

**UTAH STATE BAR COMMISSION MEETING**  
**Thursday, May 26, 2022**

**Utah Law and Justice Center**

**AGENDA**

**1. 9:00 a.m. President's Report: Heather Thuet**

- |                 |     |   |
|-----------------|-----|---|
| <i>05 Mins.</i> | 1.1 | Summer Convention Update                  |
| <i>05 Mins.</i> | 1.2 | Bar Review Talent Show May 26 and June 30 |

**2. 9:15 a.m. Action Items**

- |                 |     |  |                                  |
|-----------------|-----|--|----------------------------------|
| <i>30 Mins.</i> | 2.1 | Approve Proposed 2022-2023 Budget                    | <a href="#">(Tab 1, Page 3)</a>  |
| <i>20 Mins.</i> | 2.2 | Heather Thuet Request for WSBC Reimbursement         | <a href="#">(Tab 2, Page 51)</a> |
| <i>10 Mins.</i> | 2.3 | Select Lawyer of the Year Award Recipient            | <a href="#">(Tab 3, Page 61)</a> |
| <i>10 Mins.</i> | 2.4 | Select Judge of the Year Award Recipient             | <a href="#">(Tab 4, Page 65)</a> |
| <i>10 Mins.</i> | 2.5 | Select Section of the Year Award Recipient           | <a href="#">(Tab 5, Page 71)</a> |
| <i>10 Mins.</i> | 2.6 | Select Committee of the Year Award Recipient         | <a href="#">(Tab 6, Page 74)</a> |
| <i>10 Mins.</i> | 2.7 | Select Special/Distinguished Service Award Recipient | <a href="#">(Tab 7, Page 76)</a> |

**3. 11:00 a.m. Information Item**

- |                 |     |  |
|-----------------|-----|--|
| <i>15 Mins.</i> | 3.1 | Innovation Office Task Force: <b>Erik Christiansen</b> |
|-----------------|-----|--|

**4. 11:15 a.m. Reports**

- |                 |     |  |
|-----------------|-----|--|
| <i>15 Mins.</i> | 4.1 | Leadership Academy: <b>Jen Tomchak</b> |
| <i>10 Mins.</i> | 4.2 | Commission Retreat: <b>Katie Woods</b> |

**5. 12:00 N. Luncheon with 50 Year Award Recipients**

**CONSENT AGENDA**

[\(Tab 8, Page 80\)](#)

1. Approve Minutes of April 22, 2022 Commission Meeting

**ATTACHMENTS**

[\(Tab 9, Page 85\)](#)

1. April 2022 Financial Statement

## **CALENDAR**

**2022**

<b>May 26</b>	Bar ReView: Attorneys Got Talent Auditions	5:30 p.m.	Brickyard Bar
<b>June 29</b>	Executive Committee	12:00 Noon	Zoom
<b>June 30</b>	Bar ReView: Attorneys Got Talent Final Show	5:30 p.m.	Brickyard Bar
<b>July 6-9</b>	Summer Convention at Loews Coronado		San Diego, CA
<b>July 6</b>	Bar Commission Meeting	1:00 p.m.	San Diego, CA

# TAB 1



# **UTAH STATE BAR DRAFT BUDGET FY 2022/23**

**May 26, 2022**

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## Utah State Bar FY23 Budget Narrative

### Overview

The Utah State Bar's operations consist of 25 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, Bar Journal, NLTP and LPP). 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:

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

Every income and expense transaction at the Bar is assigned to one of the 25 departments and one of 175 (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 FY23 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, NLTP, and Section Support have all been budgeted to break even (plus or minus \$45,000). While CLE is intended to support itself, given the difficulty to hold in-person CLE events in recent years due to the global pandemic, revenues under the current budget are no longer sufficient to cover CLE expenses. We continue to be optimistic that the recent net losses are isolated, however we also recognize that the new normal may actually involve a hybrid model incorporating in-person and virtual attendance.

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 ten fiscal years (except for FY20 due to the COVID-19 pandemic limiting in-person gatherings), have generated a net profit adding to the Bar’s reserves. However, it is anticipated based on historical trends that expense growth will outpace revenue growth around 2031, at which time it may be necessary to 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

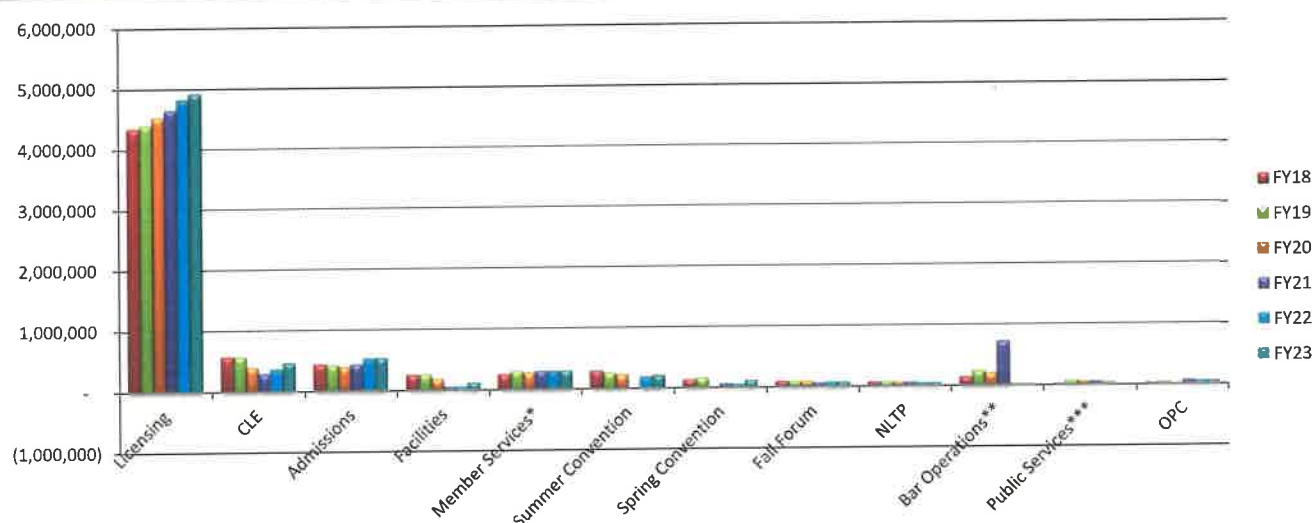
Built into the FY23 budget are the following key changes compared to FY22:

	<b>Anticipated Change over FY2022</b>
<b>Licensing revenue (except late fees)</b>	+2.0%
<b>Admissions revenue</b>	+2.0%
<b>NLTP revenue</b>	+2.0%
<b>Salaries</b>	+5.0%
<b>Health insurance</b>	+5.0%
<b>Dental insurance</b>	+5.0%
<b>Long-term disability and life insurance</b>	+5.0%
<b>Building expenses (utilities, etc.)</b>	+3.0%
<b>Computer maintenance expenses</b>	+5.0%



**Utah State Bar  
FY23 DRAFT Budget  
Revenue by Department**

Revenue	Actual FY18	Actual FY19	Actual FY20	Actual FY21	Projected FY22	Budget FY23	% of Total	Trend
Licensing	4,334,919	4,391,838	4,518,363	4,636,465	4,827,440	4,922,403	70.4%	
CLE	565,080	561,306	391,038	284,997	379,956	480,714	6.9%	
Admissions	434,620	416,220	388,725	430,711	537,120	547,370	7.8%	
Facilities	248,542	250,639	174,911	39,185	69,001	133,993	1.9%	
Member Services*	243,437	289,921	266,954	293,659	309,062	310,750	4.4%	
Summer Convention	283,280	250,465	218,585	-	197,225	220,464	3.2%	
Spring Convention	123,526	154,252	(2,160)	56,617	57,550	124,252	1.8%	
Fall Forum	83,328	78,760	83,224	56,368	87,005	84,660	1.2%	
NLTP	62,017	66,349	53,850	56,034	63,374	64,642	0.9%	
Bar Operations**	136,052	237,287	198,811	723,118	27,959	27,959	0.4%	
Public Services***	14,323	68,654	53,327	51,996	46,569	17,291	0.2%	
OPC	21,288	33,333	13,646	63,656	60,882	61,613	0.9%	
<b>Total</b>	<b>6,550,412</b>	<b>6,799,024</b>	<b>6,359,275</b>	<b>6,692,804</b>	<b>6,663,142</b>	<b>6,996,111</b>	<b>100%</b>	



This table and chart shows the Bar's trended revenue by financial statement category. For the past four years, more than 70% of the Bar's income comes from member license fees. In a normal year, the next largest category of income is from CLE events, then Admissions (the latter two were switched during FY21 and FY22 due to the COVID-19 pandemic). These three functions account for more than 85% of the Bar's income. We are projecting 2% increase to licensing fees and admissions in FY23 compared to FY22, as this is a common trend over recent years. CLE revenue dipped in FY20, FY21 and FY22 due to the pandemic; and we project CLE revenue to be lower than pre-pandemic years in the future, due to the demand for virtual CLE offerings at reduced registration fees.

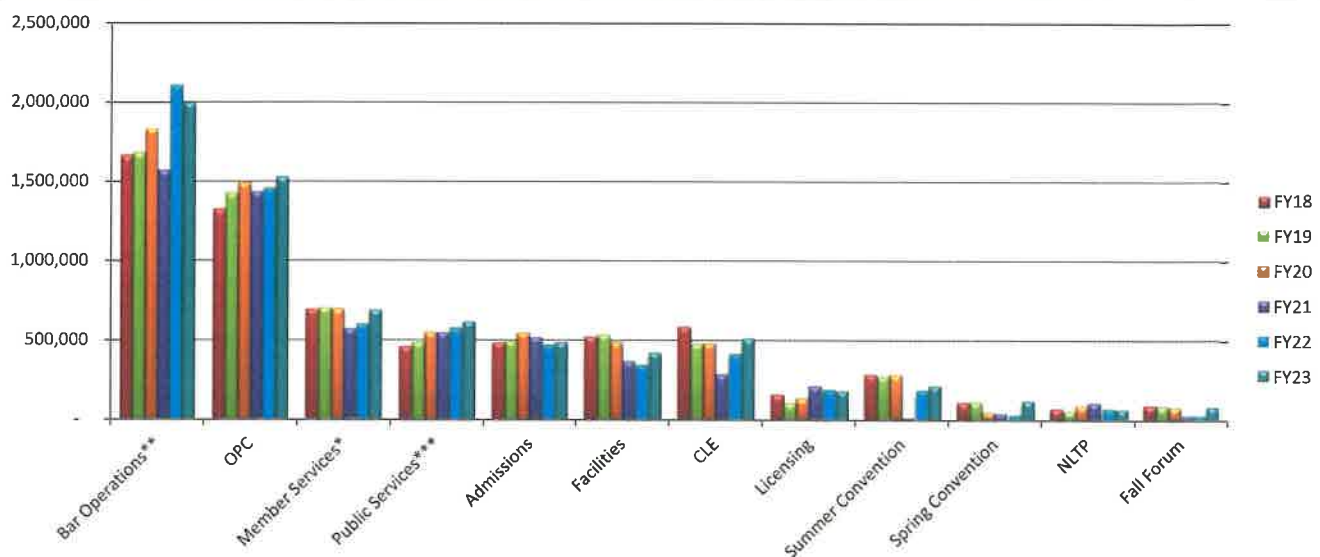
\* Member Services includes the following: Bar Journal, Member Benefits, Section Support, Legislative, Public Education and Young Lawyers Division.

\*\* Bar Operations includes the following: Bar Management, General Counsel, Information Technology, Commission/Special Project.

\*\*\* Public Services includes Committees, Consumer Assistance Program, Access to Justice and Tuesday Night Bar.

**Utah State Bar  
FY23 DRAFT Budget  
Expenses by Department**

Expenses	Actual FY18	Actual FY19	Actual FY20	Actual FY21	Projected FY22	Budget FY23	% of Total	Trend
Bar Operations**	1,664,544	1,681,015	1,832,761	1,566,903	2,110,774	1,998,078	28.6%	
OPC	1,323,817	1,425,811	1,493,149	1,435,479	1,462,184	1,534,494	22.0%	
Member Services*	691,170	699,119	695,992	566,732	607,130	699,770	10.0%	
Public Services***	459,425	485,546	548,405	544,141	580,727	626,762	9.0%	
Admissions	481,022	494,776	543,144	516,333	475,677	494,361	7.1%	
Facilities	519,194	533,973	487,468	365,677	348,138	430,800	6.2%	
CLE	585,023	472,253	478,981	283,726	419,583	519,476	7.4%	
Licensing	157,187	101,711	134,775	210,276	194,887	187,839	2.7%	
Summer Convention	284,030	270,280	282,439	8,687	191,943	220,464	3.2%	
Spring Convention	107,920	112,155	44,632	37,201	34,213	124,252	1.8%	
NLTP	67,839	51,595	86,394	103,690	74,344	69,146	1.0%	
Fall Forum	90,989	84,217	75,596	26,701	31,068	84,660	1.2%	
<b>Total</b>	<b>6,432,161</b>	<b>6,412,452</b>	<b>6,703,737</b>	<b>5,665,547</b>	<b>6,530,671</b>	<b>6,990,101</b>	<b>100%</b>	



This table and chart shows the Bar's trended expenses by financial statement category. OPC and Bar Operations account for half of the Bar's total expenses, and a large majority of those expenses are staff-related. Most departments' expenses dipped in FY21 due to the pandemic, but we see the expenses ticking up slightly in FY22. Even with the lower activity due to the pandemic, staff expenses, building expenses and insurance continue to increase from year to year and we estimate this trend to continue into the next fiscal year as well.

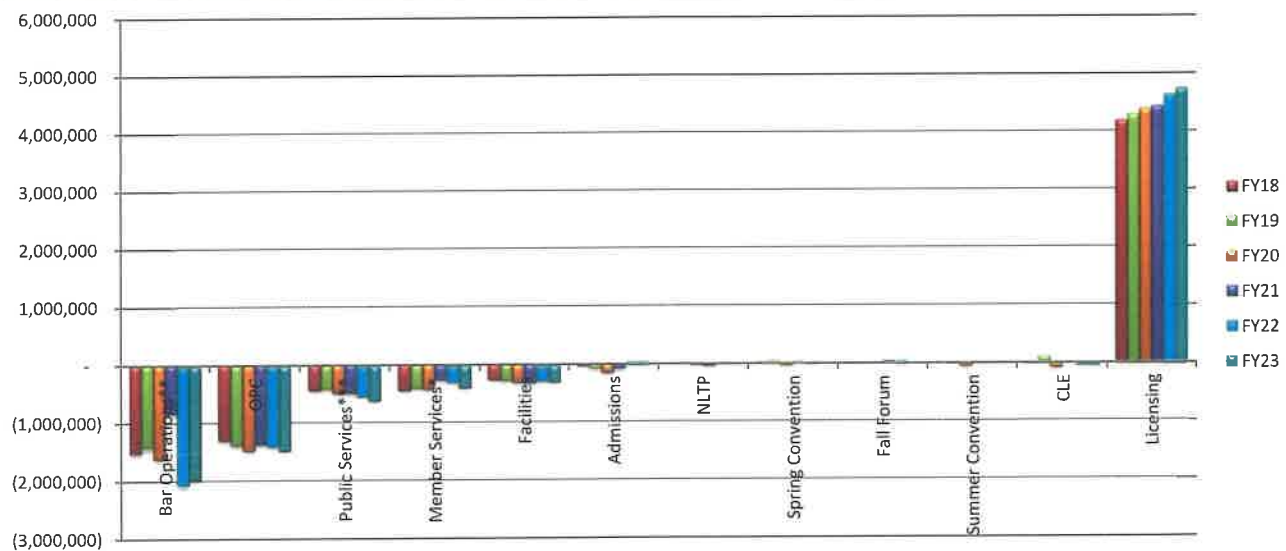
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\*\* Bar Operations includes the following: Bar Management, General Counsel, Information Technology, Commission/Special Project.

\*\*\* Public Services includes Committees, Consumer Assistance Program, Access to Justice and Tuesday Night Bar.

**Utah State Bar  
FY23 DRAFT Budget  
Net Profit (Cost) by Department**

Net profit (cost)	Actual FY18	Actual FY19	Actual FY20	Actual FY21	Projected FY22	Budget FY23	Trend
Bar Operations**	(1,528,492)	(1,443,728)	(1,628,277)	(843,785)	(2,082,816)	(1,970,119)	
OPC	(1,302,529)	(1,392,478)	(1,479,502)	(1,371,823)	(1,401,303)	(1,472,881)	
Public Services***	(445,103)	(416,892)	(495,078)	(492,145)	(534,158)	(609,471)	
Member Services*	(447,733)	(409,198)	(429,038)	(273,073)	(298,069)	(389,021)	
Facilities	(270,652)	(283,334)	(312,557)	(326,492)	(279,137)	(296,806)	
Admissions	(46,402)	(78,556)	(154,419)	(85,623)	61,443	53,009	
NLTP	(5,822)	14,754	(32,544)	(47,656)	(10,969)	(4,504)	
Spring Convention	15,606	42,097	(46,792)	19,416	23,337	-	
Fall Forum	(7,662)	(5,457)	7,628	29,666	55,937	-	
Summer Convention	(750)	(19,815)	(63,854)	(8,687)	5,282	-	
CLE	(19,942)	89,053	(87,943)	1,271	(39,628)	(38,761)	
Licensing	4,177,732	4,290,127	4,383,588	4,426,188	4,632,552	4,734,564	
<b>Total</b>	<b>118,251</b>	<b>386,573</b>	<b>(338,789)</b>	<b>1,027,257</b>	<b>132,471</b>	<b>6,010</b>	



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.

\* Member Services includes the following: Bar Journal, Member Benefits, Section Support, Legislative, Public Education and Young

\*\* Bar Operations includes the following: Bar Management, General Counsel, Information Technology, Commission/Special Project.

\*\*\* Public Services includes Committees, Consumer Assistance Program, Access to Justice and Tuesday Night Bar.

**Utah State Bar**  
**FY23 DRAFT Budget**  
**Top 25 Gross Expense Categories (Based on Budget FY23)**

Top 25 Expense Categories	Actual FY18	Actual FY19	Actual FY20	Actual FY21	Projected FY22	Budget FY23	
Salaries & Benefits	3,389,322	3,540,057	3,862,508	3,918,435	3,903,508	4,294,091	61.43%
Food & Beverage Expenses	587,127	547,784	423,768	29,367	188,826	346,499	4.96%
Building Overhead	205,553	211,111	196,027	185,019	199,788	205,782	2.94%
Depreciation	243,588	241,734	200,810	164,311	145,518	145,518	2.08%
Computer Maintenance	28,232	48,627	60,676	42,437	68,870	143,657 *	2.06%
Travel	132,894	160,198	110,442	8,382	80,022	139,444	1.91%
Copy/Printing Expense	139,012	126,718	135,802	94,182	100,963	133,596	1.99%
Meeting Room Expenses	157,312	142,973	121,102	13,026	62,116	111,976	1.60%
Bar Exam Expenses	104,047	67,368	61,698	68,221	107,019	107,037	1.53%
Other Misc Expense	9,068	46,743	142,716	64,556	103,835	95,043	1.36%
Blomquist Hale	73,946	73,832	73,703	77,738	90,000	90,000	1.21%
Database Expense	51,734	28,437	34,343	57,057	53,570	84,284	1.29%
Telecommunications Expense	68,379	67,736	65,133	75,957	81,347	81,339	1.16%
Insurance Expense	67,438	68,765	70,190	73,741	78,532	78,247	1.12%
LRE Support	65,000	65,000	65,000	64,182	68,364	64,182	0.92%
3rd Party Revenue Sharing	64,158	42,191	60,197	71,092	62,273	62,273	0.89%
Legislative Expenses	44,126	47,615	66,719	60,000	60,000	60,000	0.86%
Credit Card Fees	52,253	50,956	44,123	51,635	55,327	56,299	0.81%
MCLE Fees	44,311	38,718	29,373	39,142	56,771	52,681	0.75%
Casemaker	71,313	72,584	49,645	53,992	54,340	50,000	0.65%
Postage/Mailing Expense	60,459	53,924	55,027	59,449	49,330	49,647	0.71%
Advertising Expenses	48,203	54,435	31,781	3,281	5,670	45,444	0.72%
Audit Expense	31,363	33,546	34,265	35,435	38,143	38,143	0.55%
BJ Commission Expense	28,655	33,339	31,536	41,393	37,456	37,456	0.54%
Retreat	37,428	31,293	20,089	-	22,308	33,300	0.48%
Other	627,238	516,766	657,065	313,519	404,997	384,164	5.50%
<b>Grand Total</b>	<b>6,432,158</b>	<b>6,412,452</b>	<b>6,703,737</b>	<b>5,665,547</b>	<b>6,178,891</b>	<b>6,990,101</b>	<b>100%</b>

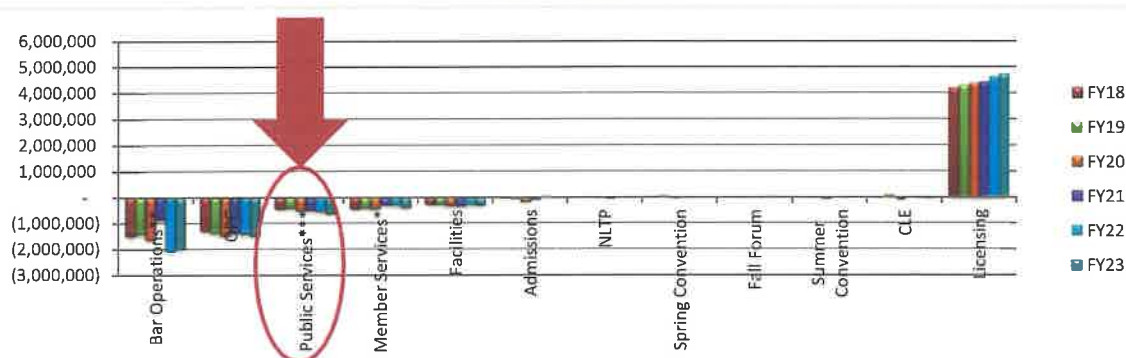
Instead of breaking down expenses based on department, this table categorizes them based on functional expense account across all departments. It reveals the top twenty-five accounts that make up more than 94% of the Bar's spending. Notably, the single largest expense type that accounts for over half of the Bar's spending is staff-related (salaries and benefits). The next largest expense category during normal operations (not during the pandemic) is Food and Beverage Expenses; followed by Building Overhead, Depreciation, and then Computer Maintenance (mostly related to IT services). The expenses in the "Other" category are budgeted to be initially less than \$34,000 during FY23, or 0.5% of total expenses.

\*The increase in Computer Maintenance in FY 23 is due to all Computer and IT Contracts expenses that used to be classified as Outside Consultants were reclassified to Computer Maintenance for clarity.

