	23,462	15,819	15,882	15,550	(332)	-2%
Total Expenses	263,771	238,300	234,969	270,350	35,381	15%
Net Profit (Loss)	\$ (263,756)	\$ (238,977)	\$ (235,578)	\$ (270,350)	\$ (34,772)	15%

Utah State Bar
Preliminary FY2019 Budget
Based on Actual Results through 3/31/19
22 - Public Education

	Actual FY 2017	Actual FY 2018	Projected FY 2019	Draft Budget FY 2020	\$ Change 2019 Projected vs 2020 Budget	% Change 2019 Projected vs 2020 Budget
Expenses						
Program Services						
5002 · Meeting facility-internal only	-	-	-	-	-	
5075 · Food & Bev-external costs only	134	285	24	24	-	0%
5702 · Travel - Lodging	1,276	-	581	581	-	0%
5703 · Travel - Transportation/Parking	624	-	416	416	-	0%
5704 · Travel - Mileage Reimbursement	439	-	816	816	-	0%
5705 · Travel - Per Diems	236	-	165	165	-	0%
Total Program Services Expenses	4,688	285	2,003	2,003	-	0%
Salaries & Benefits						
5510 · Salaries/Wages	72,450	49,457	62,911	66,057	3,146	5%
5605 · Payroll Taxes	5,666	3,930	4,758	4,996	238	5%
5610 · Health Insurance	8,351	4,204	6,600	6,930	330	5%
5620 · Health Ins/Medical Reimb	-	600	1,189	1,248	59	5%
5630 · Dental Insurance	443	279	428	450	21	5%
5640 · Life & LTD Insurance	503	307	450	473	23	5%
5650 · Retirement Plan Contributions	7,347	-	3,020	3,171	151	5%
5655 · Retirement Plan Fees & Costs	702	-	164	168	3	2%
5660 · Training/Development	895	250	440	449	9	2%
Total Salaries/Benefit Expenses	96,357	59,028	79,961	83,941	3,980	5%
General & Administrative						
7025 · Office Supplies	59	211	211	211	-	0%
7035 · Postage/Mailing, net	6	10	1	1	-	0%
7040 · Copy/Printing Expense	845	2,310	3,075	3,075	-	0%
7045 · Internet Service	891	1,188	1,188	1,188	-	0%
7055 · Computer Supplies & Small Equip	266	105	105	108	3	3%
7100 · Telephone	1,320	1,115	1,138	1,138	-	0%
7105 · Advertising	12,603	45,605	39,000	39,000	-	0%
7110 · Publications/Subscriptions	516	721	1,005	1,005	-	0%
7115 · Public Relations	1,948	50,280	50,000	50,000	-	0%
7120 · Membership/Dues	420	135	135	135	-	0%
7175 · O/S Consultants	-	500	114	114	-	0%
7195 · Other Gen & Adm Expense	-	-	592	592	-	0%
Total General & Administrative Expenses	18,874	102,179	96,562	96,566	3	0%
Building Overhead						
6015 · Janitorial Expense	317	333	354	365	11	3%
6020 · Heat	185	241	255	263	8	3%
6025 · Electricity	506	488	541	557	16	3%
6030 · Water/Sewer	54	59	87	89	3	3%
6035 · Outside Maintenance	145	144	162	167	5	3%
6040 · Building Repairs	341	113	240	248	7	3%
6045 · Bldg Mtncn Contracts	400	430	408	420	12	3%
6050 · Bldg Mtncn Supplies	25	61	53	54	2	3%
6065 · Bldg Insurance/Fees	169	183	202	208	6	3%
6070 · Building & Improvements Depr	552	573	622	641	19	3%
6075 · Furniture & Fixtures Depr	161	173	168	173	5	3%
7065 · Computers, Equip & Sftwre Depr	1,748	1,955	2,062	2,124	62	3%
Total Building Overhead Expenses	4,602	4,754	5,154	5,309	155	3%
Total Expenses	124,522	166,246	183,681	187,819	4,138	2%
Net Profit (Loss)	\$ (124,522)	\$ (166,246)	\$ (183,681)	\$ (187,819)	\$ (4,138)	2%

Utah State Bar
Preliminary FY2019 Budget
Based on Actual Results through 3/31/19
23 - Young Lawyers Division

	Actual FY 2017	Actual FY 2018	Projected FY 2019	Draft Budget FY 2020	\$ Change 2019 Projected vs 2020 Budget	% Change 2019 Projected vs 2020 Budget
Revenue						
4052 · Meeting - Sponsor Revenue	\$ 1,000	\$ 2,250	\$ 1,790	\$ 1,790	\$ -	0%
4081 · CLE - Registrations	-	218	218	218	-	0%
4200 · Seminar Profit/Loss	3,346	3,897	3,897	3,897	-	0%
Total Revenue	4,346	6,365	5,905	5,905	-	0%
Expenses						
Program Services						
5001 · Meeting Facility-external only	-	1,000	3,200	3,200	-	0%
5002 · Meeting facility-internal only	405	240	80	80	-	0%
5035 · Awards	1,300	1,841	539	539	-	0%
5037 · Grants/ contributions - general	5,550	3,100	3,400	3,400	-	0%
5062 · Law Day	-	900	900	900	-	0%
5063 · Special Event Expense	4,655	2,979	7,000	7,000	-	0%
5075 · Food & Bev-external costs only	9,613	18,512	15,000	15,000	-	0%
5076 · Food & beverage - internal only	20	20	330	330	-	0%
5085 · Misc. Program Expense	1,909	1,069	766	766	-	0%
5095 · Wills for Heroes	668	1,676	856	856	-	0%
5702 · Travel - Lodging	1,195	7,046	5,000	5,000	-	0%
5703 · Travel - Transportation/Parking	3,394	1,922	5,000	5,000	-	0%
5704 · Travel - Mileage Reimbursement	-	2,062	492	492	-	0%
5706 · Travel - Meals	125	675	563	563	-	0%
5805 · ABA Annual Meeting	5,244	3,776	5,000	5,000	-	0%
5810 · ABA Mid Year Meeting	3,456	4,263	6,000	6,000	-	0%
5815 · Commission/Education	2,840	1,168	1,500	1,500	-	0%
5865 · Retreat	307	3,072	5,000	5,000	-	0%
Total Program Services Expenses	41,156	56,196	60,627	60,627	-	0%
Salaries & Benefits						
5510 · Salaries/Wages	76	543	50	53	3	5%
5605 · Payroll Taxes	12	47	4	5	0	5%
5660 · Training/Development	-	190	190	194	4	2%
Total Salaries/Benefit Expenses	89	834	245	251	7	3%
General & Administrative						
7025 · Office Supplies	249	31	387	387	-	0%
7035 · Postage/Mailing, net	11	-	0	0	-	0%
7040 · Copy/Printing Expense	671	1,967	1,122	1,122	-	0%
7045 · Internet Service	-	-	-	-	-	0%
7055 · Computer Supplies & Small Equip	-	612	612	612	-	0%
7105 · Advertising	588	400	400	400	-	0%
7110 · Publications/Subscriptions	-	198	370	370	-	0%
7120 · Membership/Dues	-	146	146	146	-	0%
7140 · Credit Card Merchant Fees	-	-	-	-	-	0%
7195 · Other Gen & Adm Expense	-	220	317	317	-	0%
Total General & Administrative Expenses	2,119	3,574	3,355	3,355	-	0%
Building Overhead						
Total Expenses	43,364	60,603	64,227	64,233	7	0%
Net Profit (Loss)	\$ (39,017)	\$ (54,238)	\$ (58,321)	\$ (58,328)	\$ (7)	0%