**Utah State Bar  
FY23 DRAFT Budget  
Public Services**

	Actual	Actual	Actual	Actual	Projected	Draft
	FY18	FY19	FY20	FY21	FY22	Budget
<b>Program Net Cost</b>						
Consumer Assistance Program (1 FTE)	130,618	129,886	136,659	132,054	129,093	135,349
Access to Justice (3 FTEs)	161,515	117,057	172,705	213,114	232,336	300,361
Tuesday Night Bar (moved to virtual FY22)	36,695	34,373	28,081	1,236	276	-
Committees (.5 FTE)	116,274	135,575	157,633	145,741	172,452	173,760
<b>Public Service Programs Net Cost</b>	<b>445,103</b>	<b>416,892</b>	<b>495,078</b>	<b>492,145</b>	<b>534,158</b>	<b>609,471</b>
<b>Other Public Service Expenses Classified Elsewhere:</b>						
In Kind Contributions to UDR, LRE, UCLI and other NFPs	29,853	29,004	17,837	5,879	14,763	14,763
Contribution to And Justice For All	-	-	-	-	250,000	-
Serving Our Seniors - YLD (estimated)	1,145	1,000	1,145	1,000	1,000	800
Wills for Heroes - YLD (estimated)	1,000	1,000	1,100	1,000	750	750
Other YLD Public Service Projects	2,984	-	6,078	5,767	10,750	9,000
Licensed Lawyer (some capitalized FY18-FY20)	27,645	53,100	60,600	6,600	6,600	6,600
Expungement Day Clinic grant	-	3,000	-	-	-	-
Law Day (moved from Committees to CLE event FY22)	-	-	-	-	-	6,000
<b>Total Other Public Service Expenses</b>	<b>62,627</b>	<b>87,104</b>	<b>86,760</b>	<b>20,246</b>	<b>283,863</b>	<b>37,913</b>
<b>Public Services Net Cost</b>	<b>507,730</b>	<b>503,996</b>	<b>581,838</b>	<b>512,391</b>	<b>818,021</b>	<b>647,383</b>

**Net Profit (Cost) By Department**



The above table shows the breakdown of Public Service (Committees, Consumer Assistance Program, Access to Justice and Tuesday Night Bar) 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 9% 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.

Note that Tuesday Night Bar has been moved to an virtual format and therefore incurs very little expenses except staff time. As such, Tuesday Night Bar expenses have been absorbed by the Access to Justice department, which has always been the department that managed the program. Tuesday Night Bar will be phased out as a department and instead will simply be a function of the Access to Justice department.

To review the specific budgets related to the individual departments included in Public Services, please see the supplemental schedules at the following pages: 37 - Committees, 40 - Consumer Assistance Program, 41 - Access to Justice, and 42 - Tuesday Night Bar.

\* Member Services includes the following: Bar Journal, Member Benefits, Section Support, Legislative, Public Education and Young Lawyers Division.

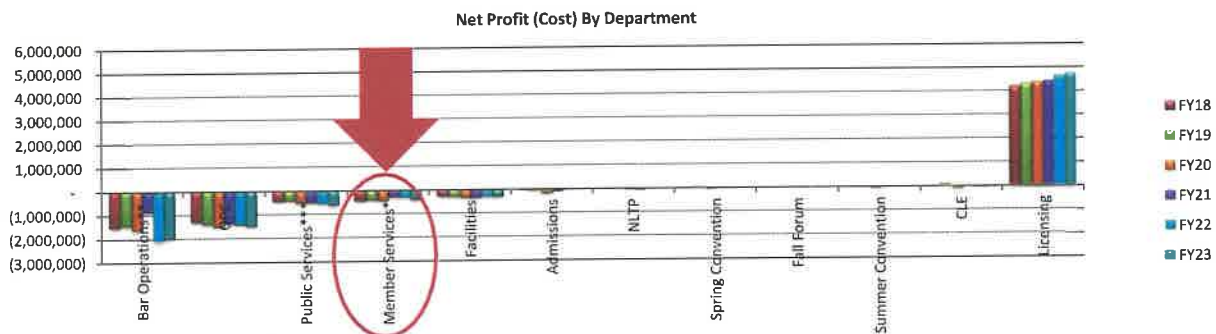
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**Utah State Bar  
FY23 DRAFT Budget  
Member Services**

	Actual FY18	Actual FY19	Actual FY20	Actual FY21	Projected FY22	Draft Budget FY23
<b>Program Net Cost</b>						
Public Education (1 FTE)	166,246	156,577	190,215	99,019	110,784	156,879
Member Benefits (includes Blomquist and Fastcase)	149,330	141,140	122,088	128,732	137,010	132,677
Bar Journal (0.5 FTE)	23,308	(8,890)	17,421	(8,762)	(6,493)	8,418
Legislative	53,283	67,182	77,886	61,613	63,185	73,962
Young Lawyers Division	54,238	50,659	28,660	18,679	35,019	60,000
Section Support (.5 FTE)	1,328	2,530	(7,232)	(26,209)	(41,436)	(42,916)
<b>Member Service Programs Net Cost</b>	<b>447,733</b>	<b>409,198</b>	<b>429,038</b>	<b>273,073</b>	<b>298,069</b>	<b>389,021</b>
<b>Other Member Services Expenses Classified Elsewhere:</b>						
Leadership Academy	12,400	12,471	11,645	-	10,000	10,000
Bar Review	2,219	1,729	431	-	6,000	-
Contribution to Fund for Client Protection (normally collected from members)				-	101,780	-
Breakfast of Champions	(387)	500	-	-	-	-
Practice Portal (some capitalized)	23,100	24,765	-	120	-	-
<b>Total Other Member Service Expenses</b>	<b>37,332</b>	<b>39,465</b>	<b>12,076</b>	<b>120</b>	<b>117,780</b>	<b>10,000</b>
<b>Member Services Net Cost</b>	<b>485,066</b>	<b>448,663</b>	<b>441,114</b>	<b>273,193</b>	<b>415,849</b>	<b>399,021</b>



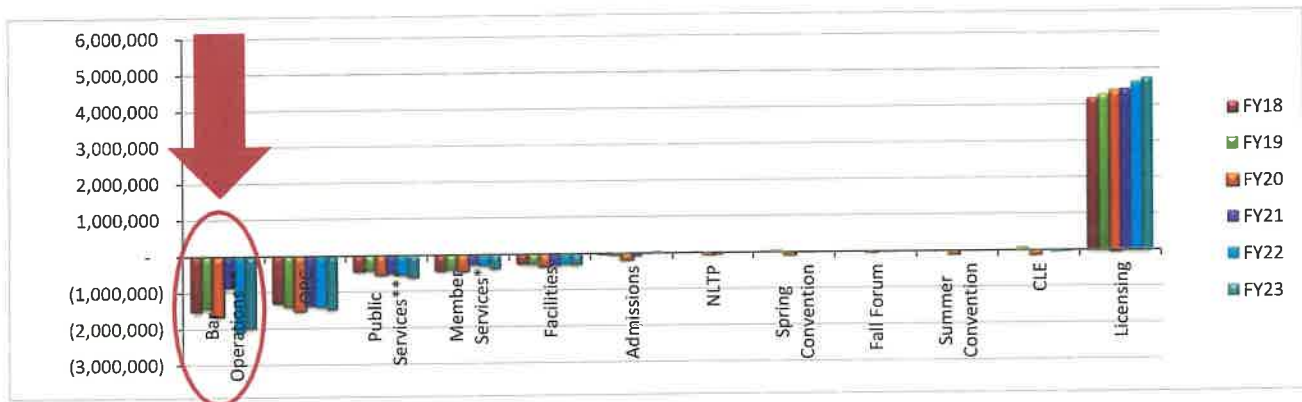
The above table shows the breakdown of Member Services (Bar Journal, Member Benefits, Section Support, Legislative, Public Education and Young Lawyers Division) expenses by program. The bar chart below the table depicts the net profit (cost) of each of the Bar's major functions and is presented to show 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.

To review the specific budgets related to the individual departments included in Member Services, please see the supplemental schedules at the following pages: 36 - Bar Journal, 38 - Member Benefits, 39 - Section Support, 43 - Legislative, 45 - Public Education, and 46 - Young Lawyers Division.

**Utah State Bar  
FY23 DRAFT Budget  
Bar Operations**

	Actual	Actual	Actual	Actual	Projected	Draft Budget
Program Net Cost	FY18	FY19	FY20	FY21	FY22	FY23
Bar Management (4 FTEs)	682,600	605,388	708,543	166,325	721,779	753,296
General Counsel (2.5 FTEs)	302,876	291,705	361,379	292,262	301,767	411,279
Ethics & Discipline Committee (1.5 FTE's)	-	-	-	46,305	193,773	238,841
IT (2 FTEs)	304,039	308,115	318,209	301,817	345,550	347,558
Commission/Special Projects	238,977	238,520	240,146	37,076	519,947	219,146
Bar Operations, net cost	1,528,492	1,443,728	1,628,277	843,785	2,082,816	1,970,119

**Net Profit (Cost) By Department**



Bar Operations is comprised of Bar Management, General Counsel, Ethics & Discipline Committee, 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 (~\$38,000), outside legal counsel for UPL and Bar litigation (~\$30,000), and outside technology support. A detail of spending in Commission/Special Projects follows on a subsequent schedule.

To review the specific budgets related to the individual departments included in Bar Operations, please see the supplemental schedules at the following pages: 24 - Bar Management, 29 - Ethics & Discipline Committee, 30 - General Counsel, 31 - IT, and 44 - Commission/Special Projects.

**Utah State Bar**  
**FY23 DRAFT Budget**  
**Commission/Special Projects Spending Detail**

	Projected					Budget
	FY18	FY19	FY20	FY21	FY22	FY23
ABA Judicial Intern Opportunity Project						3,000
Annual Report	475					
Awards	1,223	2,423	2,537	1,181	5,729	1,000
Bar Review	2,219	1,729	431		6,000	
Commission Convention/CLE Registration Fees	21,765	22,210	15,100		13,000	17,000
Commission Gifts	4,303	1,719	4,385	5,690	3,500	2,000
Commission Meeting Expenses	2,166	2,635	878	22	1,500	1,594
Commission Meeting Food & Beverage	29,158	22,287	15,012	1,105	3,950	7,500
Commission Meeting Room Rental	5,297	4,597	3,345	780	4,488	2,000
Commission Outreach						10,000
Commission Photo	614	625	596	392	431	600
Commission Stationery	2,922	1,743	3,662		2,054	1,500
Contribution to And Justice for All					250,000	
Contribution to the Fund for Client Protection					101,780	
Copies	541	264	723	151	100	350
Diploma Privilege Party						3,000
E&O Insurance	5,112	5,292	5,292	5,800	6,607	5,700
eBulletin	125					
Election Expense	3,256	1,912	2,700	2,717	3,013	3,013
Event Loss		549				
Futures Commission						
Leadership Academy	12,505	12,471	11,645		10,000	10,000
Limited Scope Section	112					
Member Survey			19,000		7,750	
Misc Technology Expense						0
Office Supplies	377	161		182	250	300
Postage/Mailing/Communications	60	353	1,713	539	250	600
Pres/Pres-Elect Monthly "Stipend"	18,000	18,500	25,352	18,000	18,000	18,000
President's expense	3,936	2,446	2,875	163	2,000	2,000
Reg Reform Task Force		5,912	4,571			
Retreat	35,009	31,323	20,089		22,308	30,000
Small Firm Tour	677				1,000	
Sponsorship	1,600	2,170	1,000			
Staff	1,743	872	782	218	937	1,367
Travel - ABA Delegates	15,784	7,214	6,387		2,608	3,600
Travel - ABA Meetings	13,624	10,951	13,626	135	2,313	4,000
Travel - Commission Mtgs	2,801	3,951	1,636		1,500	1,500
Travel - Jackrabbit Bar		1,667			1,722	
Travel - Northwestern Bar Conf	2,538				2,133	1,000
Travel - Other	1,006	1,163	2,533			750
Travel - Spring Convention	10,033	8,748	854			8,000
Travel - Summer Convention	33,667	42,986	18,290		31,500	42,272
Travel - Western States Bar Conf	6,076	19,434	5,130		12,500	7,500
UCLI - Utah Center for Legal Inclusion	253	216	50,000		1,026	
Wipfli review						30,000
Grand Total	238,977	238,520	240,146	37,076	519,947	219,146



**Utah State Bar  
FY23 DRAFT Budget  
Capital Expenditures**

Category	FY18	FY19	FY20	FY21	Projected	
					FY22	Budget FY23
Office, building and meeting room furniture & fixtures	9,355		2,395	2,370	13,000	22,000
Office equipment (copiers, phones, fax, projectors, mail machine, etc.)	669	3,050	14,010	12,744	4,000	4,000
<b>Building Improvements</b>	<b>21,006</b>	<b>33,100</b>	<b>4,074</b>	<b>310,963</b>	<b>45,000</b>	<b>19,000</b>
Computer equipment/servers/software	84,903	110,000	32,499	7,954	40,000	75,000
<b>Total</b>	<b>115,933</b>	<b>146,150</b>	<b>52,978</b>	<b>334,031</b>	<b>102,000</b>	<b>120,000</b>

Annual Maintenance Contracts (expensed over maintenance period):	FY18	FY19	FY20	FY21	Projected	
					FY22	Budget FY23
ClearVantage Annual Maintenance (Euclid)	26,360	26,360	27,678	27,678	27,678	27,678
Licensed Lawyer Annual Hosting Fee (Euclid)	6,600	6,600	6,600	6,600	6,600	6,600
<b>OPC Database (Journal Technologies replaced by Pine Technologies FY22)</b>	<b>9,861</b>	<b>10,627</b>	<b>9,433</b>	<b>4,127</b>	<b>8,000</b>	<b>8,000</b>
Admissions Database Annual Maintenance (Box Lake Networks replaced by ILG FY20)	7,800	3,900	72,000	36,000	37,000	38,000
<b>Network Security (BrainTrace replaced by ClearLink and VLCM FY22)</b>		<b>50,000</b>	<b>22,000</b>	<b>35,000</b>	<b>48,000</b>	<b>49,750</b>
NLTP Database, Annual Hosting (Xinspire)			13,000	10,000	10,000	10,000
<b>Attorney Research Platform (Casemaker replaced by FastCase FY20)</b>			<b>52,250</b>	<b>54,340</b>	<b>55,000</b>	<b>50,000</b>
IT Support and Software (Clearlink)	83,000	85,000	97,000	85,000	90,000	94,500
<b>Block Hours - prepaid (Euclid)</b>		<b>9,900</b>	<b>49,000</b>	<b>14,000</b>	<b>25,000</b>	<b>20,000</b>
ATJ Database, Annual Hosting (Paladin)						7,000
<b>Ethics &amp; Discipline Database, Annual Hosting (Filevine)</b>					<b>5,400</b>	<b>10,000</b>
<b>Total</b>	<b>133,621</b>	<b>192,387</b>	<b>348,961</b>	<b>272,745</b>	<b>312,678</b>	<b>321,528</b>

The first table shows capital expenditures by general category in recent 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. Most purchased software also requires annual maintenance contacts (shown in the second table), which are expensed over the period of the contract and are generally renewed annually.

**Utah State Bar  
FY23 DRAFT Budget  
Projected Cash Reserves**

<b>Projected Cash Reserves, 6/30/22</b>	<b>\$ 5,250,759</b>
Add: FY23 budgeted change in cash	31,528
<b>Projected Cash Reserves, 6/30/23</b>	<b>5,282,287</b>
<b>Board Designated Reserves:</b>	
Operations Reserve (3 months' operations)	1,747,525
<b>Capital Replacement Reserve - Equipment</b>	<b>200,000</b>
Capital Replacement Reserve - Building	600,000
<b>Total Board Designated Reserves</b>	<b>2,547,525</b>
<b>Cash Reserves over Board Designated &amp; Contingency Reserves</b>	<b>\$ 2,734,762</b>

# **SUPPLEMENTAL SCHEDULES**

**Utah State Bar**  
**FY23 Draft Budget - Summary by Department**  
**Based on Unaudited Actual Results through 3/31/22**

	Actual FY 2018	Actual FY 2019	Actual FY 2020	Actual FY 2021	Projected FY 2022	Draft Budget FY 2023	\$ Change 2022 Projected vs 2023 Budget	% Change 2022 Projected vs 2023 Budget
<b>Revenue</b>								
Licensing	4,334,919	4,391,838	4,518,363	4,636,465	4,827,440	4,922,403	94,963	2%
Admissions	434,620	416,220	388,725	430,711	537,120	547,370	10,250	3%
NLTP	62,017	66,349	53,850	56,034	63,374	64,642	1,267	2%
OPC	21,288	33,333	13,646	63,656	60,882	61,613	731	5%
CLE	565,080	561,306	391,038	284,997	379,956	480,714	100,759	26%
Summer Convention	283,280	250,465	218,585	-	197,225	220,464	23,239	11%
Fall Forum	83,328	78,760	83,224	56,368	87,005	84,660	(2,345)	-3%
Spring Convention	123,526	154,252	(2,160)	56,617	57,550	124,252	66,702	-3088%
Member Services*	243,437	289,921	266,954	293,659	309,062	310,750	1,688	1%
Public Services**	14,323	68,654	53,327	51,996	46,569	17,291	(29,278)	-55%
Bar Operations***	136,052	237,287	198,811	723,118	27,959	27,959	-	0%
Facilities	248,542	250,639	174,911	39,185	69,001	133,993	64,992	37%
Total Revenue	6,550,412	6,799,024	6,359,275	6,692,804	6,663,142	6,996,111	332,969	5%
<b>Expenses</b>								
Licensing	157,187	101,711	134,775	210,276	194,887	187,839	(7,048)	-5%
Admissions	481,022	494,776	543,144	516,333	475,677	494,361	18,684	3%
NLTP	67,839	51,595	86,394	103,690	74,344	69,146	(5,198)	-6%
OPC	1,323,817	1,425,811	1,493,149	1,435,479	1,462,184	1,534,494	72,309	5%
CLE	585,023	472,253	478,981	283,726	419,583	519,476	99,892	21%
Summer Convention	284,030	270,280	282,439	8,687	191,943	220,464	28,521	10%
Fall Forum	90,989	84,217	75,596	26,701	31,068	84,660	53,592	71%
Spring Convention	107,920	112,155	44,632	37,201	34,213	124,252	90,039	202%
Member Services*	691,170	699,119	695,992	566,732	607,130	699,770	92,640	13%
Public Services**	459,425	485,546	548,405	544,141	580,727	626,762	46,034	8%
Bar Operations***	1,664,544	1,681,015	1,832,761	1,566,903	2,110,774	1,998,078	(112,696)	-6%
Facilities	519,194	533,973	487,468	365,677	348,138	430,800	82,661	17%
Total Expenses	6,432,161	6,412,452	6,703,737	5,665,547	6,530,671	6,990,101	459,431	7%
<b>Other</b>								
Gain (Loss) on Disposal of Assets	-	-	(5,673)	-	-	-	-	-
<b>Net Profit (Loss)</b>	<b>\$ 118,251</b>	<b>\$ 386,573</b>	<b>\$ (350,135)</b>	<b>\$ 1,027,257</b>	<b>\$ 132,471</b>	<b>\$ 6,010</b>	<b>\$ (126,462)</b>	<b>-95%</b>
<b>Depreciation</b>	<b>243,588</b>	<b>241,734</b>	<b>200,810</b>	<b>164,311</b>	<b>145,518</b>	<b>145,518</b>	<b>-</b>	<b>0%</b>
Cash increase (decrease) from operations	382,948	628,307	(149,325)	1,191,568	277,989	151,528	(126,462)	-45%
Changes in operating assets/liabilities	452,669	512,125	(658,247)	542,422	20,000	20,000	-	0%
Capital expenditures	(115,933)	(146,150)	(48,904)	(334,031)	(102,000)	(120,000)	(18,000)	18%
Net change in cash	\$ 719,684	\$ 994,282	\$ (856,475)	\$ 1,399,959	\$ 195,989	\$ 51,528	\$ (144,462)	-74%

\* Member Services is comprised of Bar Journal, Member Benefits, Section Support, Legislative, Public Education and Young Lawyers Division.

\*\* Public Services is comprised of Committees, Consumer Assistance, Access to Justice, and Tuesday Night Bar.

\*\*\* Bar Operations is comprised of Bar Management, Ethics & Discipline Committee, General Counsel, IT, and Commission/Sp Projects.

**Utah State Bar**  
**FY23 Draft Budget - Summary by Account**  
**Based on Unaudited Actual Results through 3/31/22**

	Actual FY 2018	Actual FY 2019	Actual FY 2020	Actual FY 2021	Projected FY 2022	Draft Budget FY 2023	\$ Change 2022 Projected vs 2023 Budget	% Change 2022 Projected vs 2023 Budget
<b>Revenue</b>								
4001 - Admissions - Student Exam Fees	130,025	124,025	132,275	103,100	143,550	146,421	2,871	2%
4002 - Admissions - Attorney Exam Fees	47,475	45,475	48,350	57,050	67,350	68,697	1,347	2%
4003 - Admissions - Retake Fees	41,225	41,250	36,550	32,800	37,450	38,199	749	2%
4004 - Admissions - Laptop Fees	55,400	51,900	29,100	62,775	81,655	83,288	1,633	2%
4005 - Admissions - Application Forms	-	4,000	6,000	8,200	(850)	(867)	(17)	2%
4006 - Transfer App Fees	32,950	45,000	44,300	45,100	64,700	65,994	1,294	2%
4008 - Attorney - Motion	76,000	46,750	54,400	81,600	85,750	87,465	1,715	2%
4009 - House Counsel	23,800	20,400	12,900	15,300	28,000	28,560	560	2%
4010 - Section/Local Bar Support fees	98,883	99,617	100,364	100,196	102,391	104,439	2,048	2%
4011 - Admissions LPP	-	950	3,825	2,938	1,733	1,739	6	0%
4012 - Admissions Military Spouse	-	-	425	-	-	-	#DIV/0!	
4020 - NLTP Fees	62,850	65,250	53,850	56,850	64,250	65,535	1,285	2%
4021 - Lic Fees > 3 Years	3,572,085	3,636,825	3,696,485	3,756,910	3,855,580	3,932,692	77,112	2%
4022 - Lic Fees < 3 Years	223,540	221,365	201,200	205,390	227,115	231,657	4,542	2%
4023 - Lic Fees - House Counsel	35,040	40,405	44,940	47,810	55,785	56,901	1,116	2%
4024 - Lic Fees LPP	-	-	800	2,150	3,600	3,672	72	2%
4025 - Pro Hac Vice Fees	65,800	79,600	129,525	214,875	222,925	227,384	4,459	2%
4026 - Lic Fees - Inactive/FS	112,380	116,725	120,390	116,560	118,615	120,987	2,372	2%
4027 - Lic Fees - Inactive/NS	206,325	211,425	214,935	219,975	222,890	227,348	4,458	2%
4029 - Prior Year Lic Fees	5,685	6,800	850	-	-	-	#DIV/0!	
4030 - Certs of Good Standing	25,280	27,230	22,870	17,980	22,980	23,440	460	2%
4031 - Enhanced Web Revenue	-	-	-	-	-	-	#DIV/0!	
4039 - Room Rental-All parties	109,925	102,773	72,158	12,344	31,476	51,387	19,911	63%
4042 - Food & Beverage Rev-All Parties	115,796	125,308	79,334	5,539	17,329	62,654	45,325	262%
4043 - Setup & A/V charges-All parties	1,044	1,402	1,145	-	945	701	(244)	-26%
4051 - Meeting - Registration	404,028	399,950	256,829	111,985	281,053	342,219	61,166	22%
4052 - Meeting - Sponsor Revenue	54,150	62,140	33,000	7,250	26,425	58,500	32,075	121%
4053 - Meeting - Vendor Revenue	32,850	27,150	17,750	1,000	19,550	39,950	20,400	104%
4054 - Meeting - Material Sales	2,185	-	-	-	-	-	#DIV/0!	
4055 - Meeting - Sp Ev Registration	16,856	17,377	7,570	-	13,235	3,707	(9,528)	-72%
4060 - E-Filing Revenue	21,809	48,363	12,432	24,853	16,741	16,741	-	0%
4061 - Advertising Revenue	148,172	185,840	169,488	195,978	212,036	212,038	2	0%
4062 - Subscriptions	60	90	90	30	30	30	(2,100)	-17%
4063 - Modest Means revenue	11,225	10,725	10,525	12,400	12,100	10,000	-	0%
4071 - Mem Benefits - Lexis	696	1,473	1,264	1,200	1,279	1,279	-	0%
4072 - Royalty Inc - Bar J, MBNA, LM,M	6,225	6,801	6,849	8,175	11,438	11,438	-	0%
4081 - CLE - Registrations	468,040	451,978	261,754	205,130	217,566	315,000	97,434	45%
4082 - CLE - Video Library Sales	98,348	85,500	121,808	173,086	146,835	146,835	-	0%
4083 - CLE - Material Sales	-	-	-	-	-	-	#DIV/0!	
4084 - Business Law Book Sales	6,856	3,315	-	-	-	-	#DIV/0!	
4090 - Tenant Rent	21,672	21,086	22,258	21,232	19,252	19,252	-	0%
4093 - Law Day Revenue	3,570	2,700	-	-	2,500	2,500	-	0%
4095 - Miscellaneous Income	8,718	20,549	9,073	27,665	22,569	10,212	(12,358)	-55%
4096 - Late Fees	96,850	62,330	86,200	54,095	102,450	102,450	-	0%
4103 - In - Kind Revenue - UDR	1,806	2,318	3,305	23	-	-	#DIV/0!	
4120 - Grant Income	-	55,219	41,739	695,386	27,178	-	(27,178)	-100%
4151 - ILM Realized Gains / Losses	124,366	176,875	139,808	49,282	37,404	37,404	-	0%
4152 - ILM Interest Income	(5,445)	(903)	7,898	7,371	6,283	6,283	-	0%
4153 - ILM Unrealized Gains / Losses	(6,938)	8,528	32,909	(35,781)	(33,743)	(33,743)	-	0%
4155 - General Interest Income	302	1,250	1,371	604	357	357	-	0%
4200 - Seminar Profit/Loss	(7,496)	33,895	8,386	(33,600)	65,387	65,370	(18)	0%
<b>Total Revenue</b>	<b>6,550,412</b>	<b>6,799,024</b>	<b>6,359,275</b>	<b>6,692,804</b>	<b>6,663,142</b>	<b>6,996,111</b>	<b>332,969</b>	<b>5%</b>
<b>Expenses</b>								
Program Services								
5001 - Meeting Facility-external only	42,646	41,449	13,505	1,914	39,239	45,839	6,600	17%
5002 - Meeting facility-internal only	67,130	59,628	45,345	11,074	15,581	26,018	10,437	67%
5013 - ExamSoft	20,311	20,232	19,110	15,471	33,746	33,764	19	0%
5014 - Questions	79,436	40,701	35,998	52,750	73,183	73,183	-	0%
5015 - Investigations	300	425	600	1,006	1,575	1,600	25	2%
5016 - Credit Checks	2,273	2,058	1,930	2,534	2,364	2,364	-	0%
5017 - Medical Exam	240	160	160	320	800	800	-	0%
5025 - Temp Labor/Proctors	4,300	6,435	6,590	-	90	90	-	0%
5030 - Speaker Fees & Expenses	29,139	15,635	9,667	6,500	14,159	12,887	(1,273)	-9%
5031 - Speaker Reimb. - Receipt Req'd	20,528	9,607	16,880	-	-	13,170	13,170	#DIV/0!
5035 - Awards	5,068	7,388	9,411	7,568	11,556	3,770	(7,786)	-67%
5037 - Grants/ contributions - general	11,700	8,840	9,000	6,796	367,076	18,500	(348,576)	-95%
5040 - Witness & Hearing Expense	639	1,606	1,498	(16)	389	389	-	0%
5041 - Process Serving	732	1,211	1,049	282	607	607	-	0%
5042 - Operations Audit	-	-	-	-	-	30,000	30,000	#DIV/0!
5045 - Bar Anniversary	-	-	-	-	-	-	#DIV/0!	
5046 - Court Reporting	1,897	75	-	1,596	15	15	-	0%
5047 - Casemaker	71,313	72,584	49,645	53,992	54,340	50,000	(4,340)	-8%
5055 - Legislative Expense	44,126	47,615	66,719	60,000	60,000	60,000	-	0%
5060 - Program Special Activities	-	-	2,595	30	4,611	-	(4,611)	-100%
5061 - LRE - Bar Support	65,000	65,000	65,000	64,182	68,364	64,182	(4,182)	-6%
5062 - Law Day	12,339	11,652	5,975	-	2,500	9,400	6,900	276%
5063 - Special Event Expense	84,047	82,330	56,192	6,829	27,166	21,223	(5,943)	-22%
5064 - MCLE Fees Paid	44,311	38,718	29,373	39,142	56,771	52,681	(4,091)	-7%
5070 - Equipment Rental	47,536	41,896	62,252	38	7,296	40,118	32,822	450%
5075 - Food & Bev-external costs only	508,871	469,643	371,002	19,245	171,400	307,856	136,457	80%
5076 - Food & beverage - internal only	68,291	67,421	45,772	7,396	13,483	32,963	19,479	144%
5079 - Soft Drinks	9,965	10,720	6,994	2,726	3,943	5,680	1,737	44%
5085 - Misc. Program Expense	10,096	6,619	8,613	1,298	1,645	2,890	1,245	76%
5090 - Commission Expense	28,655	33,339	31,536	41,393	37,456	37,456	-	0%
5095 - Wills for Heroes	1,676	969	482	360	965	1,250	285	30%
5096 - UDR Support	-	-	-	-	-	-	#DIV/0!	



**Utah State Bar**  
**FY23 Draft Budget - Summary by Account**  
**Based on Unaudited Actual Results through 3/31/22**

	Actual FY 2018	Actual FY 2019	Actual FY 2020	Actual FY 2021	Projected FY 2022	Draft Budget FY 2023	\$ Change 2022 Projected vs 2023 Budget	% Change 2022 Projected vs 2023 Budget
5099 - Blomquist Hale	73,946	73,832	73,703	77,738	90,000	90,000	-	0%
5501 - Books Purchased-BFB	-	-	-	-	-	-	-	#DIV/0!
5702 - Lodging	-	-	-	-	-	-	-	#DIV/0!
5702 - Travel - Lodging	56,913	60,715	61,850	7,065	27,774	51,019	23,245	84%
5703 - Transportation	-	-	-	-	-	2,000	2,000	#DIV/0!
5703 - Travel - Transportation	-	-	-	-	-	-	-	#DIV/0!
5703 - Travel - Transportation/Parking	16,400	20,818	21,864	282	6,840	14,163	7,323	107%
5704 - Mileage Reimbursement	-	-	-	-	-	-	-	#DIV/0!
5704 - Travel - Mileage Reimbursement	12,585	17,682	6,927	1,035	3,725	8,885	5,161	139%
5705 - Per Diems	-	-	-	-	-	300	300	#DIV/0!
5705 - Travel - Per Diems	6,131	4,949	4,709	-	3,133	4,326	1,193	38%
5706 - Meals	-	-	-	-	-	-	-	#DIV/0!
5706 - Travel - Meals	1,479	1,542	109	-	-	1,250	1,250	#DIV/0!
5707 - Travel - Commission Mtgs	39,386	54,493	14,983	-	38,550	52,500	13,950	36%
5805 - ABA Annual Meeting	21,806	19,714	14,469	-	225	4,173	3,948	1755%
5810 - ABA Mid Year Meeting	23,465	12,735	19,896	100	2,838	8,005	5,167	182%
5815 - Commission/Education	24,783	26,473	15,245	1,287	16,287	19,500	3,213	20%
5820 - ABA Annual Delegate	16,284	10,281	10,128	-	2,608	6,600	3,992	153%
5830 - Western States Bar Conference	13,659	29,064	7,494	205	6,505	8,959	2,454	38%
5840 - President's Expense	19,687	20,403	28,197	18,163	20,000	20,000	-	0%
5841 - President's Reimbursement	5,554	1,785	2,899	-	-	-	-	#DIV/0!
5845 - Reg Reform Task Force	-	6,012	4,571	-	-	-	-	#DIV/0!
5850 - Leadership Academy	12,400	12,471	11,645	200	10,200	10,200	0	0%
5855 - Bar Review	2,416	1,729	431	-	6,000	-	(6,000)	-100%
5860 - Commission Mtg Travel	-	-	-	-	-	-	-	#DIV/0!
5865 - Retreat	37,428	31,293	20,089	-	22,308	33,300	10,992	49%
5866 - Wellbeing Committee	-	18,453	50,978	50,733	74,931	76,311	1,380	2%
5867 - Bar Membership Survey	-	-	19,000	-	7,750	-	(7,750)	-100%
5868 - UCLI Support	-	-	50,000	-	-	-	-	#DIV/0!
5960 - Overhead Allocation - Seminars	-	-	-	(3,404)	-	17,115	17,115	#DIV/0!
5970 - Event Revenue Sharing - 3rd Pty	64,158	42,191	60,197	71,092	62,273	62,273	-	0%
Total Program Services Expenses	1,731,045	1,630,590	1,472,279	628,920	1,472,267	1,439,575	(32,692)	-2%
Salaries & Benefits	-	-	-	-	-	-	-	-
5510 - Salaries/Wages	2,642,547	2,765,253	3,024,156	3,057,778	3,038,664	3,326,639	287,975	9%
5605 - Payroll Taxes	196,232	206,499	226,540	234,952	248,167	272,483	24,316	10%
5610 - Health Insurance	232,692	250,782	267,945	278,473	274,510	305,955	31,446	11%
5620 - Health Ins/Medical Reimb	4,960	6,040	3,674	7,500	6,645	6,727	81	1%
5630 - Dental Insurance	14,299	15,136	14,928	15,237	16,043	18,529	2,486	15%
5640 - Life & LTD Insurance	16,853	17,661	18,335	19,788	20,116	23,816	3,700	18%
5645 - Workman's Comp Insurance	2,544	2,487	2,832	2,733	2,961	2,961	-	0%
5650 - Retirement Plan Contributions	235,389	231,773	261,765	276,136	271,792	311,425	39,633	15%
5655 - Retirement Plan Fees & Costs	20,577	19,208	19,785	18,337	14,000	14,000	-	0%
5660 - Training/Development	19,226	21,559	18,261	3,378	6,056	7,002	946	16%
Total Salaries/Benefit Expenses	3,385,320	3,536,399	3,858,222	3,914,313	3,898,955	4,289,538	390,583	10%
General & Administrative	-	-	-	-	-	-	-	-
4094 - Copy/Print revenue	-	-	-	-	-	-	938	5%
7025 - Office Supplies	21,389	25,395	25,724	14,976	17,188	18,126	6,085	233%
7033 - Operating Meeting Supplies	21,998	23,675	17,400	1,822	2,615	8,700	317	1%
7035 - Postage/Mailing, net	60,459	53,924	55,027	59,449	49,330	49,647	32,634	27%
7040 - Copy/Printing Expense	165,273	151,973	155,404	110,954	119,558	152,191	-	#DIV/0!
7040 - Copy/Printing Expense - Other	-	-	-	-	-	-	-	0%
7041 - Copy/Print revenue	(26,262)	(25,255)	(19,602)	(16,772)	(18,595)	(18,595)	(1,191)	-6%
7045 - Internet Service	20,758	13,868	8,724	10,603	19,152	17,960	74,787	109%
7050 - Computer Maintenance	28,232	48,627	60,676	42,437	68,870	143,657	(625)	-3%
7055 - Computer Supplies & Small Equip	7,426	15,274	15,892	15,750	21,614	20,989	30,714	57%
7089 - Membership Database Fees	51,734	28,437	34,343	57,057	53,570	84,284	(140)	0%
7095 - Fax Equip & Supplies	(67)	-	(25)	(7)	-	-	1,183	2%
7100 - Telephone	47,688	53,868	56,434	65,361	62,335	63,518	39,774	701%
7105 - Advertising	48,203	54,435	31,781	3,281	5,670	45,444	-	#DIV/0!
7106 - Public Notification	608	1,149	465	290	-	-	5,000	200%
7107 - Production Costs	-	-	3,000	-	2,500	7,500	2,330	9%
7110 - Publications/Subscriptions	18,486	22,262	25,729	28,144	24,545	26,875	-	#DIV/0!
7115 - Public Relations	50,280	-	49,997	-	-	-	562	3%
7120 - Membership/Dues	12,798	10,209	11,414	10,858	16,554	17,117	(0)	0%
7135 - Bank Service Charges	1,296	1,111	899	938	800	800	-	0%
7136 - ILM Service Charges	16,892	17,698	18,048	17,944	20,541	20,541	-	#DIV/0!
7138 - Bad debt expense	-	-	0	-	-	-	972	1%
7140 - Credit Card Merchant Fees	109,131	107,682	103,843	120,507	121,879	122,851	-	#DIV/0!
7140 - Credit Card Merchant Fees - Other	-	-	-	-	-	-	-	0%
7141 - Credit Card surcharge	(56,878)	(56,726)	(59,720)	(68,871)	(66,551)	(66,551)	-	0%
7145 - Commission Election Expense	3,256	1,912	2,693	2,717	3,013	3,013	(907)	-2%
7150 - E&O/Off & Dir Insurance	50,947	51,519	51,951	53,811	57,800	56,893	-	0%
7160 - Audit Expense	31,363	33,546	34,265	35,435	38,143	38,143	4	2%
7170 - Lobbying Rebates	140	180	140	227	209	214	(98,647)	-91%
7175 - O/S Consultants	107,887	74,541	168,444	150,458	108,108	9,461	(16,580)	-62%
7176 - Bar Litigation	22,356	6,374	22,245	10,450	26,580	10,000	20,000	#DIV/0!
7177 - UPL	1,139	8,302	41,141	1,564	-	-	-	#DIV/0!
7178 - Offsite Storage/Backup	4,228	11,616	3,889	-	-	-	-	0%
7179 - Payroll Adm Fees	2,826	2,885	3,169	3,126	2,973	2,973	-	0%
7180 - Administrative Fee Expense	1,176	773	1,118	996	1,580	1,580	-	0%
7190 - Lease Interest Expense	701	770	573	364	364	364	-	#DIV/0!
7191 - Lease Sales Tax Expense	88	-	-	-	-	-	-	-13%
7195 - Other Gen & Adm Expense	4,092	15,345	15,245	13,307	18,444	16,019	(2,426)	12%
Total General & Administrative Expenses	829,644	755,367	940,323	747,175	778,648	873,572	94,924	12%
In Kind Expenses	-	-	-	-	-	-	-	-

**Utah State Bar**  
**FY23 Draft Budget - Summary by Account**  
**Based on Unaudited Actual Results through 3/31/22**

	Actual FY 2018	Actual FY 2019	Actual FY 2020	Actual FY 2021	Projected FY 2022	Draft Budget FY 2023	\$ Change 2022 Projected vs 2023 Budget	% Change 2022 Projected vs 2023 Budget
7103 - InKind Contrib-UDR & all other	20,517	20,004	17,837	5,879	14,763	14,763	-	0%
<b>Building Overhead</b>								
6015 - Janitorial Expense	30,155	29,784	25,362	17,004	25,923	26,701	778	3%
6020 - Heat	21,580	20,557	17,908	21,226	21,616	22,265	648	3%
6025 - Electricity	44,151	45,511	41,164	41,502	42,705	43,986	1,281	3%
6030 - Water/Sewer	5,426	7,483	7,738	6,188	5,963	6,142	179	3%
6035 - Outside Maintenance	12,438	13,190	16,474	14,046	16,787	17,291	504	3%
6040 - Building Repairs	10,006	23,160	17,002	20,897	25,118	25,871	754	3%
6045 - Bldg Mtncs Contracts	38,817	35,578	39,017	29,488	27,247	28,064	817	3%
6050 - Bldg Mtncs Supplies	5,282	5,235	-	-	-	-	#DIV/0!	
6055 - Real Property Taxes	37,207	30,172	30,945	34,272	34,053	35,074	1,022	3%
6060 - Personal Property Taxes	489	440	416	397	375	387	11	3%
6065 - Bldg Insurance/Fees	16,491	17,246	18,239	19,930	20,733	21,354	622	3%
6070 - Building & Improvements Depr	51,739	54,146	53,835	68,193	80,543	80,543	-	0%
6075 - Furniture & Fixtures Depr	15,612	13,584	8,779	4,453	4,196	4,196	-	0%
7065 - Computers, Equip & Sftwre Depr	176,237	174,003	138,196	91,665	60,779	60,779	-	0%
<b>Total Building Overhead Expenses</b>	<b>465,632</b>	<b>470,092</b>	<b>415,076</b>	<b>369,260</b>	<b>366,038</b>	<b>372,654</b>	<b>6,616</b>	<b>2%</b>
<b>Total Expenses</b>	<b>6,432,158</b>	<b>6,412,452</b>	<b>6,703,737</b>	<b>5,665,547</b>	<b>6,530,671</b>	<b>6,990,101</b>	<b>459,431</b>	<b>7%</b>
<b>Other Income/Expense</b>								
4300 - Gain (Loss) - Sales of Assets	-	-	(5,673)	-	-	-	-	-
<b>Net Profit (Loss)</b>	<b>\$ 118,254</b>	<b>\$ 386,573</b>	<b>\$ (350,135)</b>	<b>\$ 1,027,257</b>	<b>\$ 132,471</b>	<b>\$ 6,010</b>	<b>\$ (126,462)</b>	<b>-95%</b>

**Utah State Bar**  
**FY23 Draft Budget**  
**Based on Unaudited Actual Results through 3/31/22**  
**01 - Licensing**

	Actual FY 2018	Actual FY 2019	Actual FY 2020	Actual FY 2021	Projected FY 2022	Draft Budget FY 2023	\$ Change 2022 Projected vs 2023 Budget	% Change 2022 Projected vs 2023 Budget
<b>Revenue</b>								
4010 Section/Local Bar Support fees	17,039	17,808	17,128	17,292	17,992	18,352	360	2%
4020 NLTP Fees	-	-	-	750	-	-	-	#DIV/0!
4021 Lic Fees > 3 Years	3,572,085	3,636,825	3,696,485	3,756,910	3,855,580	3,932,692	77,112	2%
4022 Lic Fees < 3 Years	223,540	221,365	201,200	205,390	227,115	231,657	4,542	2%
4023 Lic Fees - House Counsel	35,040	40,405	44,940	47,810	55,785	56,901	1,116	2%
4024 Lic Fees LPP	-	-	800	2,150	3,600	3,672	72	2%
4025 Pro Hac Vice Fees	65,750	79,600	129,525	214,875	222,925	227,384	4,459	2%
4026 Lic Fees - Inactive/FS	112,380	116,725	120,390	116,560	118,615	120,987	2,372	2%
4027 Lic Fees - Inactive/NS	206,325	211,425	214,935	219,975	222,890	227,348	4,458	2%
4029 Prior Year Lic Fees	5,685	6,800	850	-	-	-	-	#DIV/0!
4030 Certs of Good Standing	25,280	27,230	22,870	17,980	22,980	23,440	460	2%
4061 Advertising Revenue	-	-	-	120	120	122	2	2%
4095 Miscellaneous Income	695	675	615	245	100	102	2	2%
4096 Late Fees	71,100	32,030	64,800	32,995	77,850	77,850	-	0%
Total Revenue	4,334,919	4,390,888	4,514,538	4,633,052	4,825,552	4,920,506	94,954	2%
<b>Expenses</b>								
<b>Salaries &amp; Benefits</b>								
5510 Salaries/Wages	43,829	28,372	33,047	44,839	53,118	55,774	2,656	5%
5605 Payroll Taxes	2,961	1,824	2,589	3,537	4,174	4,383	209	5%
5610 Health Insurance	5,019	5,384	5,596	5,669	5,836	6,128	292	5%
5620 Health Ins/Medical Reimb	49	25	-	-	-	-	-	#DIV/0!
5630 Dental Insurance	429	433	434	439	454	476	23	5%
5640 Life & LTD Insurance	485	454	458	466	510	536	26	5%
5645 Workman's Comp Insurance	-	-	-	-	-	-	-	#DIV/0!
5650 Retirement Plan Contributions	3,765	2,105	3,147	4,295	5,019	5,270	251	5%
5655 Retirement Plan Fees & Costs	710	663	614	544	402	402	-	0%
5660 Training/Development	250	45	45	-	-	-	-	#DIV/0!
Total Salaries/Benefit Expenses	57,497	39,304	45,931	59,789	69,513	72,968	3,456	5%
<b>General &amp; Administrative</b>								
7025 Office Supplies	790	541	870	337	618	618	-	0%
7035 Postage/Mailing, net	10,584	6,028	6,014	5,454	5,600	5,600	-	0%
7040 Copy/Printing Expense	3,923	2,399	2,425	2,654	2,616	2,616	-	0%
7041 Copy/Print revenue	-	-	-	273	-	-	-	#DIV/0!
7050 Computer Maintenance	1,862	3,767	10,340	5,972	4,575	7,077	2,502	55%
7055 Computer Supplies & Small Equip	71	130	409	510	562	590	28	5%
7089 Membership Database Fees	7,664	-	-	-	-	-	-	#DIV/0!
7095 Fax Equip & Supplies	-	-	-	(10)	-	-	-	#DIV/0!
7100 Telephone	1,780	1,263	1,263	1,445	1,402	1,402	-	0%
7110 Publications/Subscriptions	80	-	-	133	-	-	-	#DIV/0!
7135 Bank Service Charges	-	-	-	10	(8)	(8)	(0)	1%
7140 Credit Card Merchant Fees	75,568	72,067	63,203	90,349	81,339	81,339	-	0%
7141 Credit Card surcharge	(56,878)	(56,726)	(59,720)	(68,997)	(66,407)	(66,407)	-	0%
7170 Lobbying Rebates	133	-	-	-	-	-	-	#DIV/0!
7175 O/S Consultants	-	280	1,919	2,110	1,776	-	(1,776)	-100%
Total General & Administrative Expenses	45,541	29,750	26,723	40,241	32,073	32,827	754	2%
<b>Building Overhead</b>								
6015 Janitorial Expense	506	627	526	340	559	576	17	3%
6020 Heat	376	432	369	424	481	496	14	3%
6025 Electricity	742	957	852	829	900	927	27	3%
6030 Water/Sewer	88	157	161	124	124	128	4	3%
6035 Outside Maintenance	243	277	336	281	369	380	11	3%
6040 Building Repairs	180	487	350	356	455	469	14	3%
6045 Bldg Mtncce Contracts	653	748	802	589	587	604	18	3%
6065 Bldg Insurance/Fees	278	363	376	398	414	427	12	3%
6070 Building & Improvements Depre	874	1,139	1,109	1,363	1,726	1,726	-	0%
6075 Furniture & Fixtures Depre	264	286	181	89	88	88	-	0%
7065 Computers, Equip & Sftwre Depre	2,994	3,660	2,845	1,832	1,298	1,298	-	0%
Total Building Overhead Expenses	7,312	9,244	7,906	6,625	7,001	7,118	117	2%
<b>Total Expenses</b>	<b>110,350</b>	<b>78,298</b>	<b>80,560</b>	<b>106,656</b>	<b>108,587</b>	<b>112,913</b>	<b>4,326</b>	<b>5%</b>
<b>Net Profit (Loss)</b>	<b>\$ 4,224,569</b>	<b>\$ 4,312,590</b>	<b>\$ 4,433,978</b>	<b>\$ 4,526,396</b>	<b>\$ 4,716,965</b>	<b>\$ 4,807,593</b>	<b>\$ 90,628</b>	<b>2%</b>