Utah State Bar
Preliminary FY2019 Budget
Based on Actual Results through 3/31/19
24 - Licensed Paralegal Practit

	Actual FY 2017	Actual FY 2018	Projected FY 2019	Draft Budget FY 2020	\$ Change 2019 Projected vs 2020 Budget	% Change 2019 Projected vs 2020 Budget
Expenses						
Program Services						
5014 · Questions	-	36,700	36,500	36,500	-	0%
5703 · Travel - Transportation/Parking	-	528	528	528	-	0%
Total Program Services Expenses	418	37,228	37,028	37,028	-	0%
Salaries & Benefits						
5510 · Salaries/Wages	297	8,827	10,000	10,500	500	5%
5605 · Payroll Taxes	25	740	1,000	1,050	50	5%
5650 · Retirement Plan Contributions	30	35	1,017	1,068	51	5%
Total Salaries/Benefit Expenses	352	9,601	12,017	12,618	601	5%
General & Administrative						
7105 · Advertising	-	-	-	10,995	10,995	#DIV/0!
Total General & Administrative Expenses	-	4	-	10,995	10,995	#DIV/0!
Building Overhead						
Total Expenses	770	46,833	49,046	60,642	11,596	24%
Net Profit (Loss)	\$ (770)	\$ (46,833)	\$ (49,046)	\$ (60,642)	\$ (11,596)	24%

TAB
10

UTAH TASK FORCE ON LAWYER AND JUDGE WELL-BEING
February 2019

REPORT AND RECOMMENDATIONS

A. For Regulators

“Regulators” are broadly defined by the ABA as including the highest court in each state and all stakeholders who assist that court in regulating the practice of law. This “includes lawyers and staff in regulatory offices; volunteer lawyer and non-lawyer committee, board, and commission members; and professional liability lawyers who advise law firms and represent lawyers in the regulatory process.” In Utah, “regulators” include the Utah Supreme Court, the Utah State Bar, the Office of Professional Conduct, the Committee on Ethics and Discipline of the Supreme Court, the Supreme Court’s Advisory Committee on Continuing Legal Education, the Utah State Bar’s Admissions Committee, and the Utah State Bar’s Character and Fitness Committee.

Regulators are well positioned to identify conditions that can be detrimental to well-being, and they can be instrumental in improving regulatory processes to address conditions that produce toxic professional environments.

1. Revise rules as needed to prioritize lawyer well-being.

We recommend evaluating relevant rules to prioritize rehabilitation over punishment where appropriate. This would include evaluating the rules governing Lawyer Discipline and Disability and any other relevant rules, and considering alternatives to discipline such as diversion programs. The ABA has recognized that to accomplish other professional objectives, the profession must first have healthy, competent lawyers. Healthiness, competency, and contentedness stem from effective rehabilitation. Amendments that prioritize rehabilitation over punishment will promote lawyer well-being, provide a healthier, more competent bar, and will ultimately protect clients.

2. Evaluate amending the rules of professional responsibility to endorse well-being as part of a lawyer’s duty of competence.

Lawyers owe a duty of competence to their clients. “Competent” representation is defined as requiring “the legal knowledge, skill, thoroughness and preparation reasonably necessary for the representation.” We should study amending applicable rules to include well-being as part of a lawyer’s duty of competence. In the event of such an amendment, the intention would not be for lawyers to be punished for failing to satisfy the well-being requirement. Instead, enforcement of this provision would proceed only in the case of actionable misconduct in client representation or in connection with disability proceedings. The intent of this proposed modification is to “remind lawyers that their mental and physical health impacts clients and the administration of justice.”

3. Expand continuing education curriculum to include well-being topics.

Regulators should evaluate expanding continuing education curriculum to include well-being topics. We should consider whether this should take the form of a required well-being hour of credit per reporting period, or simply granting CLE credit for this type of programming. In 2017, the ABA proposed a new rule that would require “lawyers to earn at least one credit hour every three years of CLE programming that addresses the prevention, detection, and/or treatment of ‘mental health and substance use disorders.’” Topic ideas can be found in Appendix B to the National Task Force Report. We note that this effort is already underway: for example, at the 2018 Utah State Bar Fall Forum, the MCLE Board granted CLE credit for well-being-related programming, including a plenary session addressing well-being topics and a day-long track of well-being-related sessions.

4. Re-evaluate bar application inquiries about mental health history.

There is controversy regarding whether bar admission agencies should eliminate inquiries about applicants’ mental health as part of fitness evaluations for licensure. Some argue that those inquiries discourage people in need of help from seeking it. Others contend that this information is necessary to evaluate the risk applicants might pose to the public. In 2015, the ABA adopted a resolution that such inquiries should be more narrowly focused “on conduct or behavior that impairs an applicant’s ability to practice law in a competent, ethical, and professional manner.” We recommend evaluating current admission inquiries to ensure they closely focus on such conduct or behavior rather than more general diagnosis or treatment history, as appropriate.

B. For the Utah State Bar

In addition to the recommendations for regulators that may involve the Bar, the following recommendations are specific to the Utah State Bar.

1. Sponsor a study to determine Utah lawyers’ well-being baseline.

Commission a scientific study of Utah lawyers to measure well-being, including stress, depression, anxiety, substance abuse, and attitudes toward seeking mental health and substance abuse treatment. The study will be confidential and scientifically valid. Because there will be a financial cost to this, we recommend coordinating with similar studies of judges and law students, if possible, to share costs.

2. Create a framework for future studies at regular intervals.

These studies will measure changes from the baseline and evaluate where well-being has improved or worsened, which efforts are working, which efforts are not working, and what specific challenges Utah lawyers continue to face. This information will ensure that we continue

to improve our efforts to increase lawyer well-being in an evidence-based manner. These studies will be confidential and scientifically valid. Because there will be a financial cost for this, we recommend coordinating with similar studies of judges and law students, if possible, to share costs.

3. Sponsor high-quality CLE programming on well-being-related topics.

Develop and gather existing educational programming on well-being-related topics. Bar leadership should adopt a goal of providing at least one well-being-related educational opportunity at the Spring and Summer Conventions and the Fall Forum, and at other Bar-sponsored events where appropriate and possible. As noted above, these efforts have already begun: the 2018 Fall Forum included a plenary session addressing well-being and a day-long track of sessions filled with well-being-related topics. These sessions were full and well-received. The Bar has planned additional well-being-related programming for its 2019 events and conventions.

4. Consider creating “best practice” model policies.

The National Task Force recommends that state bar associations develop “best practice” model policies for legal employers in areas that affect well-being, such as: responding to lawyers in distress, responding to lawyers with substance abuse problems, diversity and inclusion, mentoring, work-life balance, etc. We should assess whether any such policies are already being developed (for example, by the Utah Center for Legal Inclusion), and if not, whether this is something the Bar would want to undertake.

Creating a Well-Being Movement in the Utah Legal Community

Report and Recommendations from

THE UTAH TASK FORCE
ON LAWYER AND JUDGE WELL-BEING

February 2019

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INTRODUCTION: A Call to Action

The National Task Force on Lawyer Well-Being sounded a wake-up call in 2017 with its report titled “The Path to Lawyer Well-Being: Practical Recommendations for Positive Change.” The Report drew upon a 2016 study of nearly 13,000 practicing lawyers commissioned by the American Bar Association and the Hazelden Betty Ford Foundation. The Report’s message is clear: too many lawyers are struggling. The 2016 Study found that a high rate of lawyers experience some level of problem drinking, depression, and anxiety.¹

While most lawyers may not have a mental health or substance abuse disorder, that does not mean they are flourishing. The Report notes that many lawyers struggle with stress, work addiction, and sleep deprivation.² And “[m]any lawyers experience a ‘profound ambivalence’ about their work”³ Job dissatisfaction and attrition are challenges for lawyers and legal employers alike.

These problems start early. While law students generally begin law school with “high life satisfaction and strong mental health measures,”⁴ this changes for the worse within the first year. “Law students are among the most dissatisfied, demoralized, and depressed of any graduate student population.”⁵

These problems are compounded by the tendency of lawyers and law students to avoid seeking help.

The National Task Force’s report focused on five central themes:

(1) identifying stakeholders and the role each of us can play in reducing the level of toxicity in the legal profession;

¹ THE PATH TO LAWYER WELL-BEING: PRACTICAL RECOMMENDATIONS FOR POSITIVE CHANGE 7 (Aug. 2017) [hereinafter *THE PATH TO LAWYER WELL-BEING*] (citing Patrick R. Krill et al., *The Prevalence of Substance Use and Other Mental Health Concerns Among American Attorneys*, 10 J. ADDICTION MED. 46, 46 (2016)).

² *Id.* The Study found that 21–36% of lawyers are problem drinkers, 28% struggle with depression, and 19% experience anxiety. See Patrick R. Krill et al., *The Prevalence of Substance Use and Other Mental Health Concerns Among American Attorneys*, 10 J. ADDICTION MED. 46, 46 (2016).

³ *Id.* (citing Jerome M. Organ, *What Do We Know About the Satisfaction/Dissatisfaction of Lawyers? A Meta-Analysis of Research on Lawyer Satisfaction and Well-Being*, 8 U. ST. THOMAS L. J. 225, 225 (2011); Lawrence S. Krieger & Kennon M. Sheldon, Ph.D., *What Makes Lawyers Happy?: A Data-Driven Prescription to Redefine Professional Success*, 83 GEO. WASH. L. REV. 554, 554 (2015)).

⁴ *Id.* at 35.

⁵ *Id.* (citing Abigail A. Patthoff, *This Is Your Brain on Law School: The Impacts of Fear-Based Narratives on Law Students*, 2015 UTAH L. REV. 391, 424 (2015)).

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- (2) eliminating the stigma associated with help-seeking behaviors;
- (3) emphasizing that well-being is an indispensable part of a lawyer's duty of competence;
- (4) educating lawyers, judges, law schools, and law students on lawyer well-being issues; and
- (5) taking small, incremental steps to change how law is practiced and how lawyers are regulated to instill greater well-being in the profession.

The National Task Force issued a call to action, challenging leaders in the legal profession to "get serious" about the well-being of lawyers.

The Utah Supreme Court and the Utah State Bar have accepted the challenge. Together, we have established the Utah Task Force on Lawyer and Judge Well-Being to create a well-being movement in the Utah legal community.

THE UTAH TASK FORCE ON LAWYER AND JUDGE WELL-BEING

Our Mission: Creating a well-being movement in the Utah legal community

The Utah Task Force on Lawyer and Judge Well-Being is co-chaired by Utah Supreme Court Justice Paige Petersen and Utah State Bar President Dickson Burton. In the summer of 2018, Justice Petersen and Mr. Burton gathered stakeholders from throughout the legal community to form the Task Force. The Task Force includes representatives from the following groups, entities, and fields: judges, the Administrative Office of the Courts, the Utah State Bar, the Office of Professional Conduct, other regulators, lawyers from large and small private firms, solo practitioners, legal employers, Young Lawyers Division, Lawyers Helping Lawyers, Minority Bar Association, the University of Utah S.J. Quinney College of Law, Brigham Young University J. Reuben Clark Law School, the Department of Substance Abuse and Mental Health, the field of Applied Positive Psychology, and the Utah Psychological Association.