**Utah State Bar**  
**FY23 Draft Budget**  
**Based on Unaudited Actual Results through 3/31/22**  
**02 - Admissions**

	Actual FY 2018	Actual FY 2019	Actual FY 2020	Actual FY 2021	Projected FY 2022	Draft Budget FY 2023	\$ Change 2022 Projected vs 2023 Budget	% Change 2022 Projected vs 2023 Budget
<b>Revenue</b>								
4001 - Admissions - Student Exam Fees	130,025	124,025	132,275	103,100	143,550	146,421	2,871	2%
4002 - Admissions - Attorney Exam Fees	47,475	45,475	48,350	57,050	67,350	68,697	1,347	2%
4003 - Admissions - Retake Fees	41,225	41,250	36,550	32,800	37,450	38,199	749	2%
4004 - Admissions - Laptop Fees	55,400	51,900	29,100	62,200	81,200	82,824	1,624	2%
4005 - Admissions - Application Forms	-	4,000	6,000	8,200	(850)	(867)	(17)	2%
4006 - Transfer App Fees	32,950	45,000	44,300	45,100	64,700	65,994	1,294	2%
4008 - Attorney - Motion	76,000	46,750	54,400	81,600	85,750	87,465	1,715	2%
4009 - House Counsel	23,800	20,400	12,900	15,300	28,000	28,560	560	2%
4011 - Admissions LPP	-	-	-	200	300	306	6	2%
4012 - Admissions Military Spouse	-	-	425	-	-	-	-	#DIV/0!
4095 - Miscellaneous Income	1,945	7,120	3,025	4,161	5,070	5,171	101	2%
4096 - Late Fees	25,750	30,300	21,400	21,000	24,600	24,600	-	0%
<b>Total Revenue</b>	<b>434,620</b>	<b>416,220</b>	<b>389,725</b>	<b>430,711</b>	<b>537,120</b>	<b>547,370</b>	<b>10,250</b>	<b>2%</b>
<b>Expenses</b>								
<b>Program Services</b>								
5001 - Meeting Facility-external only	12,874	14,523	7,586	-	7,969	9,961	1,992	25%
5002 - Meeting facility-internal only	6,761	6,394	5,394	6,144	5,286	6,608	1,322	25%
5013 - ExamSoft	20,311	20,232	19,110	14,542	32,816	32,816	-	0%
5014 - Questions	42,736	40,701	35,998	17,540	46,766	46,766	-	0%
5015 - Investigations	190	260	128	489	825	825	-	0%
5016 - Credit Checks	2,273	2,058	1,930	2,534	2,364	2,364	-	0%
5017 - Medical Exam	240	160	160	320	800	800	-	0%
5025 - Temp Labor/Proctors	4,300	5,410	6,100	-	-	-	-	#DIV/0!
5035 - Awards	-	-	-	65	-	-	-	#DIV/0!
5046 - Court Reporting	1,746	75	-	1,563	-	-	-	#DIV/0!
5064 - MCLE Fees Paid	-	-	-	-	192	192	-	0%
5070 - Equipment Rental	8,644	8,302	5,655	-	-	-	-	#DIV/0!
5075 - Food & Bev-external costs only	3,409	9,303	3,941	237	741	926	185	25%
5076 - Food & beverage - internal only	8,376	8,262	6,029	4,936	3,444	4,305	861	25%
5079 - Soft Drinks	-	-	-	36	-	-	-	#DIV/0!
5085 - Misc. Program Expense	-	-	-	1,298	794	794	-	0%
5702 - Travel - Lodging	1,290	-	2,030	-	948	948	-	0%
5703 - Travel - Transportation/Parking	2,169	784	3,323	-	860	-	(860)	-100%
5704 - Travel - Mileage Reimbursement	86	88	342	534	340	267	(74)	-22%
5705 - Travel - Per Diem	1,013	331	786	-	308	-	(308)	-100%
5706 - Travel - Meals	-	221	-	-	-	-	-	#DIV/0!
<b>Total Program Services Expenses</b>	<b>116,417</b>	<b>117,103</b>	<b>98,511</b>	<b>50,237</b>	<b>104,453</b>	<b>107,572</b>	<b>3,118</b>	<b>3%</b>
<b>Salaries &amp; Benefits</b>								
5510 - Salaries/Wages	246,806	253,197	243,207	292,892	224,130	235,336	11,206	5%
5605 - Payroll Taxes	18,879	19,528	19,152	25,045	20,542	21,569	1,027	5%
5610 - Health Insurance	20,411	20,549	23,833	25,442	14,446	15,168	722	5%
5620 - Health Ins/Medical Reimb	22	26	7	623	337	337	-	0%
5630 - Dental Insurance	1,286	1,335	1,251	1,345	929	975	46	5%
5640 - Life & LTD Insurance	1,571	1,609	1,564	1,662	996	1,046	50	5%
5650 - Retirement Plan Contributions	24,129	21,561	19,915	25,099	21,126	22,183	1,056	5%
5655 - Retirement Plan Fees & Costs	2,130	1,499	1,380	1,901	1,342	1,342	-	0%
5660 - Training/Development	995	1,445	560	-	-	280	280	#DIV/0!
<b>Total Salaries/Benefit Expenses</b>	<b>316,229</b>	<b>320,749</b>	<b>310,869</b>	<b>374,010</b>	<b>283,848</b>	<b>298,236</b>	<b>14,388</b>	<b>5%</b>
<b>General &amp; Administrative</b>								
7025 - Office Supplies	1,053	1,139	853	624	802	802	-	0%
7035 - Postage/Mailing, net	1,440	1,534	1,128	387	220	220	-	0%
7040 - Copy/Printing Expense	5,599	4,572	3,755	5,798	4,433	4,433	-	0%
7050 - Computer Maintenance	2,824	2,836	4,593	3,018	4,413	11,517	7,103	161%
7055 - Computer Supplies & Small Equip	139	463	953	839	852	-	(852)	-100%
7089 - Membership Database Fees	3,900	3,900	18,550	36,000	33,498	33,498	-	0%
7095 - Fax Equip & Supplies	-	-	(25)	-	-	-	-	#DIV/0!
7100 - Telephone	3,347	3,789	3,791	4,336	4,205	4,205	-	0%
7105 - Advertising	-	75	75	49	49	49	-	0%
7110 - Publications/Subscriptions	147	216	226	623	259	259	-	0%
7120 - Membership/Dues	735	720	715	725	355	355	-	0%
7140 - Credit Card Merchant Fees	9,250	9,038	9,034	9,807	10,665	10,665	-	0%
7150 - E&O/Off & Dir Insurance	4,072	4,094	4,137	4,221	4,459	4,459	-	0%
7175 - O/S Consultants	-	841	65,758	8,716	5,371	-	(5,371)	-100%
7195 - Other Gen & Adm Expense	-	-	20	102	-	-	-	#DIV/0!
<b>Total General &amp; Administrative Expenses</b>	<b>32,506</b>	<b>33,217</b>	<b>113,561</b>	<b>75,245</b>	<b>69,580</b>	<b>70,461</b>	<b>881</b>	<b>1%</b>
<b>Building Overhead</b>								
6015 - Janitorial Expense	1,085	1,607	1,344	864	1,422	1,464	43	3%
6020 - Heat	835	1,109	943	1,078	1,223	1,260	37	3%
6025 - Electricity	1,590	2,455	2,179	2,108	2,287	2,356	69	3%
6030 - Water/Sewer	183	404	411	314	315	325	9	3%
6035 - Outside Maintenance	592	711	858	714	938	966	28	3%
6040 - Building Repairs	410	1,249	894	906	1,156	1,191	35	3%
6045 - Bldg Mtncn Contracts	1,402	1,919	2,048	1,498	1,491	1,536	45	3%
6050 - Bldg Mtncn Supplies	243	282	-	-	-	-	-	#DIV/0!
6065 - Bldg Insurance/Fees	599	930	960	1,012	1,053	1,085	32	3%
6070 - Building & Improvements Depre	1,881	2,921	2,834	3,464	4,388	4,388	-	0%
6075 - Furniture & Fixtures Depre	569	733	462	226	223	223	-	0%
7065 - Computers, Equip & Sftwre Depre	6,483	9,386	7,271	4,656	3,299	3,299	-	0%
<b>Total Building Overhead Expenses</b>	<b>15,870</b>	<b>23,707</b>	<b>20,204</b>	<b>16,842</b>	<b>17,796</b>	<b>18,093</b>	<b>297</b>	<b>2%</b>
<b>Total Expenses</b>	<b>481,022</b>	<b>494,776</b>	<b>543,144</b>	<b>516,333</b>	<b>475,677</b>	<b>494,361</b>	<b>18,684</b>	<b>3%</b>
<b>Net Profit (Loss)</b>	<b>\$ (46,402)</b>	<b>\$ (78,556)</b>	<b>\$ (154,419)</b>	<b>\$ (85,623)</b>	<b>\$ 61,443</b>	<b>\$ 53,009</b>	<b>\$ (8,434)</b>	<b>-14%</b>

**Utah State Bar**  
**FY23 Draft Budget**  
**Based on Unaudited Actual Results through 3/31/22**  
**03 - NLTP**

	Actual FY 2018	Actual FY 2019	Actual FY 2020	Actual FY 2021	Projected FY 2022	Draft Budget FY 2023	\$ Change 2022 Projected vs 2023 Budget	% Change 2022 Projected vs 2023 Budget
<b>Revenue</b>								
4020 - NLTP Fees	62,850	65,250	53,850	56,100	64,250	65,535	1,285	2%
4081 - CLE - Registrations	-	-	-	619	-	-	-	#DIV/0!
4200 - Seminar Profit/Loss	(833)	1,099	-	(685)	(876)	(893)	(18)	2%
<b>Total Revenue</b>	<b>62,017</b>	<b>66,349</b>	<b>53,850</b>	<b>56,034</b>	<b>63,374</b>	<b>64,642</b>	<b>1,267</b>	<b>2%</b>
<b>Expenses</b>								
<b>Program Services</b>								
5002 - Meeting facility-internal only	1,680	1,455	970	-	-	1,000	1,000	#DIV/0!
5070 - Equipment Rental	100	-	-	-	-	-	-	#DIV/0!
5075 - Food & Bev-external costs only	1,232	941	83	-	-	50	50	#DIV/0!
5076 - Food & beverage - internal only	3,505	2,908	2,107	-	-	1,350	1,350	#DIV/0!
5085 - Misc. Program Expense	-	85	-	-	-	-	-	#DIV/0!
5702 - Travel - Lodging	2,013	-	-	-	-	2,050	2,050	#DIV/0!
5703 - Travel - Transportation/Parking	1,913	-	-	-	-	-	-	#DIV/0!
5704 - Travel - Mileage Reimbursement	315	-	-	-	-	-	-	#DIV/0!
5705 - Travel - Per Diems	138	-	-	-	-	-	-	#DIV/0!
5706 - Travel - Meals	292	-	-	-	-	-	-	#DIV/0!
5815 - Commission/Education	450	-	-	-	-	-	-	#DIV/0!
<b>Total Program Services Expenses</b>	<b>11,638</b>	<b>5,389</b>	<b>3,159</b>	<b>-</b>	<b>-</b>	<b>6,750</b>	<b>6,750</b>	<b>214%</b>
<b>Salaries &amp; Benefits</b>								
5510 - Salaries/Wages	38,915	30,411	51,871	67,206	40,689	30,144	(10,545)	-26%
5605 - Payroll Taxes	3,280	2,475	4,280	5,291	3,636	2,412	(1,224)	-34%
5610 - Health Insurance	1,840	-	-	-	1,000	3,000	2,000	200%
5620 - Health Ins/Medical Reimb	2	3	0	7	-	-	-	#DIV/0!
5630 - Dental Insurance	112	-	(4)	(20)	-	240	240	#DIV/0!
5640 - Life & LTD Insurance	395	406	411	419	430	200	(230)	-53%
5650 - Retirement Plan Contributions	1,050	2,230	5,074	6,400	4,282	715	(3,567)	-83%
5655 - Retirement Plan Fees & Costs	-	489	614	544	269	269	-	0%
5660 - Training/Development	475	45	470	-	-	-	-	#DIV/0!
<b>Total Salaries/Benefit Expenses</b>	<b>46,070</b>	<b>36,060</b>	<b>62,716</b>	<b>79,848</b>	<b>50,306</b>	<b>36,980</b>	<b>(13,326)</b>	<b>-26%</b>
<b>General &amp; Administrative</b>								
7025 - Office Supplies	63	7	78	3	-	-	-	#DIV/0!
7035 - Postage/Mailing, net	73	9	1	2	1	1	-	0%
7040 - Copy/Printing Expense	91	233	158	68	21	21	-	0%
7050 - Computer Maintenance	941	945	989	3,596	5,778	7,572	1,794	31%
7089 - Membership Database Fees	-	-	-	-	833	10,000	9,167	1100%
7100 - Telephone	1,253	1,422	1,367	1,445	1,402	1,402	-	0%
7105 - Advertising	75	-	-	-	-	-	-	#DIV/0!
7107 - Production Costs	-	-	-	-	-	-	-	#DIV/0!
7110 - Publications/Subscriptions	-	-	-	133	-	-	-	#DIV/0!
7115 - Public Relations	-	-	-	-	-	-	-	#DIV/0!
7120 - Membership/Dues	500	545	515	605	950	950	-	0%
7140 - Credit Card Merchant Fees	1,427	1,485	1,350	1,539	1,614	1,614	-	0%
7175 - O/S Consultants	-	280	11,669	12,860	9,443	-	(9,443)	-100%
<b>Total General &amp; Administrative Expenses</b>	<b>4,423</b>	<b>4,927</b>	<b>16,126</b>	<b>20,252</b>	<b>20,244</b>	<b>21,559</b>	<b>1,315</b>	<b>6%</b>
<b>Building Overhead</b>								
6015 - Janitorial Expense	405	354	293	184	303	312	9	3%
6020 - Heat	284	244	205	230	261	268	8	3%
6025 - Electricity	593	541	475	449	488	502	15	3%
6030 - Water/Sewer	74	89	90	67	67	69	2	3%
6035 - Outside Maintenance	155	157	186	152	200	206	6	3%
6040 - Building Repairs	130	275	194	193	247	254	7	3%
6045 - Bldg Mtncn Contracts	521	423	444	319	318	327	10	3%
6050 - Bldg Mtncn Supplies	66	62	-	-	-	-	-	#DIV/0!
6065 - Bldg Insurance/Fees	221	205	209	216	225	231	7	3%
6070 - Building & Improvements Depre	693	643	616	738	935	935	-	0%
6075 - Furniture & Fixtures Depre	209	161	101	48	48	48	-	0%
7065 - Computers, Equip & Sftwre Depre	2,355	2,067	1,580	993	703	703	-	0%
<b>Total Building Overhead Expenses</b>	<b>5,708</b>	<b>5,220</b>	<b>4,392</b>	<b>3,590</b>	<b>3,793</b>	<b>3,857</b>	<b>63</b>	<b>2%</b>
<b>Total Expenses</b>	<b>67,839</b>	<b>51,595</b>	<b>86,394</b>	<b>103,690</b>	<b>74,344</b>	<b>69,146</b>	<b>(5,198)</b>	<b>-6%</b>
<b>Net Profit (Loss)</b>	<b>\$ (5,822)</b>	<b>\$ 14,754</b>	<b>\$ (32,544)</b>	<b>\$ (47,656)</b>	<b>\$ (10,969)</b>	<b>\$ (4,504)</b>	<b>\$ 6,466</b>	<b>-59%</b>

**Utah State Bar**  
**FY23 Draft Budget**  
**Based on Unaudited Actual Results through 3/31/22**  
**04 - Bar Management**

	Actual FY 2018	Actual FY 2019	Actual FY 2020	Actual FY 2021	Projected FY 2022	Draft Budget FY 2023	\$ Change 2022 Projected vs 2023 Budget	% Change 2022 Projected vs 2023 Budget
<b>Revenue</b>								
4060 - E-Filing Revenue	21,809	48,363	12,432	24,853	16,741	16,741	-	0%
4095 - Miscellaneous Income	829	1,405	1,089	20,956	918	918	-	0%
4103 - In - Kind Revenue - UDR	1,806	2,318	3,305	23	-	-	-	#DIV/0!
4120 - Grant Income	-	-	-	655,810	-	-	-	#DIV/0!
4151 - ILM Realized Gains / Losses	124,366	176,875	139,808	49,282	37,404	37,404	-	0%
4152 - ILM Interest Income	(5,445)	(903)	7,898	7,371	6,283	6,283	-	0%
4153 - ILM Unrealized Gains / Losses	(6,938)	8,528	32,909	(35,781)	(33,743)	(33,743)	-	0%
4155 - General Interest Income	302	1,250	1,371	604	357	357	-	0%
Total Revenue	136,729	237,837	198,811	723,118	27,959	27,959	-	0%
<b>Expenses</b>								
<b>Program Services</b>								
5002 - Meeting facility-internal only	2,080	1,415	855	95	700	428	(273)	-39%
5035 - Awards	-	-	-	11	-	-	-	#DIV/0!
5055 - Legislative Expense	-	110	-	-	-	-	-	#DIV/0!
5061 - LRE - Bar Support	-	-	-	4,182	4,182	4,182	-	0%
5063 - Special Event Expense	1,913	-	-	-	-	-	-	#DIV/0!
5070 - Equipment Rental	-	-	-	-	-	-	-	#DIV/0!
5075 - Food & Bev-external costs only	4,214	2,109	1,270	946	1,270	635	(635)	-50%
5076 - Food & beverage - internal only	759	-	51	-	1,352	26	(1,326)	-98%
5079 - Soft Drinks	3,058	2,723	1,777	1,173	1,473	1,473	-	0%
5085 - Misc. Program Expense	-	491	-	-	-	-	-	#DIV/0!
5702 - Travel - Lodging	945	513	1,624	-	-	812	812	#DIV/0!
5703 - Travel - Transportation/Parking	218	1,432	465	-	112	232	120	107%
5704 - Travel - Mileage Reimbursement	343	113	-	-	-	-	-	#DIV/0!
5705 - Travel - Per Diems	180	38	175	-	-	88	88	#DIV/0!
5706 - Travel - Meals	-	-	-	-	-	-	-	#DIV/0!
5707 - Travel - Commission Mtgs	-	18	-	-	-	-	-	#DIV/0!
5805 - ABA Annual Meeting	7,262	5,343	3,947	-	-	1,973	1,973	#DIV/0!
5810 - ABA Mid Year Meeting	3,246	4,466	5,010	-	-	2,505	2,505	#DIV/0!
5815 - Commission/Education	-	200	-	-	-	-	-	#DIV/0!
5830 - Western States Bar Conference	7,583	11,557	2,918	205	-	1,459	1,459	#DIV/0!
5960 - Overhead Allocation - Seminars	(23,376)	(22,401)	(18,460)	(17,365)	(24,615)	(24,615)	-	0%
Total Program Services Expenses	8,423	8,127	(368)	(10,753)	(15,525)	(10,802)	4,723	-1283%
<b>Salaries &amp; Benefits</b>								
5510 - Salaries/Wages	527,038	529,301	600,606	554,818	437,009	458,859	21,850	5%
5605 - Payroll Taxes	37,016	37,744	40,797	42,203	42,304	44,419	2,115	5%
5610 - Health Insurance	41,483	45,849	46,425	47,293	41,391	43,461	2,070	5%
5620 - Health Ins/Medical Reimb	1,597	420	294	-	1	1	-	0%
5630 - Dental Insurance	1,787	2,278	2,099	2,046	1,317	1,383	66	5%
5640 - Life & LTD Insurance	3,010	3,464	3,282	4,050	2,937	3,084	147	5%
5645 - Workman's Comp Insurance	2,544	2,487	2,832	2,733	2,961	2,961	-	0%
5650 - Retirement Plan Contributions	53,550	49,861	49,383	55,902	54,590	58,620	4,030	7%
5655 - Retirement Plan Fees & Costs	3,549	2,989	2,611	2,306	2,080	2,080	-	0%
5660 - Training/Development	2,416	4,993	1,433	165	1,554	1,632	78	5%
66000 - Payroll Expenses	0	(0)	0	0	0	0	-	0%
Total Salaries/Benefit Expenses	673,990	679,385	749,762	711,516	586,143	616,498	30,355	5%
<b>General &amp; Administrative</b>								
7025 - Office Supplies	7,499	9,352	7,879	8,981	7,322	7,322	-	0%
7035 - Postage/Mailing, net	1,105	1,012	1,854	3,782	1,370	1,370	-	0%
7040 - Copy/Printing Expense	2,929	2,797	3,266	7,676	2,777	2,777	-	0%
7041 - Copy/Print revenue	-	-	-	78	-	-	-	#DIV/0!
7045 - Internet Service	60	-	-	-	-	-	-	#DIV/0!
7050 - Computer Maintenance	4,707	4,727	5,117	4,942	6,982	14,807	7,825	112%
7055 - Computer Supplies & Small Equip	291	1,275	1,304	5,680	4,874	5,117	244	5%
7089 - Membership Database Fees	1,151	-	-	8,310	-	-	-	#DIV/0!
7095 - Fax Equip & Supplies	(67)	-	-	-	(140)	(140)	-	0%
7100 - Telephone	5,274	7,257	7,948	8,750	7,175	7,175	-	0%
7105 - Advertising	-	460	75	499	-	-	-	#DIV/0!
7110 - Publications/Subscriptions	2,510	2,988	5,203	6,189	8,185	8,185	-	0%
7120 - Membership/Dues	3,794	1,528	2,265	2,038	4,812	4,812	-	0%
7135 - Bank Service Charges	1,178	1,111	846	928	808	808	-	0%
7136 - ILM Service Charges	16,892	17,698	18,048	17,944	20,541	20,541	-	0%
7140 - Credit Card Merchant Fees	(1,642)	(897)	1,014	(2,412)	3,068	3,068	-	0%
7141 - Credit Card surcharge	-	-	-	-	(144)	(144)	-	0%
7150 - E&O/Off & Dir Insurance	9,184	9,386	9,429	10,021	11,066	11,066	-	0%
7160 - Audit Expense	31,363	33,546	34,265	35,435	38,143	38,143	-	0%
7175 - O/S Consultants	11,195	9,310	15,774	23,241	16,406	4,300	(12,106)	-74%
7179 - Payroll Adm Fees	2,826	2,885	3,169	3,126	2,973	2,973	-	0%
7180 - Administrative Fee Expense	1,176	773	1,118	996	1,580	1,580	-	0%
7190 - Lease Interest Expense	701	770	573	364	364	364	-	0%
7195 - Other Gen & Adm Expense	2,016	9,601	8,047	9,651	10,532	10,532	-	0%
Total General & Administrative Expenses	104,141	115,943	127,192	156,218	148,693	144,656	(4,037)	-3%
<b>In Kind Expenses</b>								
7103 - InKind Contrib-UDR & all other	3,689	4,209	5,282	5,404	1,836	1,836	-	0%
<b>Building Overhead</b>								
6015 - Janitorial Expense	2,024	2,410	2,057	1,388	2,284	2,353	69	3%
6020 - Heat	1,493	1,663	1,454	1,732	1,965	2,024	59	3%
6025 - Electricity	2,964	3,683	3,340	3,387	3,674	3,785	110	3%
6030 - Water/Sewer	355	606	628	505	507	522	15	3%
6035 - Outside Maintenance	945	1,067	1,340	1,146	1,507	1,552	45	3%
6040 - Building Repairs	710	1,874	1,381	1,456	1,858	1,914	56	3%
6045 - Bldg Mtncn Contracts	2,610	2,879	3,170	2,407	2,396	2,468	72	3%

**Utah State Bar**  
**FY23 Draft Budget**  
**Based on Unaudited Actual Results through 3/31/22**  
**04 - Bar Management**

	Actual FY 2018	Actual FY 2019	Actual FY 2020	Actual FY 2021	Projected FY 2022	Draft Budget FY 2023	\$ Change 2022 Projected vs 2023 Budget	% Change 2022 Projected vs 2023 Budget
6050 - Bldg Mtnc Supplies	395	424	-	-	-	-	-	#DIV/0!
6065 - Bldg Insurance/Fees	1,111	1,395	1,481	1,627	1,692	1,743	51	3%
6070 - Building & Improvements Depr	3,488	4,381	4,372	5,565	7,049	7,049	-	0%
6075 - Furniture & Fixtures Depr	1,053	1,099	713	363	358	358	-	0%
7065 - Computers, Equip & Sftwre Depr	11,939	14,080	11,223	7,481	5,300	5,300	-	0%
Total Building Overhead Expenses	29,087	35,561	31,158	27,058	28,591	29,067	476	2%
Total Expenses	819,329	843,224	913,027	889,442	749,738	781,255	31,517	3%
Other Income/Expense								
4300 - Gain (Loss) - Sales of Assets	-	-	(5,673)	-	-	-	(31,517)	#DIV/0!
Net Profit (Loss)	\$ (682,600)	\$ (605,388)	\$ (708,543)	\$ (166,325)	\$ (721,779)	\$ (753,296)	\$ (31,517)	4%

Bar Management is included in the Bar Operations department shown on pages 4-6 and 10.