The Task Force was charged with the following assignment: 1) carefully review the National Task Force Report, and 2) using it as a springboard, draw upon the expertise of Task Force members to develop recommendations for each stakeholder category in the Utah legal community. We have done so, and our recommendations are included in this report.

The Task Force believes it is crucial to gather data up front in order to set a baseline for lawyer well-being in Utah. This will allow us to measure our efforts going forward to determine what is working, what isn't working, and whether we have unique challenges in Utah that we must address.

This is our call to action. We hope these recommendations will be a valuable resource for judges, lawyers, legal employers, law students, law schools, regulators, and the Bar as we create our own well-being movement in Utah.

TASK FORCE CHAIRS

Honorable Paige Petersen
Dickson Burton

CHIEF STAFF

Kim Free, PhD

STAFF ATTORNEY

Elizabeth Wright

COMMITTEE MEMBERS

Wendy Archibald
Barbara Dickey
Robert Denny
Cathy Dupont
Dr. Valerie Hale

Honorable Kim Hornak
Honorable Elizabeth Hruby-Mills
Brent Kelsey
Martha Knudson
Cassie Medura
Brook Millard
Andrew Morse
Chris Newbold
James Sorenson
Cara Tangaro

CONSULTANTS

Rick Schwermer
John Baldwin

THE PROBLEM⁶

Practicing lawyers experience high rates of mental health and substance abuse disorders, along with general job dissatisfaction, stress, and anxiety.

problem drinking - 21–36%

depression - 28%

anxiety - 19%

elevated stress - 23%

work addiction - 25%

suicide

sleep deprivation

work-life conflict

avoid seeking help

job dissatisfaction and ambivalence

attrition

⁶ THE PATH TO LAWYER WELL-BEING 7 (citing Patrick R. Krill et al., *The Prevalence of Substance Use and Other Mental Health Concerns Among American Attorneys*, 10 J. ADDICTION MED. 46, 46 (2016)); Anne M. Brafford, *Building the Positive Law Firm: The Legal Profession at Its Best*, (Aug. 1, 2014) (Master's Thesis, Univ. Pa., on file with U. Pa. Scholarly Commons Database), https://repository.upenn.edu/mapp_capstone/62/; Jerome M. Organ, *What Do We Know About the Satisfaction/Dissatisfaction of Lawyers? A Meta-Analysis of Research on Lawyer Satisfaction and Well-Being*, 8 U. ST. THOMAS L. J. 225, 225 (2011)).

WHAT IS WELL-BEING?

Well-being is a broad concept. It is more than the absence of substance abuse or mental health disorders. It is “a continuous process toward thriving”⁷ in all dimensions of life. This includes:

Emotional: Recognizing the importance of emotions; developing the ability to identify and manage our own emotions to support mental health, achieve goals, and inform our decision-making; seeking help for mental health when needed.

Occupational: Cultivating personal satisfaction, growth, and enrichment in our work; obtaining financial stability.

Intellectual: Engaging in continuous learning and the pursuit of creative or intellectually challenging activities that foster ongoing development; monitoring cognitive wellness.

Spiritual: Developing a sense of meaning and purpose in one’s life.

Physical: Striving for regular physical activity, proper diet and nutrition, sufficient sleep, and recovery; minimizing the use of addictive substances; seeking help for physical health when needed.

Social: Developing a sense of connection, belonging, and a well-developed support network while also contributing to our groups and communities.

⁷ THE PATH TO LAWYER WELL-BEING 9.

THE CASE FOR WELL-BEING

Beyond being the right thing to do, there are other important reasons to focus on well-being.

First, well-being is preventative. By proactively identifying and implementing well-being strategies, we can help reduce the chances of Utah lawyers and judges becoming unwell in the first instance.⁸

Second, well-being is strongly connected to ethics and professionalism. Rule 1.1 of the Utah Rules of Professional Conduct requires lawyers to provide competent representation,⁹ which is negatively impacted when a lawyer's well-being declines. For example, alcohol abuse and major depression impair core functions necessary for competent lawyering – causing diminished memory, reduced problem-solving skills, and impaired executive function.¹⁰

Finally, well-being is good for business. People who are thriving perform better, are more likely to enjoy their careers, are less likely to leave their jobs, and have more satisfied clients.¹¹

⁸ See THE PATH TO LAWYER WELL-BEING 33 (speaking to the creation and utility of preventative well-being programs).

⁹ UTAH SUPREME COURT RULES OF PROF'L CONDUCT 1.1 (2019).

¹⁰ THE PATH TO LAWYER WELL-BEING 8–9.

¹¹ *Id.* at 8.

HOW DO WE BEGIN?

How do we start a well-being movement in the Utah legal community? To answer that question, Task Force members developed recommendations specific to the following sectors of the legal community:

Judges

Lawyers and Legal Employers

Regulators

Utah State Bar

Law Schools

RECOMMENDATIONS FOR JUDGES

1. Determine judges' well-being baseline. Commission a scientific study of judges to measure well-being, including stress, depression, anxiety, substance abuse, and attitudes toward seeking mental health and substance abuse treatment. If possible, this study should also measure data specific to judges, such as secondary trauma and compassion fatigue. The study will be confidential and scientifically valid. Because there will be a financial cost for this, we recommend coordinating with similar studies of lawyers and law students, if possible, to share costs.
2. Create a framework for future studies at regular intervals. These studies will measure changes from the baseline and evaluate where well-being has improved or worsened, which efforts are working, which efforts are not working, and what specific challenges judges continue to face. This information will ensure that we continue to improve our efforts to increase judicial well-being in an evidence-based manner. These studies will be confidential and scientifically valid. Because there will be a financial cost for this, we recommend coordinating with similar studies of lawyers and law students, if possible, to share costs.
3. Communicate that well-being is a priority. We encourage judges and other leaders in the judicial branch to communicate the importance of well-being whenever possible and in multiple media. This can be done not only during presentations and speeches or in written articles, but more informally in judges' interactions with lawyers and other judges in and outside of court. We note that these efforts are already underway. At the 2018 Utah State Bar Summer Convention in Sun Valley, Idaho, Chief Justice Matthew Durrant focused on the importance of lawyer well-being in his address to the convention. And as co-chair of this Task Force, Justice Petersen has spoken about well-being to incoming law students at the University of Utah College of Law during orientation week, to judges at the 2018 annual judicial conference, to lawyers at the 2018 Utah State Bar Fall Forum, to firm leaders/managing partners at a Bar-sponsored breakfast for leaders of large law firms, and to women lawyers at the 2019 Banter With the Bench event.

4. Develop high quality training on well-being for new judge orientation, the annual judicial conference, and annual bench-level conferences. Well-being education should be integrated into new judge training in order to prepare new judges for the challenges and stressors they will face, and provide them with tools to handle those challenges as effectively as possible. High quality well-being education should also be included at the judicial conference and bench-level conferences. Topic ideas can be found in Appendix B to the National Task Force Report.
5. Update policies regarding impaired judges and educate judges about those policies. The courts currently have policies and procedures for impaired judges. These policies should be reviewed and modified as necessary to reflect the current understanding of behavioral and mental health issues. These policies and procedures should be communicated to judges and presiding judges through educational materials, trainings, and bench meetings.
6. Reduce the stigma attached to substance abuse and mental health disorders, and encourage help-seeking behavior. Train presiding judges to identify mental health and substance use disorders amongst judges, and eliminate the stigma associated with mental health and substance use disorders. Encourage presiding judges to convey an attitude of support. Include this role in presiding judge education.

RECOMMENDATIONS FOR LAWYERS AND LEGAL EMPLOYERS

1. Educate law firms on how to form a well-being committee. We will conduct in-person meetings with a number of local law firms, yet to be determined. We will communicate why it is in a firm's interest to prioritize lawyer well-being, including that lawyers who are well balanced mentally, physically, and emotionally are more successful in their performance and better stewards of the practice of law. We will guide any interested law firm in establishing its own internal well-being committee.
2. Assist firms in establishing policies and practices to support lawyer well-being. We suggest using the Lawyer Well-Being Tool Kit as a guide when speaking to firms/partners/boards. (See Appendix B of the National Task Force Report.)

RECOMMENDATIONS FOR REGULATORS

“Regulators” are broadly defined by the ABA as including the highest court in each state and all stakeholders who assist that court in regulating the practice of law.¹² This “includes lawyers and staff in regulatory offices; volunteer lawyer and non-lawyer committee, board, and commission members; and professional liability lawyers who advise law firms and represent lawyers in the regulatory process.”¹³ In Utah, “regulators” include the Utah Supreme Court, the Utah State Bar, the Office of Professional Conduct, the Committee on Ethics and Discipline of the Supreme Court, the Supreme Court’s Advisory Committee on Continuing Legal Education, the Utah State Bar’s Admissions Committee, and the Utah State Bar’s Character and Fitness Committee.

Regulators are well positioned to identify conditions that can be detrimental to well-being, and they can be instrumental in improving regulatory processes to address conditions that produce toxic professional environments.

1. Revise rules as needed to prioritize lawyer well-being. We recommend evaluating relevant rules to prioritize rehabilitation over punishment where appropriate. This would include evaluating the rules governing Lawyer Discipline and Disability and any other relevant rules, and considering alternatives to discipline such as diversion programs. The ABA has recognized that to accomplish other professional objectives, the profession must first have healthy, competent lawyers.¹⁴ Healthiness, competency, and contentedness stem from effective rehabilitation. Amendments that prioritize rehabilitation over punishment will promote lawyer well-being, provide a healthier, more competent bar, and will ultimately protect clients.
2. Evaluate amending the rules of professional responsibility to endorse well-being as part of a lawyer’s duty of competence. Lawyers owe a duty of competence to their clients.¹⁵ “Competent” representation is defined as requiring “the legal knowledge, skill,

¹² Resolution 105, AMERICAN BAR ASSOCIATION (Feb. 5, 2018), https://www.americanbar.org/news/reporter_resources/midyear-meeting-2018/house-of-delegates-resolutions/105/.

¹³ THE PATH TO LAWYER WELL-BEING 25.

¹⁴ *Id.*

¹⁵ MODEL RULES OF PROF’L CONDUCT r. 1.1 (AM. BAR ASS’N 2018), https://www.americanbar.org/groups/professional_responsibility/publications/model_rules_of_professional_conduct/model_rules_of_professional_conduct_table_of_contents/.

thoroughness and preparation reasonably necessary for the representation.”¹⁶ We should study amending applicable rules to include well-being as part of a lawyer’s duty of competence. In the event of such an amendment, the intention would not be for lawyers to be punished for failing to satisfy the well-being requirement. Instead, enforcement of this provision would proceed only in the case of actionable misconduct in client representation or in connection with disability proceedings.¹⁷ The intent of this proposed modification is to “remind lawyers that their mental and physical health impacts clients and the administration of justice.”¹⁸

3. Expand continuing education curriculum to include well-being topics. Regulators should evaluate expanding continuing education curriculum to include well-being topics. We should consider whether this should take the form of a required well-being hour of credit per reporting period, or simply granting CLE credit for this type of programming. In 2017, the ABA proposed a new rule that would require “lawyers to earn at least one credit hour every three years of CLE programming that addresses the prevention, detection, and/or treatment of ‘mental health and substance use disorders.’”¹⁹ Topic ideas can be found in Appendix B to the National Task Force Report. We note that this effort is already underway: for example, at the 2018 Utah State Bar Fall Forum, the MCLE Board granted CLE credit for well-being-related programming, including a plenary session addressing well-being topics and a day-long track of well-being-related sessions.
4. Re-evaluate bar application inquiries about mental health history. There is controversy regarding whether bar admission agencies should eliminate inquiries about applicants’ mental health as part of fitness evaluations for licensure. Some argue that those inquiries discourage people in need of help from seeking it. Others contend that this information is necessary to evaluate the risk applicants might pose to the public. In 2015, the ABA adopted a resolution that such inquiries should be more narrowly focused “on conduct or behavior that impairs an applicant’s ability to practice law in a competent, ethical, and

¹⁶ *Id.*

¹⁷ THE PATH TO LAWYER WELL-BEING 26.