**Utah State Bar**  
**FY23 Draft Budget**  
**Based on Unaudited Actual Results through 3/31/22**  
**05 - Property Management**

	Actual FY 2018	Actual FY 2019	Actual FY 2020	Actual FY 2021	Projected FY 2022	Draft Budget FY 2023	\$ Change 2022 Projected vs 2023 Budget	% Change 2022 Projected vs 2023 Budget
<b>Revenue</b>								
4039 - Room Rental-All parties	109,925	102,773	72,158	12,344	31,476	51,387	19,911	63%
4042 - Food & Beverage Rev-All Parties	115,796	125,308	79,334	5,539	17,329	62,654	45,325	262%
4043 - Setup & A/V charges-All parties	1,044	1,402	1,145	-	945	701	(244)	-26%
4090 - Tenant Rent	21,672	21,086	22,258	21,232	19,252	19,252	-	0%
4095 - Miscellaneous Income	105	70	16	70	-	-	-	#DIV/0!
<b>Total Revenue</b>	<b>248,542</b>	<b>250,639</b>	<b>174,911</b>	<b>39,185</b>	<b>69,001</b>	<b>133,993</b>	<b>64,992</b>	<b>94%</b>
<b>Expenses</b>								
<b>Program Services</b>								
5002 - Meeting facility-internal only	-	95	205	-	-	-	-	#DIV/0!
5035 - Awards	100	-	-	-	-	-	-	#DIV/0!
5070 - Equipment Rental	844	1,157	1,145	-	945	578	(366)	-39%
5075 - Food & Bev-external costs only	103,858	111,946	71,290	2,965	14,014	55,973	41,958	299%
5076 - Food & beverage - internal only	-	-	274	1,987	1,906	-	(1,906)	-100%
5079 - Soft Drinks	6,907	7,911	4,881	1,335	2,219	3,956	1,737	78%
<b>Total Program Services Expenses</b>	<b>112,590</b>	<b>121,765</b>	<b>77,796</b>	<b>6,287</b>	<b>19,084</b>	<b>60,507</b>	<b>41,423</b>	<b>53%</b>
<b>Salaries &amp; Benefits</b>								
5510 - Salaries/Wages	109,616	111,339	127,775	123,169	109,515	134,991	25,476	23%
5605 - Payroll Taxes	8,827	8,661	10,021	9,905	9,066	11,219	2,153	24%
5610 - Health Insurance	15,978	16,401	18,230	16,829	17,192	18,052	860	5%
5620 - Health Ins/Medical Reimb	555	1,120	516	1,161	1,156	1,156	-	0%
5630 - Dental Insurance	858	866	830	873	908	953	45	5%
5640 - Life & LTD Insurance	701	696	705	721	725	761	36	5%
5645 - Workman's Comp Insurance	-	-	-	-	-	-	-	#DIV/0!
5650 - Retirement Plan Contributions	10,156	10,027	11,541	11,776	10,801	11,341	540	5%
5655 - Retirement Plan Fees & Costs	1,420	1,326	1,228	1,088	804	804	-	0%
5660 - Training/Development	600	90	90	-	-	-	-	#DIV/0!
<b>Total Salaries/Benefit Expenses</b>	<b>148,711</b>	<b>150,527</b>	<b>170,935</b>	<b>165,522</b>	<b>150,166</b>	<b>179,276</b>	<b>29,110</b>	<b>19%</b>
<b>General &amp; Administrative</b>								
7025 - Office Supplies	866	1,436	2,282	405	1,270	1,270	-	0%
7033 - Operating Meeting Supplies	21,998	22,789	17,400	1,822	2,615	8,700	6,085	233%
7035 - Postage/Mailing, net	2,060	(348)	(993)	11,493	(3,149)	(3,149)	-	0%
7040 - Copy/Printing Expense	3,650	3,697	5,138	453	-	2,569	2,569	#DIV/0!
7041 - Copy/Print revenue	(26,262)	(25,255)	(19,602)	(17,345)	(18,595)	(18,595)	-	0%
7045 - Internet Service	-	-	-	-	-	-	-	#DIV/0!
7050 - Computer Maintenance	-	-	-	-	1,049	4,923	3,874	369%
7055 - Computer Supplies & Small Equip	471	603	2,535	-	219	230	11	5%
7100 - Telephone	5,259	4,478	4,531	5,188	4,560	4,560	-	0%
7105 - Advertising	-	75	-	-	-	-	-	#DIV/0!
7110 - Publications/Subscriptions	-	-	-	-	125	125	-	0%
7140 - Credit Card Merchant Fees	19	118	20	-	35	35	-	0%
7175 - O/S Consultants	-	561	3,839	4,220	3,553	-	(3,553)	-100%
7190 - Lease Interest Expense	-	-	-	-	-	-	-	#DIV/0!
7191 - Lease Sales Tax Expense	88	-	-	-	-	-	-	#DIV/0!
7195 - Other Gen & Adm Expense	-	-	1,611	125	165	165	-	0%
<b>Total General &amp; Administrative Expenses</b>	<b>8,150</b>	<b>8,153</b>	<b>16,761</b>	<b>6,362</b>	<b>(8,152)</b>	<b>833</b>	<b>8,985</b>	<b>-110%</b>
<b>In Kind Expenses</b>								
7103 - InKind Contrib-UDR & all other	16,828	15,795	12,555	475	12,927	12,927	-	0%
<b>Building Overhead</b>								
6015 - Janitorial Expense	15,342	15,282	13,013	8,724	12,231	12,598	367	3%
6020 - Heat	11,007	10,548	9,188	10,891	9,817	10,111	295	3%
6025 - Electricity	22,462	23,351	21,121	21,294	20,710	21,331	621	3%
6030 - Water/Sewer	2,758	3,839	3,970	3,175	2,933	3,021	88	3%
6035 - Outside Maintenance	6,363	6,767	8,453	7,207	7,742	7,974	232	3%
6040 - Building Repairs	5,103	11,883	8,723	12,212	14,011	14,431	420	3%
6045 - Bldg Mtncn Contracts	19,750	18,255	20,019	15,130	12,886	13,273	387	3%
6050 - Bldg Mtncn Supplies	2,694	2,686	-	-	-	-	-	#DIV/0!
6055 - Real Property Taxes	14,883	12,069	12,378	13,709	13,621	14,030	409	3%
6060 - Personal Property Taxes	196	176	167	159	150	155	5	3%
6065 - Bldg Insurance/Fees	8,391	8,849	9,358	10,226	10,637	10,957	319	3%
6070 - Building & Improvements Depre	26,327	27,782	27,622	34,988	38,300	38,300	-	0%
6075 - Furniture & Fixtures Depre	7,944	6,970	4,504	2,285	2,052	2,052	-	0%
7065 - Computers, Equip & Sftwre Depre	89,696	89,278	70,906	47,032	29,025	29,025	-	0%
<b>Total Building Overhead Expenses</b>	<b>232,915</b>	<b>237,734</b>	<b>209,422</b>	<b>187,030</b>	<b>174,114</b>	<b>177,256</b>	<b>3,142</b>	<b>2%</b>
<b>Total Expenses</b>	<b>519,194</b>	<b>533,973</b>	<b>487,468</b>	<b>365,677</b>	<b>348,138</b>	<b>430,800</b>	<b>82,661</b>	<b>17%</b>
<b>Net Profit (Loss)</b>	<b>\$ (270,652)</b>	<b>\$ (283,334)</b>	<b>\$ (312,557)</b>	<b>\$ (326,492)</b>	<b>\$ (279,137)</b>	<b>\$ (296,806)</b>	<b>\$ (17,669)</b>	<b>6%</b>

**Utah State Bar**  
**FY23 Draft Budget**  
**Based on Unaudited Actual Results through 3/31/22**  
**06 - Office of Prof Conduct**

	Actual FY 2018	Actual FY 2019	Actual FY 2020	Actual FY 2021	Projected FY 2022	Draft Budget FY 2023	\$ Change 2022 Projected vs 2023 Budget	% Change 2022 Projected vs 2023 Budget
<b>Revenue</b>								
4095 - Miscellaneous Income	5,059	6,269	4,100	2,203	3,269	4,000	731	22%
4200 - Seminar Profit/Loss	16,229	27,065	9,546	61,452	57,613	57,613	-	0%
Total Revenue	21,288	33,333	13,646	63,656	60,882	61,613	731	1%
<b>Expenses</b>								
<b>Program Services</b>								
5002 - Meeting facility-internal only	460	-	95	270	1,270	1,270	-	0%
5015 - Investigations	-	118	425	430	675	700	25	4%
5025 - Temp Labor/Proctors	-	-	350	-	90	90	-	0%
5040 - Witness & Hearing Expense	1,733	2,011	2,038	254	764	764	-	0%
5041 - Process Serving	656	1,211	1,049	282	607	607	-	0%
5046 - Court Reporting	152	-	-	33	15	15	-	0%
5075 - Food & Bev-external costs only	-	659	331	-	-	-	-	#DIV/0!
5076 - Food & beverage - internal only	191	-	-	-	136	136	-	0%
5079 - Soft Drinks	-	86	336	183	239	239	-	0%
5085 - Misc. Program Expense	420	-	-	-	-	-	-	#DIV/0!
5702 - Travel - Lodging	3,911	7,257	6,528	-	-	5,000	5,000	#DIV/0!
5703 - Travel - Transportation/Parking	1,768	3,338	4,646	2	728	2,000	1,272	175%
5704 - Travel - Mileage Reimbursement	1,309	2,936	332	-	-	200	200	#DIV/0!
5705 - Travel - Per Diems	684	1,723	1,835	-	-	1,250	1,250	#DIV/0!
Total Program Services Expenses	24,347	27,053	24,596	1,453	4,524	12,271	7,747	31%
<b>Salaries &amp; Benefits</b>								
5510 - Salaries/Wages	881,043	945,401	976,762	985,214	991,216	1,040,776	49,561	5%
5605 - Payroll Taxes	64,622	70,258	74,673	74,517	77,389	81,258	3,869	5%
5610 - Health Insurance	78,987	79,613	84,969	93,308	91,066	95,619	4,553	5%
5620 - Health Ins/Medical Reimb	941	1,195	2,152	4,798	3,949	3,949	-	0%
5630 - Dental Insurance	5,682	6,177	6,171	6,399	6,275	6,588	314	5%
5640 - Life & LTD Insurance	5,624	5,768	5,805	6,114	6,194	6,503	310	5%
5650 - Retirement Plan Contributions	78,849	86,153	95,528	88,553	92,668	97,302	4,633	5%
5655 - Retirement Plan Fees & Costs	6,558	6,775	7,060	5,702	4,547	4,547	-	0%
5660 - Training/Development	6,385	5,480	8,845	1,776	1,200	1,200	-	0%
Total Salaries/Benefit Expenses	1,128,691	1,206,819	1,261,964	1,266,380	1,274,503	1,337,743	63,240	5%
<b>General &amp; Administrative</b>								
7025 - Office Supplies	5,135	6,738	5,659	3,663	3,868	4,500	632	16%
7035 - Postage/Mailing, net	5,630	4,994	4,044	4,399	5,793	5,793	-	0%
7040 - Copy/Printing Expense	14,665	17,855	14,767	11,857	14,331	14,331	-	0%
7045 - Internet Service	-	104	466	-	833	833	-	0%
7050 - Computer Maintenance	2,824	3,711	5,153	2,966	11,967	30,701	18,734	157%
7055 - Computer Supplies & Small Equip	589	2,482	2,208	1,535	1,640	1,722	82	5%
7089 - Membership Database Fees	8,087	11,133	11,793	4,127	8,000	8,000	-	0%
7100 - Telephone	12,937	14,441	15,164	17,345	16,819	16,819	-	0%
7105 - Advertising	360	-	225	-	230	230	-	0%
7106 - Public Notification	608	1,149	465	290	-	-	-	#DIV/0!
7110 - Publications/Subscriptions	10,328	12,079	13,037	14,075	10,674	12,000	1,326	12%
7120 - Membership/Dues	4,810	4,745	4,460	4,095	5,580	5,680	100	2%
7140 - Credit Card Merchant Fees	982	-	-	-	-	-	-	#DIV/0!
7150 - E&O/Off & Dir Insurance	14,253	14,327	14,478	14,774	15,605	15,605	-	0%
7175 - O/S Consultants	-	3,366	31,173	25,321	20,652	-	(20,652)	-100%
7176 - Bar Litigation	-	-	7,000	-	-	-	-	#DIV/0!
7178 - Offsite Storage/Backup	4,228	11,616	3,889	-	-	-	-	#DIV/0!
7195 - Other Gen & Adm Expense	-	446	354	768	1,200	1,200	-	0%
Total General & Administrative Expenses	85,437	109,184	134,334	105,217	117,192	117,414	222	0%
<b>Building Overhead</b>								
6015 - Janitorial Expense	6,037	5,608	4,776	3,202	5,270	5,428	158	3%
6020 - Heat	4,275	3,871	3,372	3,997	4,533	4,669	136	3%
6025 - Electricity	8,838	8,570	7,751	7,815	8,478	8,732	254	3%
6030 - Water/Sewer	1,095	1,409	1,457	1,165	1,169	1,204	35	3%
6035 - Outside Maintenance	2,395	2,484	3,102	2,645	3,478	3,582	104	3%
6040 - Building Repairs	1,970	4,361	3,201	3,359	4,287	4,415	129	3%
6045 - Bldg Mtncn Contracts	7,767	6,700	7,347	5,553	5,528	5,693	166	3%
6050 - Bldg Mtncn Supplies	1,019	986	-	-	-	-	-	#DIV/0!
6065 - Bldg Insurance/Fees	3,298	3,247	3,434	3,753	3,904	4,021	117	3%
6070 - Building & Improvements Depre	10,344	10,196	10,137	12,841	16,265	16,265	-	0%
6075 - Furniture & Fixtures Depre	3,121	2,558	1,653	839	827	827	-	0%
7065 - Computers, Equip & Sftwre Depr	35,185	32,765	26,023	17,261	12,229	12,229	-	0%
Total Building Overhead Expenses	85,342	82,755	72,254	62,428	65,965	67,065	1,099	2%
<b>Total Expenses</b>	<b>1,323,817</b>	<b>1,425,811</b>	<b>1,493,149</b>	<b>1,435,479</b>	<b>1,462,184</b>	<b>1,534,494</b>	<b>72,309</b>	<b>5%</b>

**Utah State Bar**  
**FY23 Draft Budget**  
**Based on Unaudited Actual Results through 3/31/22**  
**06 - Office of Prof Conduct**

	Actual FY 2018	Actual FY 2019	Actual FY 2020	Actual FY 2021	Projected FY 2022	Draft Budget FY 2023	\$ Change 2022 Projected vs 2023 Budget	% Change 2022 Projected vs 2023 Budget
Net Profit (Loss)	\$ (1,302,529)	\$ (1,392,478)	\$ (1,479,502)	\$ (1,371,823)	\$ (1,401,303)	\$ (1,472,881)	\$ (71,578)	5%

**NOTES TO OPC BUDGET:**

1 Aside from regular required services, the

Account	Amount	Vendor	Purpose
7050 - Computer Maintenance \$500/month	ClearLink	Adlumin Service - Daily log management and daily external vulnerability scanning	
7050 - Computer Maintenance \$300/month	VLCM	Attivo Networks - Active directory monitoring and application monitoring	
7050 - Computer Maintenance \$250/month	Euclid	Annual maintenance	
		Clearview package - virus protection, qtrly internal vulnerability scans, routine updates, server, workstation & network maintenance, and Security Operations Center (SOC) Support	
7050 - Computer Maintenance \$1,650/month	ClearLink	Office 365 Windows subscription & back up services	
7100 - Telephone \$580/month	ClearLink	Phone extensions, phones and voicemail	
7100 - Telephone \$530/month	Mitel	Internet provider	
7100 - Telephone \$90/month	Google Fiber	Backup internet and alarm phone system	
7100 - Telephone \$60/month	Comcast	JustWare/case management replacement	
7089 - Membership Database \$8,000/year	Unknown		

NOTE: The annual total cost of the items listed above is approximately \$55,520, which have been included in the FY 22/23 budget for accounts listed above.

2 In addition to the contractual amounts with ClearLink listed above, ancillary IT support provided by Euclid is charged at \$175/hour. It is anticipated and budgeted that OPC will incur approximately 10 hours during FY 22/23.

3 No major software upgrades are expected for the FY 22/23 for OPC.

4 No major computer/hardware purchases are expected for FY22/23 for OPC.

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

6 Any disciplinary-related expenses billed to General Counsel remain as a General Counsel or Ethics and Discipline Committee expense and are not charged to OPC; this includes salaries for Bar staff and the Ethics and Discipline Committee Chair.

**Utah State Bar**  
**FY23 Draft Budget**  
**Based on Unaudited Actual Results through 3/31/22**  
**07 - General Counsel:Ethics & Discipline Committee**

	Actual FY 2018	Actual FY 2019	Actual FY 2020	Actual FY 2021	Projected FY 2022	Draft Budget FY 2023	\$ Change 2022 Projected vs 2023 Budget	% Change 2022 Projected vs 2023 Budget
<b>Expenses</b>								
<b>Program Services</b>								
5002 • Meeting facility-internal only	-	-	-	-	420	4,000	3,580	852%
5015 • Investigations	-	-	-	88	75	75	-	0%
5075 • Food & Bev-external costs only	-	-	-	-	69	69	-	0%
5076 • Food & beverage - internal only	-	-	-	-	4	2,500	2,496	62400%
5702 • Travel - Lodging	-	-	-	-	-	-	-	#DIV/0!
5703 • Transportation	-	-	-	-	402	-	(402)	-100%
5703 • Travel - Transportation/Parking	-	-	-	-	-	100	100	#DIV/0!
5704 • Travel - Mileage Reimbursement	-	-	-	-	88	971	5,774	#DIV/0!
<b>Total Program Services Expenses</b>	-	-	-	-	-	-	-	-
<b>Salaries &amp; Benefits</b>								
5510 • Salaries/Wages	-	-	-	37,624	157,313	170,178	12,866	8%
5605 • Payroll Taxes	-	-	-	3,273	13,446	14,119	672	5%
5610 • Health Insurance	-	-	-	-	8,718	9,154	436	5%
5620 • Health Ins/Medical Reimb	-	-	-	2	2	2	0	5%
5630 • Dental Insurance	-	-	-	-	428	450	21	5%
5640 • Life & LTD Insurance	-	-	-	-	315	331	16	5%
5650 • Retirement Plan Contributions	-	-	-	2,058	2,379	15,998	13,619	573%
5660 • Training/Development	-	-	-	100	275	289	14	5%
<b>Total Salaries/Benefit Expenses</b>	-	-	-	-	-	-	-	-
<b>General &amp; Administrative</b>								
7025 • Office Supplies	-	-	-	4	36	150	114	315%
7035 • Postage/Mailing, net	-	-	-	53	442	442	-	0%
7040 • Copy/Printing Expense	-	-	-	169	1,396	2,000	604	43%
7045 • Internet Service	-	-	-	180	347	347	-	0%
7050 • Computer Maintenance	-	-	-	-	540	1,985	1,445	268%
7055 • Computer Supplies & Small Equip	-	-	-	40	467	467	-	0%
7089 • Membership Database Fees	-	-	-	-	-	10,000	10,000	#DIV/0!
7100 • Telephone	-	-	-	-	753	753	-	0%
7110 • Publications/Subscriptions	-	-	-	327	498	498	-	0%
7120 • Membership/Dues	-	-	-	250	900	900	-	0%
7150 • E&O/Off & Dir Insurance	-	-	-	-	960	960	-	0%
7177 • UPL	-	-	-	1,564	-	-	-	#DIV/0!
7195 • Other Gen & Adm Expense	-	-	-	575	575	-	(575)	-100%
<b>Total General &amp; Administrative Expenses</b>	-	-	-	-	-	-	-	-
<b>In Kind Expenses</b>								
7103 • InKind Contrib-UDR & all other	-	-	-	-	-	-	-	#DIV/0!
<b>Building Overhead</b>								
6015 • Janitorial Expense	-	-	-	-	155	160	5	3%
6020 • Heat	-	-	-	-	194	200	6	3%
6025 • Electricity	-	-	-	-	379	391	11	3%
6030 • Water/Sewer	-	-	-	-	57	58	2	3%
6035 • Outside Maintenance	-	-	-	-	128	131	4	3%
6040 • Building Repairs	-	-	-	-	163	168	5	3%
6045 • Bldg Mtncn Contracts	-	-	-	-	447	461	13	3%
6065 • Bldg Insurance/Fees	-	-	-	-	590	608	18	3%
6075 • Furniture & Fixtures Depr	-	-	-	-	28	28	-	0%
7065 • Computers, Equip & Sftwre Depr	-	-	-	-	870	870	-	0%
<b>Total Building Overhead Expenses</b>	-	-	-	-	-	-	-	-
<b>Total Expenses</b>	-	-	-	-	-	-	-	-
<b>Net Profit (Loss)</b>	\$ -	\$ -	\$ -	\$ (46,305)	\$ (193,773)	\$ (238,841)	\$ (45,068)	23%

Ethics & Discipline is included in the Bar Operations department shown on pages 6-8 and 12.