¹⁸ *Id.*

¹⁹ *Id.* (citing RULES OF THE STATE BAR OF CAL., Title 2, Div. 4, R. 2.72 (2017)).

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professional manner.”²⁰ We recommend evaluating current admission inquiries to ensure they closely focus on such conduct or behavior rather than more general diagnosis or treatment history, as appropriate.

²⁰ AM. BAR ASS’N RESOL. 102 (August 2015).

RECOMMENDATIONS FOR THE UTAH STATE BAR

In addition to the recommendations for regulators that may involve the Bar, the following recommendations are specific to the Utah State Bar.

1. Sponsor a study to determine Utah lawyers' well-being baseline. Commission a scientific study of Utah lawyers to measure well-being, including stress, depression, anxiety, substance abuse, and attitudes toward seeking mental health and substance abuse treatment. The study will be confidential and scientifically valid. Because there will be a financial cost to this, we recommend coordinating with similar studies of judges and law students, if possible, to share costs.
2. Create a framework for future studies at regular intervals. These studies will measure changes from the baseline and evaluate where well-being has improved or worsened, which efforts are working, which efforts are not working, and what specific challenges Utah lawyers continue to face. This information will ensure that we continue to improve our efforts to increase lawyer well-being in an evidence-based manner. These studies will be confidential and scientifically valid. Because there will be a financial cost for this, we recommend coordinating with similar studies of judges and law students, if possible, to share costs.
3. Sponsor high-quality CLE programming on well-being-related topics. Develop and gather existing educational programming on well-being-related topics. Bar leadership should adopt a goal of providing at least one well-being-related educational opportunity at the Spring and Summer Conventions and the Fall Forum, and at other Bar-sponsored events where appropriate and possible. As noted above, these efforts have already begun: the 2018 Fall Forum included a plenary session addressing well-being and a day-long track of sessions filled with well-being-related topics. These sessions were full and well-received. The Bar has planned additional well-being-related programming for its 2019 events and conventions.
4. Consider creating "best practice" model policies. The National Task Force recommends that state bar associations develop "best practice" model policies for legal employers in

areas that affect well-being, such as: responding to lawyers in distress, responding to lawyers with substance abuse problems, diversity and inclusion, mentoring, work-life balance, etc.²¹ We should assess whether any such policies are already being developed (for example, by the Utah Center for Legal Inclusion), and if not, whether this is something the Bar would want to undertake.

²¹ THE PATH TO LAWYER WELL-BEING 41.

RECOMMENDATIONS FOR LAW SCHOOLS

Both law schools are committed to improving the culture of legal education and the law school experience, which currently can be detrimental to students' mental, emotional, and physical health. This is a lofty goal that will require commitment from faculty, students, and employers. Such change will not happen overnight. But by taking incremental steps, we can begin a process of cultural transformation that will lead to a healthier law school environment over time.

1. Sponsor a study to determine first-year law students' well-being baseline. Commission a scientific study of Utah law students to measure well-being, including stress, depression, anxiety, substance abuse, and attitudes toward seeking mental health and substance abuse treatment. We recommend an initial study be administered to incoming students as early as possible. The study will be confidential and scientifically valid. Because there will be a financial cost for this, we recommend coordinating with similar studies of judges and lawyers, if possible, to share costs.
2. Create a framework for future surveys at regular intervals. Future studies should be repeated at set intervals (for example, at the end of 1L, 2L, and 3L years). These studies will measure changes from the baseline and evaluate where well-being has improved or worsened, which efforts are working, which efforts are not working, and what specific challenges law students at the University of Utah and Brigham Young University continue to face. This information will ensure that we continue to improve our efforts to increase law student well-being in an evidence-based manner. These studies will be confidential and scientifically valid. Because there will be a financial cost for this, we recommend coordinating with similar studies of judges and lawyers, if possible, to share costs.
3. Continue current efforts. Both law schools have already implemented some strategies to promote student welfare.
 - a. The strategies they have in common include:
 - (i) disseminating information about University and community resources (Wellness Center; Counseling Center; OEO; Title IX Office; Center for Sexual Assault; etc.);

Creating a Well-Being Movement in the Utah Legal Community

- (ii) working with Career Services to provide more information to students about non-law firm and other non-traditional employment opportunities; and
 - (iii) actively encouraging employers to focus on critical professional skills that are not reflected in grades.
- b. Additional strategies at the University of Utah College of Law include:
- (i) mindfulness/meditation sessions (Mindful Mondays);
 - (ii) a new spring upper-division course titled Mindful Lawyering taught by professor Cliff Rosky (students will complete pre- and post-course empirically validated assessments that will measure stress, well-being, and mindfulness. Professor Rosky is willing to share his findings with the committee);
 - (iii) mandatory stress management sessions for first-year students; and
 - (iv) therapy dogs during exams.
- c. Additional strategies at Brigham Young University Law include:
- (i) leadership training – communicating to students that a law degree is a leadership degree through a variety of leadership courses and newly created leadership fellowships;
 - (ii) professional identity formation – based on Neil Hamilton’s book “Road Map,” first-year curriculum includes weekly classes on the development of twenty professional competencies. Five of those competencies are reflected in students’ grade point averages. Other competencies include trustworthiness, good judgment, problem solving, work ethic, and interpersonal and organizational skills;
 - (iii) training all faculty and employees on this approach;
 - (iv) hiring a counselor charged, in part, with developing a more robust well-being program; and

Creating a Well-Being Movement in the Utah Legal Community

- (v) instituting a Wednesday Forum, which focuses on innovative changes in legal practice that broaden the range of career alternatives for students.
4. Create a new student organization to promote student well-being and/or a student well-being committee. The group would: a) sponsor well-being-related activities that would be student-led and student-driven; b) sponsor a series of presentations on student well-being (stress management, physical health, resiliency training) by either the student well-being group or by the law school; and c) coordinate with the Student Counseling Center to have an on-site counselor for a portion of the week (subject to budgetary approval).
 5. Continue developing peer-to-peer mentoring programs. Both schools have mentoring programs that pair incoming first-year students with either second or third-year students. The law schools will continue to train the mentors to focus on more than academic success. Mentors can provide encouragement and perspective to first-year students, with emphasis on mental and emotional well-being. Further, mentors can help detect when a student is struggling, and assist in getting help.
 6. Educate professors on well-being issues specific to law students. Topics relevant to law students can be found in Appendix E of the National Task Force Report.

NEXT STEPS

These recommendations are intended to start a well-being movement in Utah. But we must do more than begin. We aim to lay a foundation that will support well-being efforts in the long term. We recommend the following two steps to transition into implementing the recommendations we have set forth.

1. Establish a permanent Committee on Lawyer and Judge Well-Being. The Task Force is a temporary group of experts formed to make recommendations on how Utah can start its own well-being movement. We now need to implement those recommendations, gather data about whether they are working, and then adapt and improve based on the evidence we collect. This is a long-term endeavor. To do this, we need a permanent committee.
2. Determine whether we need a paid director for the Committee. The work load for this committee may be too much to rely entirely upon volunteers. Questions to consider include: do we need a paid director; who should employ the director; what are the responsibilities of this position; and is this a full or part-time job?

CONCLUSION

Elevating the well-being of the members of our legal community is a big task. We must be innovative. And we must be willing to gather data and assess our efforts critically, so that we can continuously improve.

As with any endeavor of such magnitude, it begins with a single step. These recommendations represent our first steps toward a well-being movement in Utah. We hope these recommendations will create a path toward greater well-being for all the members of our legal community.

APPENDIX A**Implementation Plan Timeline:****2019**

- Jan–May Release report and prepare action plans for permanent committee
- June Distribute study to gather local baseline data
- July “Kick-off” Action Plan (new FY’20) Summer Bar Conference, Park City, Utah

2020

- June Distribute local study to compare data

2023

- June Distribute local study to compare data/revisit work

TAB
11

practice of law, and the community; and when such membership otherwise directly serves the purposes and objectives of the Bar as determined by the Board.

C. Fall Forum, Annual and Spring Convention Expenses.

1. Visiting Bar Presidents.

Visiting bar presidents and their guest 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 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, Fall and Spring Convention Committee members receive a 50% registration discount for those conventions.

4. Utah State Bar President and President-elect.

A full complimentary registration package, including lodging and all meal functions shall be provided for the President and his or her guest for the Annual, Fall and Spring Conventions. A full complimentary registration package, including lodging and all meal functions shall be provided for the President-elect and his or her guest for the Spring Convention.

4. 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.

5. 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. Fall Forum award recipients will be provided with one night lodging at the convention hotel and mileage reimbursement if they live more than 50 miles outside of Salt Lake City.

6. Judges.

Judges shall be provided with complimentary convention registration to the Annual, Fall Forum and Spring Conventions.

D. Sections and Committees

1. General.

(a) Creation, Organization and Duration.

(1) Sections.

(1.1) New sections will be considered for formation by written applications submitted to the Board. A new section application will identify the purposes of the proposed section, justify its creation and indicate why its objectives cannot be met by existing sections.

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

APRIL 19, 2019

PROVO, UTAH

In Attendance: President H. Dickson Burton and President-elect Herm Olsen.
Commissioners: Grace Acosta, Steven Burt, Heather Farnsworth, Chrystal Mancuso-Smith, Mark Pugsley, Tom Seiler, Heather Thuet, and Katie Woods.

Ex-Officio Members: Nate Alder, Erik Christiansen, Abby Dizon-Maughan, and Rob Rice.

Not in Attendance: Mary Kay Griffin, Mark Morris, and Cara Tangaro. Ex-Officio Members:
Dean Bob Adler, Amy Fowler, John Lund, Margaret Plane, Dean Gordon Smith, Sarah Starkey, Bebe Vanek, and Lorraine Wardle.

Also in Attendance: Executive Director John C. Baldwin, Assistant Executive Director Richard Dibblee, and General Counsel Elizabeth A. Wright.

Minutes: 9:15 a.m. start

1. President's Report: H. Dickson Burton

1.1 Professional Services Tax Follow-up. Dickson Burton updated the Commission on the status of proposed legislation to impose a sales tax on legal services and other professional services. Dickson reported that the Legislature will establish a task force to study the tax legislation. The task force is expected to make an interim report in June and final recommendations in August. No word yet on who will serve on the task force. The Bar sent a letter suggesting appointment of tax lawyers to serve on the task force.

1.2 Bar Commissioner Participation in Park City Convention Marketing. Commissioners were asked to reach out to lawyers and firm managers to encourage attendance at the 2019 Summer Convention in Park City. The Commission discussed the pro and cons of having the convention in Park City and the need to vary the location to appeal to different attendee interests. Some members see tremendous positives in having the convention in Park City. Some members enjoy Sun Valley and the tradition associated with a convention there. The Summer Convention will be held in Park City in both 2019 and 2020 to give members two opportunities to experience the Convention there. Dickson reported that Sun Valley inquired about our interest in having the convention there in 2021 and the need to reserve as soon as possible. After discussion about the current plan to rotate convention venues, **Heather Farnsworth voted to have the 2021 Summer Convention in Sun Valley. Grace Acosta seconded the motions which passed unopposed.**

2. Action Items

- 2.1 Approve LPP Committee Creation and Membership.** Heather Farnsworth moved to appoint Julie Emery, Heather Allen, Jackie Morrison, Jess Hofberger and Melanie Vartabedian to serve on the LPP Admission Committee. John Bradley seconded the motion which passed unopposed.
- 2.2 Approve LPP Marketing Funding.** After a discussing the proposed marketing proposal to market the LPP profession to prospective LPPs and to the public, Tom Seiler moved to approve spending \$20,745 through the end of the calendar year to market the LPP program. Herm Olsen seconded the motion which passed unopposed.
- 2.3 Approve Regulatory Reform Task Force Funding.** Dickson Burton reported on the goals of the Supreme Court Regulatory Reform Task Force.
- 2.4 Approve Supreme Court Recommendations for OPC.** After discussing the steps the Bar has taken and will take to implement the ABA's recommendations to eliminate perceptions of the Bar's involvement in Supreme Court Screening Panel hearings, and to begin by insuring signage in the Law and Justice Center reflects the separation of OPC and the Bar, Herm Olsen moved to table a vote on the changes. Heather Farnsworth seconded the motion which passed unopposed.