**Utah State Bar**  
**FY23 Draft Budget**  
**Based on Unaudited Actual Results through 3/31/22**  
**07 - General Counsel**

	Actual FY 2018	Actual FY 2019	Actual FY 2020	Actual FY 2021	Projected FY 2022	Draft Budget FY 2023	\$ Change 2022 Projected vs 2023 Budget	% Change 2022 Projected vs 2023 Budget
<b>Expenses</b>								
<b>Program Services</b>								
5002 - Meeting facility-internal only	5,420	4,155	3,475	2,205	2,735	2,735	-	0%
5015 - Investigations	110	47	48	-	-	-	-	#DIV/0!
5040 - Witness & Hearing Expense	(1,095)	(405)	(540)	(270)	(375)	(375)	-	0%
5075 - Food & Bev-external costs only	-	-	-	39	69	69	-	0%
5076 - Food & beverage - internal only	2,760	2,557	2,016	13	178	1,008	830	466%
5702 - Travel - Lodging	2,626	-	-	-	-	-	-	#DIV/0!
5703 - Travel - Transportation/Parking	1,759	1,049	231	-	-	116	116	#DIV/0!
5704 - Travel - Mileage Reimbursement	357	332	354	-	-	177	177	#DIV/0!
5705 - Travel - Per Diems	138	-	-	-	-	-	-	#DIV/0!
5707 - Travel - Commission Mtgs	163	-	-	-	-	-	-	#DIV/0!
5805 - ABA Annual Meeting	3,335	-	-	-	-	-	-	#DIV/0!
5810 - ABA Mid Year Meeting	-	-	2,067	-	-	-	-	#DIV/0!
<b>Total Program Services Expenses</b>	<b>15,649</b>	<b>7,736</b>	<b>7,651</b>	<b>1,987</b>	<b>2,607</b>	<b>3,730</b>	<b>1,123</b>	<b>15%</b>
<b>Salaries &amp; Benefits</b>								
5510 - Salaries/Wages	185,715	185,582	211,176	198,825	201,793	281,883	80,090	40%
5605 - Payroll Taxes	13,120	14,020	15,756	14,496	14,184	21,193	7,009	49%
5610 - Health Insurance	12,456	14,219	15,475	19,005	15,191	21,951	6,760	44%
5620 - Health Ins/Medical Reimb	3	6	5	1	3	3	-	0%
5630 - Dental Insurance	429	433	413	500	1,226	1,767	541	44%
5640 - Life & LTD Insurance	1,099	1,094	1,103	1,262	2,407	3,367	960	40%
5645 - Workman's Comp Insurance	-	-	-	-	-	-	-	#DIV/0!
5650 - Retirement Plan Contributions	18,072	19,149	19,965	18,638	8,093	15,848	7,755	96%
5655 - Retirement Plan Fees & Costs	1,420	1,326	1,228	1,088	804	804	-	0%
5660 - Training/Development	800	1,660	325	179	204	204	-	0%
66000 - Payroll Expenses	-	-	-	-	-	-	-	#DIV/0!
<b>Total Salaries/Benefit Expenses</b>	<b>233,114</b>	<b>237,490</b>	<b>265,447</b>	<b>253,995</b>	<b>243,905</b>	<b>347,019</b>	<b>103,115</b>	<b>42%</b>
<b>General &amp; Administrative</b>								
7025 - Office Supplies	304	153	460	90	366	366	-	0%
7035 - Postage/Mailing, net	487	338	361	125	32	32	-	0%
7040 - Copy/Printing Expense	1,338	2,493	1,919	525	248	748	500	201%
7045 - Internet Service	-	398	148	-	-	-	-	#DIV/0!
7050 - Computer Maintenance	1,883	3,991	3,920	1,977	3,580	10,194	6,614	185%
7055 - Computer Supplies & Small Equip	2,660	1,309	514	-	376	394	19	5%
7089 - Membership Database Fees	-	195	-	-	2,817	2,817	-	0%
7100 - Telephone	2,233	2,526	2,625	3,180	2,790	2,790	-	0%
7110 - Publications/Subscriptions	1,892	1,919	1,910	1,099	482	482	-	0%
7120 - Membership/Dues	820	845	1,030	740	781	781	-	0%
7150 - E&O/Off & Dir Insurance	4,072	4,094	4,137	4,221	3,499	3,499	-	0%
7175 - O/S Consultants	-	1,091	3,991	4,334	4,979	-	(4,979)	-100%
7176 - Bar Litigation	22,356	6,374	15,245	10,450	26,580	10,000	(16,580)	-62%
7177 - UPL	1,139	8,302	41,141	-	-	20,000	20,000	#DIV/0!
7195 - Other Gen & Adm Expense	-	-	-	124	424	-	(424)	-100%
<b>Total General &amp; Administrative Expenses</b>	<b>39,184</b>	<b>34,028</b>	<b>77,399</b>	<b>26,865</b>	<b>46,952</b>	<b>52,103</b>	<b>5,151</b>	<b>11%</b>
<b>Building Overhead</b>								
6015 - Janitorial Expense	1,065	844	719	483	769	792	23	3%
6020 - Heat	738	582	508	603	644	663	19	3%
6025 - Electricity	1,559	1,289	1,167	1,179	1,044	1,076	31	3%
6030 - Water/Sewer	197	212	219	176	135	139	4	3%
6035 - Outside Maintenance	383	374	467	399	502	517	15	3%
6040 - Building Repairs	334	656	482	507	528	544	16	3%
6045 - Bldg Mtncn Contracts	1,369	1,008	1,107	837	519	534	16	3%
6065 - Bldg Insurance/Fees	580	489	517	566	(2)	(2)	(0)	3%
6070 - Building & Improvements Depr	1,820	1,534	1,527	1,937	2,819	2,819	-	0%
6075 - Furniture & Fixtures Depr	549	385	249	126	109	109	-	0%
7065 - Computers, Equip & Sftwre Depr	6,170	4,930	3,919	2,603	1,236	1,236	-	0%
<b>Total Building Overhead Expenses</b>	<b>14,929</b>	<b>12,451</b>	<b>10,882</b>	<b>9,416</b>	<b>8,303</b>	<b>8,427</b>	<b>124</b>	<b>1%</b>
<b>Total Expenses</b>	<b>302,876</b>	<b>291,705</b>	<b>361,379</b>	<b>292,262</b>	<b>301,767</b>	<b>411,279</b>	<b>109,512</b>	<b>30%</b>
<b>Net Profit (Loss)</b>	<b>\$ (302,876)</b>	<b>\$ (291,705)</b>	<b>\$ (361,379)</b>	<b>\$ (292,262)</b>	<b>\$ (301,767)</b>	<b>\$ (411,279)</b>	<b>\$ (109,512)</b>	<b>36%</b>

General Counsel is included in the Bar Operations department shown on pages 6-8 and 12.

**Utah State Bar**  
**FY23 Draft Budget**  
**Based on Unaudited Actual Results through 3/31/22**  
**08 - Computer/MIS/Internet**

	Actual FY 2018	Actual FY 2019	Actual FY 2020	Actual FY 2021	Projected FY 2022	Draft Budget FY 2023	\$ Change 2022 Projected vs 2023 Budget	% Change 2022 Projected vs 2023 Budget
<b>Expenses</b>								
Program Services								
5025 - Temp Labor/Proctors	-	1,025	140	-	-	-	-	#DIV/0!
5070 - Equipment Rental	-	-	-	38	38	38	-	0%
5075 - Food & Bev-external costs only	-	889	69	-	-	-	-	#DIV/0!
5095 - Wills for Heroes	-	519	-	-	531	-	(531)	-100%
5702 - Travel - Lodging	432	2,379	5,789	-	-	2,894	2,894	#DIV/0!
5703 - Travel - Transportation/Parking	1,517	1,411	1,930	-	10	965	955	9453%
5704 - Travel - Mileage Reimbursement	-	308	826	-	-	413	413	#DIV/0!
5705 - Travel - Per Diems	-	652	1,019	-	-	510	510	#DIV/0!
5706 - Travel - Meals	-	37	-	-	-	-	-	#DIV/0!
5707 - Travel - Commission Mtgs	-	18	-	-	-	-	-	#DIV/0!
Total Program Services Expenses	1,949	7,237	9,772	38	579	4,819	4,241	43%
Salaries & Benefits								
5510 - Salaries/Wages	120,436	157,550	192,642	193,901	211,244	221,806	10,562	5%
5605 - Payroll Taxes	9,744	11,841	13,335	13,603	15,708	17,244	1,535	10%
5610 - Health Insurance	11,835	19,014	22,356	21,480	20,932	21,979	1,047	5%
5630 - Dental Insurance	787	691	615	690	908	953	45	5%
5640 - Life & LTD Insurance	874	1,007	1,165	1,181	1,207	1,268	60	5%
5650 - Retirement Plan Contributions	12,925	1,721	14,987	18,527	20,612	22,143	1,531	7%
5655 - Retirement Plan Fees & Costs	1,420	174	1,071	1,088	804	804	-	0%
Total Salaries/Benefit Expenses	159,765	197,493	250,795	251,628	272,014	286,795	14,781	5%
General & Administrative								
7025 - Office Supplies	1,646	1,685	1,326	307	465	465	-	0%
7040 - Copy/Printing Expense	-	32	3,003	1,919	825	825	-	0%
7041 - Copy/Print revenue	-	-	-	224	-	-	-	#DIV/0!
7045 - Internet Service	14,360	6,241	2,754	3,479	2,858	2,858	-	0%
7050 - Computer Maintenance	1,883	12,726	10,395	7,986	11,606	22,847	-	0%
7055 - Computer Supplies & Small Equip	1,605	4,301	6,872	4,199	9,933	9,933	-	0%
7089 - Membership Database Fees	12,751	1,160	-	-	-	-	-	#DIV/0!
7100 - Telephone	2,662	5,442	5,948	7,973	8,026	8,026	-	0%
7105 - Advertising	538	-	-	-	-	-	-	#DIV/0!
7110 - Publications/Subscriptions	1,856	2,262	985	1,661	1,246	1,246	-	0%
7120 - Membership/Dues	231	569	566	-	-	-	-	#DIV/0!
7175 - O/S Consultants	94,192	56,036	14,598	13,249	28,411	-	(28,411)	-100%
7195 - Other Gen & Adm Expense	577	240	444	274	205	205	-	0%
Total General & Administrative Expenses	132,300	90,693	46,889	41,271	63,574	46,404	(28,411)	-45%
Building Overhead								
6015 - Janitorial Expense	696	860	717	455	750	772	22	3%
6020 - Heat	517	594	502	569	645	664	19	3%
6025 - Electricity	1,019	1,314	1,161	1,112	1,206	1,242	36	3%
6030 - Water/Sewer	121	216	219	166	166	171	5	3%
6035 - Outside Maintenance	334	381	456	376	495	510	15	3%
6040 - Building Repairs	247	669	476	478	610	628	18	3%
6045 - Bldg Mtncn Contracts	897	1,028	1,089	790	786	810	24	3%
6050 - Bldg Mtncn Supplies	139	151	-	-	-	-	-	#DIV/0!
6065 - Bldg Insurance/Fees	382	498	511	534	555	572	17	3%
6070 - Building & Improvements Depr	1,200	1,564	1,508	1,827	2,314	2,314	-	0%
6075 - Furniture & Fixtures Depr	362	392	246	119	118	118	-	0%
7065 - Computers, Equip & Sftwre Depr	4,112	5,025	3,869	2,455	1,739	1,739	-	0%
Total Building Overhead Expenses	10,026	12,693	10,752	8,880	9,383	9,540	156	2%
<b>Total Expenses</b>	<b>304,039</b>	<b>308,115</b>	<b>318,209</b>	<b>301,817</b>	<b>345,550</b>	<b>347,558</b>	<b>(9,234)</b>	<b>-3%</b>
<b>Net Profit (Loss)</b>	<b>\$ (304,039)</b>	<b>\$ (308,115)</b>	<b>\$ (318,209)</b>	<b>\$ (301,817)</b>	<b>\$ (345,550)</b>	<b>\$ (347,558)</b>	<b>\$ 9,234</b>	<b>-3%</b>

Computer/MIS/Internet (i.e. "IT") is included in the Bar Operations department shown on pages 6-8 and 12.

**Utah State Bar**  
**FY23 Draft Budget**  
**Based on Unaudited Actual Results through 3/31/22**  
**CLE**

	Actual FY 2018	Actual FY 2019	Actual FY 2020	Actual FY 2021	Projected FY 2022	Draft Budget FY 2023	\$ Change vs 2023 Budget	% Change 2022 Projected vs 2023 Budget
<b>Revenue</b>								
4052 - Meeting - Sponsor Revenue	15,500	22,550	14,500	7,250	11,675	15,000	3,325	28%
4053 - Meeting - Vendor Revenue	-	-	1,000	-	-	-	-	#DIV/0!
4054 - Meeting - Material Sales	2,185	-	-	-	-	-	-	#DIV/0!
4081 - CLE - Registrations	467,772	451,978	261,754	204,511	217,566	315,000	97,434	45%
4082 - CLE - Video Library Sales	98,348	85,500	121,808	173,086	146,835	146,835	-	0%
4084 - Business Law Book Sales	6,856	3,315	-	-	-	-	-	#DIV/0!
4093 - Law Day Revenue	-	-	-	-	2,500	2,500	-	0%
4200 - Seminar Profit/Loss	(25,626)	(2,037)	(8,023)	(99,849)	1,379	1,379	-	0%
<b>Total Revenue</b>	<b>565,080</b>	<b>561,306</b>	<b>391,038</b>	<b>284,997</b>	<b>379,956</b>	<b>480,714</b>	<b>100,759</b>	<b>27%</b>
<b>Expenses</b>								
<b>Program Services</b>								
5001 - Meeting Facility-external only	10,459	7,290	632	-	6,152	6,152	-	0%
5002 - Meeting facility-internal only	8,220	6,750	5,287	175	1,260	2,644	1,384	110%
5030 - Speaker Fees & Expenses	16,155	11,885	9,163	6,500	11,121	11,121	-	0%
5031 - Speaker Reimb. - Receipt Req'd	17,411	5,837	16,297	-	-	8,148	8,148	#DIV/0!
5035 - Awards	1,763	5,209	5,977	1,282	270	270	-	0%
5037 - Grants/ contributions - general	3,000	-	6,000	-	9,000	9,000	-	0%
5062 - Law Day	-	-	-	-	2,500	8,500	6,000	240%
5063 - Special Event Expense	18,057	16,577	18,284	6,754	19,951	9,142	(10,809)	-54%
5064 - MCLE Fees Paid	29,372	26,491	20,023	27,044	37,553	37,553	-	0%
5070 - Equipment Rental	16,896	6,168	14,281	-	1,869	7,141	5,272	282%
5075 - Food & Bev-external costs only	179,000	136,314	87,836	4,952	45,884	43,918	(1,966)	-4%
5076 - Food & beverage - internal only	19,164	22,115	12,910	-	2,730	6,455	3,725	136%
5085 - Misc. Program Expense	3,856	965	-	-	449	449	-	0%
5702 - Travel - Lodging	7,958	19,723	28,650	7,065	13,949	13,949	-	0%
5703 - Travel - Transportation/Parking	202	4,770	5,199	279	1,716	1,716	-	0%
5704 - Travel - Mileage Reimbursement	735	462	271	502	264	264	-	0%
5706 - Travel - Meals	-	78	-	-	-	-	-	#DIV/0!
5815 - Commission/Education	-	214	-	-	-	-	-	#DIV/0!
5841 - President's Reimbursement	-	191	-	-	-	-	-	#DIV/0!
5850 - Leadership Academy	-	-	-	200	200	200	-	0%
5960 - Overhead Allocation - Seminars	(26,624)	(27,599)	(16,540)	(16,039)	(25,385)	(8,270)	17,115	-67%
5970 - Event Revenue Sharing - 3rd Pty	64,158	42,191	60,197	69,783	60,965	60,965	-	0%
<b>Total Program Services Expenses</b>	<b>369,932</b>	<b>285,631</b>	<b>274,467</b>	<b>108,496</b>	<b>190,448</b>	<b>219,317</b>	<b>28,869</b>	<b>11%</b>
<b>Salaries &amp; Benefits</b>								
5510 - Salaries/Wages	100,837	93,650	107,619	105,057	141,431	190,903	49,472	35%
5605 - Payroll Taxes	8,922	7,613	9,065	8,307	11,707	15,423	3,716	32%
5610 - Health Insurance	12,982	10,452	2,628	874	5,181	15,440	10,259	198%
5630 - Dental Insurance	576	433	122	52	416	1,637	1,221	293%
5640 - Life & LTD Insurance	799	763	773	876	1,095	3,550	2,455	224%
5650 - Retirement Plan Contributions	7,603	7,314	10,784	9,416	10,512	14,027	3,515	33%
5655 - Retirement Plan Fees & Costs	1,072	1,152	1,228	1,088	804	804	-	0%
5660 - Training/Development	1,500	1,090	325	-	700	700	-	0%
<b>Total Salaries/Benefit Expenses</b>	<b>134,302</b>	<b>122,478</b>	<b>132,552</b>	<b>125,670</b>	<b>171,848</b>	<b>242,486</b>	<b>70,637</b>	<b>41%</b>
<b>General &amp; Administrative</b>								
7025 - Office Supplies	1,266	2,142	3,587	211	966	966	-	0%
7033 - Operating Meeting Supplies	-	520	-	-	-	-	-	#DIV/0!
7035 - Postage/Mailing, net	8,071	6,940	7,031	1	1,063	1,063	-	0%
7040 - Copy/Printing Expense	26,107	14,001	18,635	2,512	2,542	2,542	-	0%
7045 - Internet Service	72	196	1,280	4,093	8,047	8,047	-	0%
7050 - Computer Maintenance	1,883	3,130	2,730	2,415	4,158	4,158	-	0%
7055 - Computer Supplies & Small Equip	883	4,169	490	698	1,565	1,565	-	0%
7089 - Membership Database Fees	2,633	-	-	-	-	-	-	#DIV/0!
7100 - Telephone	2,592	2,838	2,722	2,960	2,803	2,803	-	0%
7105 - Advertising	1,150	-	-	147	-	-	-	#DIV/0!
7110 - Publications/Subscriptions	-	-	808	824	990	990	-	0%
7120 - Membership/Dues	561	45	530	545	730	730	-	0%
7135 - Bank Service Charges	118	-	29	-	-	-	-	#DIV/0!
7140 - Credit Card Merchant Fees	12,566	13,122	13,993	15,764	14,206	14,206	-	0%
7141 - Credit Card surcharge	-	-	-	125	-	-	-	#DIV/0!
7175 - O/S Consultants	2,000	1,091	3,838	4,517	5,161	5,161	-	0%
7195 - Other Gen & Adm Expense	180	1,002	1,849	-	133	133	-	0%
<b>Total General &amp; Administrative Expenses</b>	<b>60,080</b>	<b>49,196</b>	<b>57,521</b>	<b>34,811</b>	<b>42,364</b>	<b>42,364</b>	<b>-</b>	<b>0%</b>
<b>Building Overhead</b>								
6015 - Janitorial Expense	680	391	333	223	367	378	11	3%
6020 - Heat	455	270	235	278	316	325	9	3%
6025 - Electricity	995	597	540	544	591	608	18	3%
6030 - Water/Sewer	129	98	102	81	81	84	2	3%
6035 - Outside Maintenance	205	173	216	184	242	249	7	3%
6040 - Building Repairs	199	304	223	234	299	308	9	3%
6045 - Bldg Mtnc Contracts	872	467	512	387	385	397	12	3%
6050 - Bldg Mtnc Supplies	91	69	-	-	-	-	-	#DIV/0!
6055 - Real Property Taxes	11,162	9,052	9,283	10,282	10,216	10,522	306	3%
6060 - Personal Property Taxes	147	132	125	119	113	116	3	3%
6065 - Bldg Insurance/Fees	369	226	239	261	272	280	8	3%
6070 - Building & Improvements Depre	1,157	710	706	894	1,133	1,133	-	0%
6075 - Furniture & Fixtures Depre	348	178	115	58	58	58	-	0%
7065 - Computers, Equip & Sftwre Depre	3,900	2,282	1,813	1,202	852	852	-	0%
<b>Total Building Overhead Expenses</b>	<b>20,709</b>	<b>14,948</b>	<b>14,441</b>	<b>14,749</b>	<b>14,923</b>	<b>15,310</b>	<b>386</b>	<b>3%</b>
<b>Total Expenses</b>	<b>585,023</b>	<b>472,253</b>	<b>478,081</b>	<b>283,726</b>	<b>419,583</b>	<b>519,476</b>	<b>99,892</b>	<b>21%</b>
<b>Net Profit (Loss)</b>	<b>\$ (19,942)</b>	<b>\$ 89,053</b>	<b>\$ (87,943)</b>	<b>\$ 1,271</b>	<b>\$ (39,628)</b>	<b>\$ (38,761)</b>	<b>\$ 866</b>	<b>-2%</b>



**Utah State Bar**  
**FY23 Draft Budget**  
**Based on Unaudited Actual Results through 3/31/22**  
**10 - Summer Convention**