3. Discussion Items.

- 3.1 Providing Lawyers' E-Mail Address as Public Information.** After discussing the need for all lawyers to be reachable by email, Katie Woods moved to change Bar policy to make member's email addresses public information. Tom Seiler seconded the motion which passed unopposed.
- 3.2 Increasing Reimbursements for Speakers and Panelists.** Because the two Commissioners who have concerns about the current policy were absent, Herm Olsen moved to table the discussion and vote. John Bradley seconded the motion which passed unopposed.

4. Information Items.

- 4.1 Well-Being Task Force Draft Report Recommendations.** Dickson Burton reported on the Utah Task Force on Lawyer and Judge Well-Being draft report and recommendations. Dickson highlighted actions that will be required of the Bar such as offering more well-being CLE courses.
- 4.2 ABA Day in Washington Report.** Dickson Burton reported on the success of the ABA Day in Washington D.C. Bar leadership met with staff people for both Senators and all

four Representatives to discuss the importance of keeping loan forgiveness for lawyers who work in public service jobs.

4.3 Western States Bar Conference Report. Katie Woods, Dickson Burton and Herm Olsen reported on the Western State Bar Conference that took place in Hawaii in March. Katie highlighted the quality of the speakers and the focus on lawyer well-being.

4.4 Bar Awards Schedule. Commissioners were notified that Summer Convention award recipients would be chosen at the May Commission Meeting. Commissioners were asked to encourage nominations from membership.

The meeting adjourned at 11:50 a.m.

Consent Agenda

1. Approved Minutes from the March 7, 2019 Commission Meeting with the correction reflecting that Erik Christiansen was present by phone.

Handouts:

1. 2019 Park City Summer Convention agenda and marketing materials.

Summary of Position

This Paper sets forth the conclusions of the Public Member Committee, which was tasked by the Utah State Bar Commission with evaluating and making recommendations to the Bar Commission about whether to expand the number of public members that serve on the Bar Commission. Members of the Public Member Committee included Steven Burt, Erik A. Christiansen, Jacqueline Esty Morrison and Chrystal Mancuso-Smith.

The Public Member Committee recognizes that public members of the Bar Commission add significant value to the Bar Commission, which governs the Utah State Bar. While the Public Member Committee at this time sees no immediate need to advocate for the modification of Utah's present inclusion of two public members, the Committee also has not found any persuasive reasons to not consider increasing the number of public members. If the Bar Commission is inclined to recommend an expansion of the number of public members that serve on the Bar Commission, such a course of action, of course, would require a rule change. In that event, the Committee believes it would be important for the Commission to solicit input from membership of the Utah State Bar as to any potential criteria for expansion to include additional public members, *i.e.* total number of members, duration of positions, industry or other backgrounds of candidates, etc. . . .

A process that solicits input from membership of the Utah State Bar would help ensure that public members are chosen from a diverse background to broaden the knowledge and experience of the Bar Commission. The Committee recommends that this subject be a topic for future Bar Commission discussions so that any potential proposals can address the needs of the profession and the public, and so that any potential changes are made in a thoughtful and inclusive manner.

Background

The Public Member Committee reviewed the various compositions of other governing state bar organizations (Alaska, Arizona, Florida, Texas, Oregon, Washington, and Wisconsin) and considered other factors such as the size of the bar itself.

As part of any future modifications to public member participation on the Utah State Bar Commission, it should be noted that, compared to other professions, the Utah Bar potentially might be considered "light" on public representation. The Committee's research revealed that Utah licensing board data for other professions shows a higher percentage of public board membership in other professions as compared to attorneys. For example, physicians include 2 public members on an 11 member board (18.2%); CPA's, Architects, Pharmacists, Plumbers, Electricians, Alarm Techs and Veterinarians include 1 public member on a 5 person board (20%); Engineers and Lawyers include 1 public member on a 7 person board, or 2 in fourteen, respectively, (14.3%); and Dentists include 1 public member on a 9 person board (11.1%).

When comparing Utah to other State Bar organizations, the following information was reviewed and considered.

1. Utah's State Bar membership differs from the other bars examined. While other bars do include more than 2 public members, the composition of their state bars arguably are different than Utah. For example:
 - Texas, which has the largest state bar board at 60 members, is geographically much larger (3 times as big as Utah), has many more judicial districts than does Utah (456 judicial district courts, each with a single judge) and has almost 100,000 active attorneys;
 - Other bar organizations directly are responsible for areas like attorney admission and discipline, which might arguably weigh in favor of more public participation; and
 - The Utah State Bar already has two public members, who provide valuable input and resources.
2. Expense and Logistics to Consider. While not a determinative factor, any recommended modification to the composition of the Commission will have additional administrative effects to consider.
 - Many of the various other state bar boards that have more public members contain a significantly higher number of members (as many as 60 members);
 - Logistically, with an increased number of members, bar meetings would be more difficult to coordinate and to host (this is not a large problem unless we are considering a significant increase in the number of members);
 - There would be some minimal additional expenses associated with increasing the size of the board (travel, reimbursement, materials, meals, meeting space, etc.); and
 - Appointment of members potentially might require political input and result in unforeseen modifications, including the need to consider term limits.
3. No Pressing Need identified to change composition at this time.
 - At this time, there has been no articulated pressing need for increasing the size of the current board identified by any particular bar member or from the public.
 - In the event that this changes in the future, it would be appropriate to revisit the inclusion of additional public members. As part of that discussion, it would be important to seek the input of Bar membership. Of course, any change to Rule 14-103 would have to be properly enacted and be posted for comment, but it would be beneficial to seek input from attorneys and the public before making any recommendation to modify the rule.

4. Public perception – one of the primary benefits to having public members serve on the Bar Commission is the direct input the Commission receives from public members as to how lawyers are perceived and to solicit input on improving the practice of law (billing and taxation, for example, comes to mind as a recent topic of discussion). We are unaware of any public perception issues at this time. However, the addition of additional public representatives on the Commission might signal to members of the public that the Bar does, in fact, value public input and, by adding members, is actively seeking consumer feedback.