	Actual FY 2018	Actual FY 2019	Actual FY 2020	Actual FY 2021	Projected FY 2022	Draft Budget FY 2023	\$ Change 2022 Projected vs 2023 Budget	% Change 2022 Projected vs 2023 Budget
<b>Revenue</b>								
4051 - Meeting - Registration	234,820	199,695	181,985	-	142,248	168,064	25,816	18%
4052 - Meeting - Sponsor Revenue	20,550	25,500	19,500	-	14,750	30,000	15,250	103%
4053 - Meeting - Vendor Revenue	13,100	9,800	11,800	-	13,800	20,600	6,800	49%
4055 - Meeting - Sp Ev Registration	14,810	15,470	5,300	-	13,235	1,800	(11,435)	-86%
4095 - Miscellaneous Income	-	-	-	-	13,192	-	(13,192)	-100%
<b>Total Revenue</b>	<b>283,280</b>	<b>250,465</b>	<b>218,585</b>	<b>-</b>	<b>197,225</b>	<b>220,464</b>	<b>23,239</b>	<b>12%</b>
<b>Expenses</b>								
<b>Program Services</b>								
5001 - Meeting Facility-external only	6,134	7,406	5,000	-	19,831	15,000	(4,831)	-24%
5002 - Meeting facility-internal only	870	855	475	-	190	1,188	998	525%
5030 - Speaker Fees & Expenses	7,465	1,895	505	-	2,438	-	(2,438)	-100%
5031 - Speaker Reimb. - Receipt Req'd	741	368	217	-	-	1,280	1,280	#DIV/0!
5035 - Awards	75	-	-	-	300	-	(300)	-100%
5063 - Special Event Expense	56,773	59,750	32,769	15	5,487	2,639	(2,848)	-52%
5064 - MCLE Fees Paid	5,347	3,866	6,458	-	3,191	4,503	1,312	41%
5070 - Equipment Rental	9,149	14,120	33,148	-	4,444	20,000	15,556	350%
5075 - Food & Bev-external costs only	109,154	96,975	131,941	-	94,278	102,351	8,073	9%
5076 - Food & beverage - internal only	2,133	2,164	927	-	-	2,923	2,923	#DIV/0!
5085 - Misc. Program Expense	227	11	5,050	-	401	1,494	1,093	272%
5702 - Travel - Lodging	18,191	11,933	5,520	-	10,692	5,709	(4,983)	-47%
5703 - Travel - Transportation/Parking	723	-	2,866	-	229	1,935	1,706	744%
5704 - Travel - Mileage Reimbursement	2,838	5,111	1,243	-	2,880	254	(2,626)	-91%
5705 - Travel - Per Diems	840	651	284	-	2,431	-	(2,431)	-100%
5960 - Overhead Allocation - Seminars	20,000	20,000	20,000	-	20,000	20,000	0	0%
<b>Total Program Services Expenses</b>	<b>240,660</b>	<b>225,105</b>	<b>246,401</b>	<b>15</b>	<b>166,793</b>	<b>179,275</b>	<b>12,482</b>	<b>5%</b>
<b>Salaries &amp; Benefits</b>								
5510 - Salaries/Wages	20,964	19,252	18,503	7,209	17,113	21,323	4,211	25%
5605 - Payroll Taxes	1,560	1,442	1,406	543	1,281	1,581	300	23%
5650 - Retirement Plan Contributions	1,784	1,645	1,442	721	1,648	2,126	478	29%
<b>Total Salaries/Benefit Expenses</b>	<b>24,308</b>	<b>22,341</b>	<b>21,359</b>	<b>8,472</b>	<b>20,041</b>	<b>25,031</b>	<b>4,990</b>	<b>25%</b>
<b>General &amp; Administrative</b>								
7025 - Office Supplies	662	620	673	-	229	143	(86)	-37%
7035 - Postage/Mailing, net	7	-	2,563	-	-	37	37	#DIV/0!
7040 - Copy/Printing Expense	6,881	12,129	2,425	200	259	7,167	6,908	2668%
7045 - Internet Service	-	200	-	-	-	49	49	#DIV/0!
7089 - Membership Database Fees	4,000	4,000	4,000	-	-	4,400	4,400	#DIV/0!
7100 - Telephone	324	96	43	-	-	690	690	#DIV/0!
7110 - Publications/Subscriptions	-	21	-	-	-	-	-	#DIV/0!
7120 - Membership/Dues	106	36	-	-	-	-	-	#DIV/0!
7140 - Credit Card Merchant Fees	5,700	5,733	4,975	-	4,541	3,598	(943)	-21%
7195 - Other Gen & Adm Expense	-	-	-	-	80	73	(7)	-9%
<b>Total General &amp; Administrative Expenses</b>	<b>17,679</b>	<b>22,834</b>	<b>14,679</b>	<b>200</b>	<b>5,109</b>	<b>16,158</b>	<b>11,049</b>	<b>216%</b>
<b>Total Expenses</b>	<b>284,030</b>	<b>270,280</b>	<b>282,439</b>	<b>8,687</b>	<b>191,943</b>	<b>220,464</b>	<b>28,521</b>	<b>10%</b>
<b>Net Profit (Loss)</b>	<b>\$ (750)</b>	<b>\$ (19,815)</b>	<b>\$ (63,854)</b>	<b>\$ (8,687)</b>	<b>\$ 5,282</b>	<b>\$ -</b>	<b>\$ (5,282)</b>	<b>-100%</b>

**Utah State Bar**  
**FY23 Draft Budget**  
**Based on Unaudited Actual Results through 3/31/22**  
**11 - Fall Forum**

	Actual FY 2018	Actual FY 2019	Actual FY 2020	Actual FY 2021	Projected FY 2022	Draft Budget FY 2023	\$ Change 2022 Projected vs 2023 Budget	% Change 2022 Projected vs 2023 Budget
<b>Revenue</b>								
4051 - Meeting - Registration	73,178	72,360	76,499	55,368	86,005	76,260	(9,745)	-11%
4052 - Meeting - Sponsor Revenue	-	-	-	-	-	-	-	#DIV/0!
4053 - Meeting - Vendor Revenue	10,150	6,400	4,950	1,000	1,000	8,400	7,400	740%
4055 - Meeting - Sp Ev Registration	-	-	1,775	-	-	-	-	#DIV/0!
<b>Total Revenue</b>	<b>83,328</b>	<b>78,760</b>	<b>83,224</b>	<b>56,368</b>	<b>87,005</b>	<b>84,660</b>	<b>(2,345)</b>	<b>-3%</b>
<b>Expenses</b>								
<b>Program Services</b>								
5001 - Meeting Facility-external only	3,825	525	-	-	-	578	578	#DIV/0!
5002 - Meeting facility-internal only	190	-	235	-	205	-	(205)	-100%
5030 - Speaker Fees & Expenses	5,460	1,605	-	-	-	1,766	1,766	#DIV/0!
5031 - Speaker Reimb. - Receipt Req'd	387	866	-	-	-	953	953	#DIV/0!
5035 - Awards	-	-	-	-	375	-	(375)	-100%
5064 - MCLE Fees Paid	3,728	2,920	2,892	3,732	5,689	3,212	(2,477)	-44%
5070 - Equipment Rental	6,804	7,501	7,709	-	-	8,251	8,251	#DIV/0!
5075 - Food & Bev-external costs only	31,850	34,757	38,207	-	-	38,232	38,232	#DIV/0!
5076 - Food & beverage - internal only	304	-	85	-	-	-	-	#DIV/0!
5085 - Misc. Program Expense	-	-	-	-	-	1,549	1,549	#DIV/0!
5702 - Travel - Lodging	561	1,408	208	-	-	2	2	#DIV/0!
5703 - Travel - Transportation/Parking	-	2	-	-	-	-	-	#DIV/0!
5960 - Overhead Allocation - Seminars	15,000	15,000	15,000	15,000	15,000	15,000	(0)	0%
<b>Total Program Services Expenses</b>	<b>68,108</b>	<b>64,583</b>	<b>64,336</b>	<b>18,732</b>	<b>21,269</b>	<b>69,541</b>	<b>48,272</b>	<b>75%</b>
<b>Salaries &amp; Benefits</b>								
5510 - Salaries/Wages	9,247	7,291	3,541	1,539	2,886	3,030	144	5%
5605 - Payroll Taxes	717	549	265	132	241	253	12	5%
5650 - Retirement Plan Contributions	672	420	354	154	286	300	14	5%
<b>Total Salaries/Benefit Expenses</b>	<b>10,636</b>	<b>8,263</b>	<b>4,160</b>	<b>1,825</b>	<b>3,413</b>	<b>3,583</b>	<b>171</b>	<b>5%</b>
<b>General &amp; Administrative</b>								
7025 - Office Supplies	-	282	121	-	-	-	-	#DIV/0!
7035 - Postage/Mailing, net	-	-	-	-	-	-	-	#DIV/0!
7040 - Copy/Printing Expense	5,006	4,460	4,763	200	2	4,906	4,905	260884%
7045 - Internet Service	-	225	75	-	-	-	-	#DIV/0!
7050 - Computer Maintenance	-	50	-	-	-	-	-	#DIV/0!
7055 - Computer Supplies & Small Equip	-	273	-	-	-	-	-	#DIV/0!
7089 - Membership Database Fees	4,000	4,050	-	4,310	3,998	4,454	457	11%
7100 - Telephone	198	18	-	-	-	-	-	#DIV/0!
7120 - Membership/Dues	-	36	-	-	-	-	-	#DIV/0!
7138 - Bad debt expense	-	-	-	-	-	-	-	#DIV/0!
7140 - Credit Card Merchant Fees	1,657	1,978	2,141	1,635	2,387	2,176	(211)	-9%
<b>Total General &amp; Administrative Expenses</b>	<b>10,862</b>	<b>11,371</b>	<b>7,100</b>	<b>6,145</b>	<b>6,386</b>	<b>11,536</b>	<b>5,150</b>	<b>81%</b>
<b>Total Expenses</b>	<b>90,989</b>	<b>84,217</b>	<b>75,596</b>	<b>26,701</b>	<b>31,068</b>	<b>84,660</b>	<b>53,593</b>	<b>71%</b>
<b>Net Profit (Loss)</b>	<b>\$ (7,662)</b>	<b>\$ (5,457)</b>	<b>\$ 7,628</b>	<b>\$ 29,666</b>	<b>\$ 55,937</b>	<b>\$ -</b>	<b>\$ (55,938)</b>	<b>-100%</b>

**Utah State Bar**  
**FY23 Draft Budget**  
**Based on Unaudited Actual Results through 3/31/22**  
**12 - Spring Convention**

	Actual FY 2018	Actual FY 2019	Actual FY 2020	Actual FY 2021	Projected FY 2022	Draft Budget FY 2023	\$ Change 2022 Projected vs 2023 Budget	% Change 2022 Projected vs 2023 Budget
<b>Revenue</b>								
4051 - Meeting - Registration	96,030	127,895	(1,655)	56,617	52,800	97,895	45,095	85%
4052 - Meeting - Sponsor Revenue	15,850	13,500	(1,000)	-	-	13,500	13,500	#DIV/0!
4053 - Meeting - Vendor Revenue	9,600	10,950	-	-	4,750	10,950	6,200	131%
4055 - Meeting - Sp Ev Registration	2,046	1,907	495	-	-	1,907	1,907	#DIV/0!
<b>Total Revenue</b>	<b>123,526</b>	<b>154,252</b>	<b>(2,160)</b>	<b>56,617</b>	<b>57,550</b>	<b>124,252</b>	<b>66,702</b>	<b>116%</b>
<b>Expenses</b>								
<b>Program Services</b>								
5001 - Meeting Facility-external only	7,842	8,005	-	-	-	8,805	8,805	#DIV/0!
5002 - Meeting facility-internal only	380	350	285	-	-	385	385	#DIV/0!
5030 - Speaker Fees & Expenses	-	-	-	-	-	-	-	#DIV/0!
5031 - Speaker Reimb. - Receipt Req'd	1,988	2,536	-	-	-	2,789	2,789	#DIV/0!
5035 - Awards	144	-	-	-	152	-	(152)	-100%
5060 - Program Special Activities	-	-	-	-	-	-	-	#DIV/0!
5063 - Special Event Expense	3,629	2,428	383	-	-	2,671	2,671	#DIV/0!
5064 - MCLE Fees Paid	5,865	5,441	-	8,366	9,911	6,985	(2,925)	-30%
5070 - Equipment Rental	4,804	3,510	-	-	-	3,861	3,861	#DIV/0!
5075 - Food & Bev-external costs only	31,727	34,773	15,763	-	46	39,989	39,943	86832%
5076 - Food & beverage - internal only	988	940	849	-	-	1,034	1,034	#DIV/0!
5085 - Misc. Program Expense	-	25	-	-	-	28	28	#DIV/0!
5702 - Travel - Lodging	3,303	6,398	2,333	-	-	7,037	7,037	#DIV/0!
5703 - Travel - Transportation/Parking	858	-	337	-	-	-	-	#DIV/0!
5704 - Travel - Mileage Reimbursement	2,953	2,868	345	-	-	4,010	4,010	#DIV/0!
5705 - Travel - Per Diems	413	620	289	-	-	682	682	#DIV/0!
5707 - Travel - Commission Mtgs	-	-	644	-	-	-	-	#DIV/0!
5960 - Overhead Allocation - Seminars	15,000	15,000	-	15,000	15,000	15,000	-	0%
<b>Total Program Services Expenses</b>	<b>79,894</b>	<b>82,892</b>	<b>21,228</b>	<b>23,366</b>	<b>25,109</b>	<b>93,275</b>	<b>68,166</b>	<b>321%</b>
<b>Salaries &amp; Benefits</b>								
5510 - Salaries/Wages	12,537	13,947	9,410	6,187	2,368	14,645	12,276	518%
5605 - Payroll Taxes	986	1,086	751	486	202	1,140	938	464%
5620 - Health Ins/Medical Reimb	7	12	0	2	1	13	12	1532%
5650 - Retirement Plan Contributions	871	1,211	941	619	237	1,272	1,035	437%
<b>Total Salaries/Benefit Expenses</b>	<b>14,402</b>	<b>16,256</b>	<b>11,102</b>	<b>7,294</b>	<b>2,808</b>	<b>17,069</b>	<b>14,261</b>	<b>508%</b>
<b>General &amp; Administrative</b>								
7025 - Office Supplies	163	-	1,071	-	-	-	-	#DIV/0!
7035 - Postage/Mailing, net	3	-	-	-	-	-	-	#DIV/0!
7040 - Copy/Printing Expense	5,585	5,349	4,299	550	375	5,884	5,509	1468%
7045 - Internet Service	-	225	75	-	-	248	248	#DIV/0!
7089 - Membership Database Fees	4,000	4,000	-	4,310	4,310	4,000	(310)	-7%
7100 - Telephone	234	-	-	-	-	-	-	#DIV/0!
7120 - Membership/Dues	-	36	-	-	-	39	39	#DIV/0!
7140 - Credit Card Merchant Fees	2,256	3,398	6,217	1,682	1,611	3,737	2,126	132%
7195 - Other Gen & Adm Expense	-	-	639	-	-	-	-	#DIV/0!
<b>Total General &amp; Administrative Expenses</b>	<b>12,241</b>	<b>13,007</b>	<b>12,302</b>	<b>6,542</b>	<b>6,297</b>	<b>13,908</b>	<b>7,611</b>	<b>121%</b>
<b>Total Expenses</b>	<b>107,920</b>	<b>112,155</b>	<b>44,632</b>	<b>37,201</b>	<b>34,213</b>	<b>124,252</b>	<b>90,039</b>	<b>202%</b>
<b>Net Profit (Loss)</b>	<b>\$ 15,606</b>	<b>\$ 42,097</b>	<b>\$ (46,792)</b>	<b>\$ 19,416</b>	<b>\$ 23,337</b>	<b>\$ -</b>	<b>\$ (23,337)</b>	<b>-100%</b>

**Utah State Bar**  
**FY23 Draft Budget**  
**Based on Unaudited Actual Results through 3/31/22**  
**13 - Bar Journal**

	Actual FY 2018	Actual FY 2019	Actual FY 2020	Actual FY 2021	Projected FY 2022	Draft Budget FY 2023	\$ Change 2022 Projected vs 2023 Budget	% Change 2022 Projected vs 2023 Budget
<b>Revenue</b>								
4061 - Advertising Revenue	148,172	185,840	169,488	195,858	211,916	211,916	-	0%
4062 - Subscriptions	60	90	90	30	30	30	-	0%
4071 - Mem Benefits - Lexis	696	1,473	1,264	300	-	-	-	#DIV/0!
4072 - Royalty Inc - Bar J, MBNA, LM, M	6,073	6,185	5,590	5,830	5,228	5,228	-	0%
4081 - CLE - Registrations	50	-	-	-	-	-	-	#DIV/0!
<b>Total Revenue</b>	<b>155,076</b>	<b>193,588</b>	<b>176,432</b>	<b>202,017</b>	<b>217,174</b>	<b>217,174</b>	<b>-</b>	<b>0%</b>
<b>Expenses</b>								
<b>Program Services</b>								
5002 - Meeting facility-internal only	1,140	1,045	855	-	-	1,000	1,000	#DIV/0!
5075 - Food & Bev-external costs only	21	213	-	-	-	-	-	#DIV/0!
5076 - Food & beverage - internal only	3,209	3,079	2,112	-	-	3,000	3,000	#DIV/0!
5090 - Commission Expense	28,655	32,683	31,536	39,022	37,456	37,456	-	0%
<b>Total Program Services Expenses</b>	<b>33,025</b>	<b>37,021</b>	<b>34,504</b>	<b>39,022</b>	<b>37,456</b>	<b>41,456</b>	<b>4,000</b>	<b>12%</b>
<b>Salaries &amp; Benefits</b>								
5510 - Salaries/Wages	27,339	27,717	31,014	30,545	33,817	35,508	1,691	5%
5605 - Payroll Taxes	1,761	1,904	2,087	2,146	2,480	2,604	124	5%
5610 - Health Insurance	2,760	2,476	2,847	2,944	3,186	3,345	159	5%
5630 - Dental Insurance	214	217	257	439	454	476	23	5%
5640 - Life & LTD Insurance	195	194	229	400	435	457	22	5%
5650 - Retirement Plan Contributions	2,734	3,025	3,233	3,294	3,653	3,836	183	5%
5655 - Retirement Plan Fees & Costs	355	331	381	544	402	402	-	0%
5660 - Training/Development	175	23	23	-	-	-	-	#DIV/0!
<b>Total Salaries/Benefit Expenses</b>	<b>35,535</b>	<b>35,889</b>	<b>40,072</b>	<b>40,310</b>	<b>44,428</b>	<b>46,629</b>	<b>2,201</b>	<b>5%</b>
<b>General &amp; Administrative</b>								
7025 - Office Supplies	-	-	-	-	60	60	-	0%
7035 - Postage/Mailing, net	30,149	32,187	32,397	32,855	36,748	36,748	-	0%
7040 - Copy/Printing Expense	76,117	74,479	81,107	75,343	85,635	94,199	8,564	10%
7045 - Internet Service	72	421	300	300	465	465	-	0%
7050 - Computer Maintenance	-	-	-	-	312	1,308	995	315%
7055 - Computer Supplies & Small Equip	-	-	-	55	151	158	8	5%
7100 - Telephone	557	632	632	723	701	701	-	0%
7110 - Publications/Subscriptions	-	-	-	129	-	-	-	#DIV/0!
7140 - Credit Card Merchant Fees	898	1,179	1,444	1,668	1,941	1,941	-	0%
7175 - O/S Consultants	-	280	1,202	1,055	888	-	(888)	-100%
<b>Total General &amp; Administrative Expenses</b>	<b>107,793</b>	<b>109,178</b>	<b>117,081</b>	<b>112,128</b>	<b>126,901</b>	<b>135,579</b>	<b>8,678</b>	<b>7%</b>
<b>Building Overhead</b>								
6015 - Janitorial Expense	141	177	147	92	152	156	5	3%
6020 - Heat	105	122	102	115	130	134	4	3%
6025 - Electricity	206	270	237	225	244	251	7	3%
6030 - Water/Sewer	24	44	45	34	34	35	1	3%
6035 - Outside Maintenance	68	78	93	76	100	103	3	3%
6040 - Building Repairs	50	138	97	97	123	127	4	3%
6045 - Bldg Mtncn Contracts	182	211	222	160	159	164	5	3%
6065 - Bldg Insurance/Fees	77	102	104	108	112	116	3	3%
6070 - Building & Improvements Depr	243	322	308	369	468	468	-	0%
6075 - Furniture & Fixtures Depr	73	81	50	24	24	24	-	0%
7065 - Computers, Equip & Sftwre Depr	833	1,033	790	496	352	352	-	0%
<b>Total Building Overhead Expenses</b>	<b>2,031</b>	<b>2,610</b>	<b>2,196</b>	<b>1,795</b>	<b>1,897</b>	<b>1,928</b>	<b>32</b>	<b>2%</b>
<b>Total Expenses</b>	<b>178,384</b>	<b>184,698</b>	<b>193,853</b>	<b>193,255</b>	<b>210,681</b>	<b>225,592</b>	<b>14,911</b>	<b>8%</b>
<b>Net Profit (Loss)</b>	<b>\$ (23,308)</b>	<b>\$ 8,890</b>	<b>\$ (17,421)</b>	<b>\$ 8,762</b>	<b>\$ 6,493</b>	<b>\$ (8,418)</b>	<b>\$ (14,911)</b>	<b>-230%</b>

Bar Journal is included in the Member Services department shown on pages 6-8 and 11.



**Utah State Bar**  
**FY23 Draft Budget**  
**Based on Unaudited Actual Results through 3/31/22**  
**14 - Committees**

	Actual FY 2018	Actual FY 2019	Actual FY 2020	Actual FY 2021	Projected FY 2022	Draft Budget FY 2023	\$ Change 2022 Projected vs 2023 Budget	% Change 2022 Projected vs 2023 Budget
<b>Revenue</b>								
4093 - Law Day Revenue	3,570	2,700	-	-	-	-	-	#DIV/0!
4095 - Miscellaneous Income	40	10	60	20	20	20	-	0%
4200 - Seminar Profit/Loss	-	-	154	-	6,125	6,125	-	0%
<b>Total Revenue</b>	<b>3,610</b>	<b>2,710</b>	<b>214</b>	<b>20</b>	<b>6,145</b>	<b>6,145</b>	<b>-</b>	<b>0%</b>
<b>Expenses</b>								
<b>Program Services</b>								
5002 - Meeting facility-internal only	3,205	3,870	1,925	445	1,615	2,000	385	24%
5035 - Awards	-	64	-	-	-	-	-	#DIV/0!
5061 - LRE - Bar Support	65,000	65,000	65,000	60,000	64,182	60,000	(4,182)	-7%
5062 - Law Day	11,439	7,152	2,500	-	-	-	-	#DIV/0!
5075 - Food & Bev-external costs only	-	126	101	-	-	-	-	#DIV/0!
5076 - Food & beverage - internal only	4,666	5,818	2,898	32	1,124	2,900	1,776	158%
5085 - Misc. Program Expense	6	6	-	-	-	-	-	#DIV/0!
5096 - UDR Support	-	-	-	-	-	-	-	#DIV/0!
5703 - Travel - Transportation/Parking	523	334	-	-	-	150	150	#DIV/0!
5815 - Commission/Education	-	1,050	-	-	-	-	-	#DIV/0!
5866 - Wellbeing Committee	-	18,333	50,978	50,613	74,811	76,311	1,500	2%
5970 - Event Revenue Sharing - 3rd Pty	-	-	-	1,308	1,308	1,308	-	0%
<b>Total Program Services Expenses</b>	<b>84,840</b>	<b>101,753</b>	<b>123,402</b>	<b>112,398</b>	<b>143,040</b>	<b>142,669</b>	<b>(371)</b>	<b>0%</b>
<b>Salaries &amp; Benefits</b>								
5510 - Salaries/Wages	23,209	23,785	22,686	22,557	23,808	24,998	1,190	5%
5605 - Payroll Taxes	1,461	1,361	1,298	1,288	1,374	1,443	69	5%
5610 - Health Insurance	2,760	2,476	2,847	2,944	3,186	3,345	159	5%
5620 - Health Ins/Medical Reimb	3	8	2	0	3	3	0	5%
5630 - Dental Insurance	214	217	186	-	-	-	-	#DIV/0!
5640 - Life & LTD Insurance	195	194	163	-	-	-	-	#DIV/0!
5650 - Retirement Plan Contributions	2,247	2,154	2,016	1,983	2,074	2,178	104	5%
5655 - Retirement Plan Fees & Costs	355	331	232	-	-	-	-	#DIV/0!
5660 - Training/Development	75	23	23	-	-	-	-	#DIV/0!
<b>Total Salaries/Benefit Expenses</b>	<b>30,519</b>	<b>30,547</b>	<b>29,452</b>	<b>28,772</b>	<b>30,445</b>	<b>31,967</b>	<b>1,522</b>	<b>5%</b>
<b>General &amp; Administrative</b>								
7025 - Office Supplies	38	18	8	16	9	9	-	0%
7035 - Postage/Mailing, net	167	408	116	53	38	38	-	0%
7040 - Copy/Printing Expense	1,671	1,855	444	189	518	518	-	0%
7045 - Internet Service	-	450	600	600	550	550	-	0%
7050 - Computer Maintenance	-	-	-	-	312	1,326	1,013	324%
7100 - Telephone	577	645	829	756	714	714	-	0%
7110 - Publications/Subscriptions	42	-	81	-	60	60	-	0%
7175 - O/S Consultants	-	-	718	1,055	888	-	(888)	-100%
7195 - Other Gen & Adm Expense	-	-	-	125	125	125	-	0%
<b>Total General &amp; Administrative Expenses</b>	<b>2,494</b>	<b>3,376</b>	<b>2,796</b>	<b>2,795</b>	<b>3,215</b>	<b>3,340</b>	<b>125</b>	<b>4%</b>
<b>Building Overhead</b>								
6015 - Janitorial Expense	141	177	147	92	152	156	5	3%
6020 - Heat	105	122	102	115	130	134	4	3%
6025 - Electricity	206	270	237	225	244	251	7	3%
6030 - Water/Sewer	24	44	45	34	34	35	1	3%
6035 - Outside Maintenance	68	78	93	76	100	103	3	3%
6040 - Building Repairs	50	138	97	97	123	127	4	3%
6045 - Bldg Mtnce Contracts	182	211	222	160	159	164	5	3%
6050 - Bldg Mtnce Supplies	28	31	-	-	-	-	-	#DIV/0!
6065 - Bldg Insurance/Fees	77	102	104	108	112	116	3	3%
6070 - Building & Improvements Depr	243	322	308	369	468	468	-	0%
6075 - Furniture & Fxtures Depr	73	81	50	24	24	24	-	0%
7065 - Computers, Equip & Sftwre Depr	833	1,033	790	496	352	352	-	0%
<b>Total Building Overhead Expenses</b>	<b>2,031</b>	<b>2,610</b>	<b>2,196</b>	<b>1,795</b>	<b>1,897</b>	<b>1,928</b>	<b>32</b>	<b>2%</b>
<b>Total Expenses</b>	<b>119,884</b>	<b>138,285</b>	<b>157,847</b>	<b>145,761</b>	<b>178,597</b>	<b>179,905</b>	<b>1,308</b>	<b>1%</b>
<b>Net Profit (Loss)</b>	<b>\$ (116,274)</b>	<b>\$ (135,575)</b>	<b>\$ (157,633)</b>	<b>\$ (145,741)</b>	<b>\$ (172,452)</b>	<b>\$ (173,760)</b>	<b>\$ (1,308)</b>	<b>1%</b>

Committees is included in the Public Services department shown on pages 6-8 and 10.



**Utah State Bar**  
**FY23 Draft Budget**  
**Based on Unaudited Actual Results through 3/31/22**  
**15 - Member Benefits**

	Actual FY 2018	Actual FY 2019	Actual FY 2020	Actual FY 2021	Projected FY 2022	Draft Budget FY 2023	\$ Change 2022 Projected vs 2023 Budget	% Change 2022 Projected vs 2023 Budget
<b>Revenue</b>								
4071 - Mem Benefits - Lexis	-	-	-	900	1,279	1,279	-	0%
4072 - Royalty Inc - Bar J, MBNA, LM, M	151	616	1,259	2,345	6,210	6,210	-	0%
4095 - Miscellaneous Income	-	5,000	-	10	-	-	-	#DIV/0!
<b>Total Revenue</b>	<b>151</b>	<b>5,616</b>	<b>1,259</b>	<b>3,255</b>	<b>7,489</b>	<b>7,489</b>	<b>-</b>	<b>0%</b>
<b>Expenses</b>								
<b>Program Services</b>								
5047 - Casemaker	71,313	72,584	49,645	53,992	54,340	50,000	(4,340)	-8%
5099 - Blomquist Hale	73,946	73,832	73,703	77,738	90,000	90,000	-	0%
<b>Total Program Services Expenses</b>	<b>145,259</b>	<b>146,416</b>	<b>123,348</b>	<b>131,729</b>	<b>144,340</b>	<b>140,000</b>	<b>(4,340)</b>	<b>-4%</b>
<b>Salaries &amp; Benefits</b>								
5510 - Salaries/Wages	544	293	-	204	136	143	7	5%
5605 - Payroll Taxes	40	18	-	15	10	10	0	5%
5650 - Retirement Plan Contributions	54	29	-	20	14	14	-	0%
<b>Total Salaries/Benefit Expenses</b>	<b>638</b>	<b>340</b>	<b>-</b>	<b>240</b>	<b>159</b>	<b>167</b>	<b>7</b>	<b>5%</b>
<b>General &amp; Administrative</b>								
7040 - Copy/Printing Expense	-	-	-	18	-	-	-	#DIV/0!
7089 - Membership Database Fees	2,750	-	-	-	-	-	-	#DIV/0!
<b>Total General &amp; Administrative Expenses</b>	<b>2,750</b>	<b>-</b>	<b>-</b>	<b>18</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>#DIV/0!</b>
<b>Total Expenses</b>	<b>149,481</b>	<b>146,756</b>	<b>123,348</b>	<b>131,987</b>	<b>144,499</b>	<b>140,166</b>	<b>(4,333)</b>	<b>-4%</b>
<b>Net Profit (Loss)</b>	<b>\$ (149,330)</b>	<b>\$ (141,140)</b>	<b>\$ (122,088)</b>	<b>\$ (128,732)</b>	<b>\$ (137,010)</b>	<b>\$ (132,677)</b>	<b>\$ 4,333</b>	<b>-3%</b>

Member Benefits is included in the Member Services department shown on pages 6-8 and 11.

**Utah State Bar**  
**FY23 Draft Budget**  
**Based on Unaudited Actual Results through 3/31/22**  
**16 - Section Support**

	Actual FY 2018	Actual FY 2019	Actual FY 2020	Actual FY 2021	Projected FY 2022	Draft Budget FY 2023	\$ Change 2022 Projected vs 2023 Budget	% Change 2022 Projected vs 2023 Budget
<b>Revenue</b>								
4010 - Section/Local Bar Support fees	81,844	81,809	83,236	82,904	84,399	86,087	1,688	2%
<b>Total Revenue</b>	81,844	81,809	83,236	82,904	84,399	86,087	1,688	2%
<b>Expenses</b>								
<b>Salaries &amp; Benefits</b>								
5510 - Salaries/Wages	49,251	50,386	41,004	32,178	19,270	20,234	964	5%
5605 - Payroll Taxes	3,991	4,079	3,266	2,678	1,660	1,743	83	5%
5610 - Health Insurance	4,193	9,176	10,325	2,625	1,500	1,575	75	5%
5620 - Health Ins/Medical Reimb	56	44	-	-	-	-	-	#DIV/0!
5630 - Dental Insurance	429	398	435	101	120	126	6	5%
5640 - Life & LTD Insurance	317	268	297	75	150	158	8	5%
5645 - Workman's Comp Insurance	-	-	-	-	-	-	-	#DIV/0!
5650 - Retirement Plan Contributions	3,844	1,189	3,486	3,097	2,544	2,671	127	5%
5655 - Retirement Plan Fees & Costs	526	174	614	133	133	133	-	0%
5660 - Training/Development	250	45	45	-	-	-	-	#DIV/0!
66000 - Payroll Expenses	-	-	-	-	-	-	-	#DIV/0!
<b>Total Salaries/Benefit Expenses</b>	62,857	65,758	59,473	40,888	25,377	26,639	1,262	5%
<b>General &amp; Administrative</b>								
7040 - Copy/Printing Expense	21	375	-	-	1,500	-	(1,500)	-100%
7045 - Internet Service	2,907	3,147	-	-	1,276	1,638	362	28%
7050 - Computer Maintenance	941	945	989	989	115	115	-	0%
7089 - Membership Database Fees	117	-	-	-	1,402	1,402	-	0%
7100 - Telephone	1,115	1,263	1,264	1,445	271	-	(271)	-100%
7175 - O/S Consultants	-	280	1,919	422	4,563	3,155	(1,409)	-31%
<b>Total General &amp; Administrative Expenses</b>	5,102	6,011	4,172	2,856	4,563	3,155	(1,409)	-31%
<b>Building Overhead</b>								
6015 - Janitorial Expense	209	229	195	131	215	222	6	3%
6020 - Heat	152	158	138	163	185	191	6	3%
6025 - Electricity	306	350	317	319	346	357	10	3%
6030 - Water/Sewer	37	58	60	48	48	49	1	3%
6035 - Outside Maintenance	92	101	127	108	142	146	4	3%
6040 - Building Repairs	71	178	131	137	175	180	5	3%
6045 - Bldg Mtncn Contracts	269	274	300	227	226	233	7	3%
6055 - Real Property Taxes	11,162	9,052	9,283	10,282	10,216	10,522	306	3%
6060 - Personal Property Taxes	147	132	125	119	113	116	3	3%
6065 - Bldg Insurance/Fees	114	133	140	153	159	164	5	3%
6070 - Building & Improvements Depr	359	416	414	524	664	664	-	0%
6075 - Furniture & Fixtures Depr	108	105	68	34	34	34	-	0%
7065 - Computers, Equip & Sftwre Depr	1,226	1,338	1,063	705	500	500	-	0%
<b>Total Building Overhead Expenses</b>	14,292	12,564	12,360	12,951	13,023	13,378	355	3%
<b>Total Expenses</b>	83,172	84,339	76,004	56,695	42,963	43,171	208	0%
<b>Net Profit (Loss)</b>	\$ (1,328)	\$ (2,530)	\$ 7,232	\$ 26,209	\$ 41,436	\$ 42,916	\$ 1,480	4%

Section Support is included in the Member Services department shown on pages 6-8 and 11.

**Utah State Bar**  
**FY23 Draft Budget**  
**Based on Unaudited Actual Results through 3/31/22**  
**17 - Consumer Assistance**

	Actual FY 2018	Actual FY 2019	Actual FY 2020	Actual FY 2021	Projected FY 2022	Draft Budget FY 2023	\$ Change 2022 Projected vs 2023 Budget	% Change 2022 Projected vs 2023 Budget
<b>Expenses</b>								
Program Services								
Salaries & Benefits								
5510 - Salaries/Wages	93,608	93,223	98,372	95,952	91,473	96,047	4,574	5%
5605 - Payroll Taxes	6,180	6,396	6,763	6,979	7,539	7,916	377	5%
5610 - Health Insurance	10,396	11,184	11,304	9,834	10,284	10,798	514	5%
5630 - Dental Insurance	429	433	443	439	454	476	23	5%
5640 - Life & LTD Insurance	603	600	604	612	640	672	32	5%
5650 - Retirement Plan Contributions	9,008	9,221	9,597	9,405	9,438	9,910	472	5%
5655 - Retirement Plan Fees & Costs	710	663	614	544	402	402	-	0%
5660 - Training/Development	670	45	280	-	75	79	4	5%
Total Salaries/Benefit Expenses	121,603	121,764	127,976	123,765	120,304	126,299	5,995	5%
General & Administrative								
7025 - Office Supplies	228	253	498	183	256	256	-	0%
7035 - Postage/Mailing, net	358	283	288	237	88	88	-	0%
7040 - Copy/Printing Expense	31	21	11	1	4	4	-	0%
7050 - Computer Maintenance	-	-	-	-	625	2,614	1,989	318%
7055 - Computer Supplies & Small Equip	-	27	-	-	154	162	8	5%
7100 - Telephone	3,049	3,626	2,716	2,852	2,850	2,850	-	0%
7120 - Membership/Dues	555	595	615	630	630	630	-	0%
7175 - O/S Consultants	-	280	1,919	2,110	1,776	-	(1,776)	-100%
Total General & Administrative Expenses	4,220	5,086	6,047	6,013	6,383	6,604	221	3%
Building Overhead								
6015 - Janitorial Expense	344	205	174	117	192	198	6	3%
6020 - Heat	231	141	123	146	165	170	5	3%
6025 - Electricity	503	313	283	285	309	318	9	3%
6030 - Water/Sewer	65	51	53	43	43	44	1	3%
6035 - Outside Maintenance	105	91	113	96	127	131	4	3%
6040 - Building Repairs	101	159	117	123	156	161	5	3%
6045 - Bldg Mtncn Contracts	441	244	268	203	202	208	6	3%
6065 - Bldg Insurance/Fees	187	118	125	137	142	147	4	3%
6070 - Building & Improvements Depr	585	372	370	468	593	593	-	0%
6075 - Furniture & Fixtures Depr	176	93	60	31	30	30	-	0%
7065 - Computers, Equip & Sftwre Depr	1,974	1,195	949	629	446	446	-	0%
Total Building Overhead Expenses	4,759	3,018	2,635	2,277	2,406	2,446	40	2%
Total Expenses	130,618	129,886	136,659	132,054	129,093	135,349	6,256	5%
<b>Net Profit (Loss)</b>	<b>\$ (130,618)</b>	<b>\$ (129,886)</b>	<b>\$ (136,659)</b>	<b>\$ (132,054)</b>	<b>\$ (129,093)</b>	<b>\$ (135,349)</b>	<b>\$ (6,256)</b>	<b>5%</b>

Consumer Assistance is included in the Public Services department shown on pages 6-8 and 10.

**Utah State Bar**  
**FY23 Draft Budget**  
**Based on Unaudited Actual Results through 3/31/22**  
**18 - Access to Justice**

	Actual FY 2018	Actual FY 2019	Actual FY 2020	Actual FY 2021	Projected FY 2022	Draft Budget FY 2023	\$ Change 2022 Projected vs 2023 Budget	% Change 2022 Projected vs 2023 Budget
<b>Revenue</b>								
4063 - Modest Means revenue	11,200	10,725	10,525	12,400	12,100	10,000	(2,100)	-17%
4120 - Grant Income	-	55,219	41,739	39,576	27,178	-	(27,178)	-100%
4200 - Seminar Profit/Loss	(487)	-	850	-	1,146	1,146	-	0%
Total Revenue	10,713	65,944	53,114	51,976	40,425	11,146	(29,278)	-72%
<b>Expenses</b>								
<b>Program Services</b>								
5002 - Meeting facility-internal only	2,470	2,938	760	-	95	750	655	689%
5035 - Awards	-	48	-	-	1,500	1,500	-	0%
5037 - Grants/ contributions - general	4,000	1,000	1,000	-	-	1,000	1,000	#DIV/0!
5063 - Special Event Expense	-	-	-	-	266	271	5	2%
5075 - Food & Bev-external costs only	2,338	2,701	619	-	300	310	9	3%
5076 - Food & beverage - internal only	5,826	6,895	5,062	-	1,012	2,531	1,519	150%
5079 - Soft Drinks	-	-	-	-	12	12	0	2%
5085 - Misc. Program Expense	-	113	-	-	-	-	-	#DIV/0!
5702 - Travel - Lodging	1,460	1,519	-	-	235	2,716	2,481	1056%
5703 - Travel - Transportation/Parking	822	785	77	-	-	1,100	1,100	#DIV/0!
5704 - Travel - Mileage Reimbursement	1,366	1,157	-	-	-	1,134	1,134	#DIV/0!
5705 - Per Diems	-	-	-	-	-	-	-	#DIV/0!
5705 - Travel - Per Diems	162	215	-	-	-	1,094	1,094	#DIV/0!
5706 - Travel - Meals	153	-	-	-	-	-	-	#DIV/0!
Total Program Services Expenses	18,598	17,371	7,884	-	3,420	12,418	8,998	114%
<b>Salaries &amp; Benefits</b>								
5510 - Salaries/Wages	86,966	100,595	141,467	144,615	171,407	183,977	12,570	7%
5605 - Payroll Taxes	6,997	8,347	12,434	11,692	13,282	14,446	1,164	9%
5610 - Health Insurance	7,388	7,300	13,318	16,888	22,280	23,394	1,114	5%
5620 - Health Ins/Medical Reimb	1,074	1,908	76	895	1,191	1,251	60	5%
5630 - Dental Insurance	787	793	1,235	1,125	1,249	1,311	62	5%
5640 - Life & LTD Insurance	678	694	1,321	1,136	1,150	1,207	57	5%
5645 - Workman's Comp Insurance	-	-	-	-	-	-	-	#DIV/0!
5650 - Retirement Plan Contributions	3,609	5,737	2,115	6,415	11,444	16,936	5,492	48%
5655 - Retirement Plan Fees & Costs	353	827	298	810	402	402	-	0%
5660 - Training/Development	2,450	640	835	-	-	525	525	#DIV/0!
Total Salaries/Benefit Expenses	110,302	126,842	173,099	183,576	222,404	243,450	21,045	9%
<b>General &amp; Administrative</b>								
7025 - Office Supplies	1,058	486	100	5	469	469	-	0%
7035 - Postage/Mailing, net	178	158	71	68	500	850	350	70%
7040 - Copy/Printing Expense	3,292	1,153	636	22	610	750	140	23%
7045 - Internet Service	640	-	592	257	592	604	12	2%
7050 - Computer Maintenance	8,483	8,491	8,735	8,577	10,487	15,991	5,504	52%
7055 - Computer Supplies & Small Equip	-	242	246	2,011	15	16	1	5%
7089 - Membership Database Fees	683	-	-	-	-	7,000	7,000	#DIV/0!
7100 - Telephone	2,929	2,588	3,125	4,336	4,205	4,205	-	0%
7105 - Advertising	75	150	240	86	165	165	-	0%
7110 - Publications/Subscriptions	-	37	-	97	198	198	-	0%
7120 - Membership/Dues	405	375	434	435	540	1,080	540	100%
7140 - Credit Card Merchant Fees	449	462	452	457	457	457	-	0%
7150 - E&O/Olf & Dir Insurance	14,253	14,327	14,478	14,774	15,605	15,605	-	0%
7175 - O/S Consultants	-	561	6,740	43,028	4,980	0	(4,980)	-100%
7195 - Other Gen & Adm Expense	-	-	467	-	336	342	7	2%
Total General & Administrative Expenses	32,445	29,029	36,315	74,152	39,158	47,732	8,574	22%
<b>Building Overhead</b>								
6015 - Janitorial Expense	773	661	563	378	621	640	19	3%
6020 - Heat	541	456	398	471	535	551	16	3%
6025 - Electricity	1,132	1,011	914	922	1,000	1,030	30	3%
6030 - Water/Sewer	142	166	172	137	138	142	4	3%
6035 - Outside Maintenance	291	293	366	312	410	422	12	3%
6040 - Building Repairs	247	514	378	396	505	521	15	3%
6045 - Bldg Mtncn Contracts	994	790	866	655	652	671	20	3%
6050 - Bldg Mtncn Supplies	125	116	-	-	-	-	-	#DIV/0!
6065 - Bldg Insurance/Fees	422	383	405	443	460	474	14	3%
6070 - Building & Improvements Depr	1,323	1,202	1,195	1,514	1,918	1,918	-	0%
6075 - Furniture & Fixtures Depr	399	302	195	99	97	97	-	0%
7065 - Computers, Equip & Sftwre Depr	4,493	3,864	3,069	2,035	1,442	1,442	-	0%
Total Building Overhead Expenses	10,883	9,758	8,520	7,362	7,779	7,908	130	2%
<b>Total Expenses</b>	172,228	183,001	225,819	265,090	272,761	311,508	38,747	17%
<b>Net Profit (Loss)</b>	\$ (161,515)	\$ (117,057)	\$ (172,705)	\$ (213,114)	\$ (232,336)	\$ (300,361)	\$ (68,025)	29%

Access to Justice is included in the Public Services department shown on pages 6-8 and 10.

**Utah State Bar**  
**FY23 Draft Budget**  
**Based on Unaudited Actual Results through 3/31/22**  
**19 - Tuesday Night Bar**

	Actual FY 2018	Actual FY 2019	Actual FY 2020	Actual FY 2021	Projected FY 2022	Draft Budget FY 2023	\$ Change 2022 Projected vs 2023 Budget	% Change 2022 Projected vs 2023 Budget
<b>Expenses</b>								
Program Services								
5002 - Meeting facility-internal only	26,999	25,271	19,579	-	-	-	-	#DIV/0!
5075 - Food & Bev-external costs only	452	429	361	-	-	-	-	#DIV/0!
5076 - Food & beverage - internal only	1,156	350	270	-	-	-	-	#DIV/0!
5085 - Misc. Program Expense	4,518	4,800	3,066	-	-	-	-	0%
<b>Total Program Services Expenses</b>	<b>33,125</b>	<b>30,851</b>	<b>23,276</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>0%</b>
Salaries & Benefits								
5510 - Salaries/Wages	2,508	2,354	3,076	298	240	-	(240)	-100%
5605 - Payroll Taxes	206	199	257	22	60	-	(60)	-100%
5620 - Health Ins/Medical Reimb	32	54	2	5	-	-	-	#DIV/0!
5650 - Retirement Plan Contributions	110	168	23	-	(23)	-	23	-100%
<b>Total Salaries/Benefit Expenses</b>	<b>2,856</b>	<b>2,775</b>	<b>3,357</b>	<b>325</b>	<b>276</b>	<b>-</b>	<b>(276)</b>	<b>-100%</b>
General & Administrative								
7025 - Office Supplies	-	5	-	-	-	-	-	#DIV/0!
7110 - Publications/Subscriptions	714	743	780	912	-	-	-	#DIV/0!
7175 - O/S Consultants	-	-	667	-	-	-	-	#DIV/0!
<b>Total General &amp; Administrative Expenses</b>	<b>714</b>	<b>748</b>	<b>1,448</b>	<b>912</b>	<b>-</b>	<b>-</b>	<b>(276)</b>	<b>-1%</b>
<b>Total Expenses</b>	<b>36,695</b>	<b>34,373</b>	<b>28,081</b>	<b>1,236</b>	<b>276</b>	<b>-</b>	<b>276</b>	<b>-100%</b>
<b>Net Profit (Loss)</b>	<b>\$ (36,695)</b>	<b>\$ (34,373)</b>	<b>\$ (28,081)</b>	<b>\$ (1,236)</b>	<b>\$ (276)</b>	<b>\$ -</b>	<b>\$ 276</b>	<b>-100%</b>

Tuesday Night Bar is included in the Public Services department shown on pages 6-8 and 10.

Note that Tuesday Night Bar has been moved to an virtual format and therefore incurs very little expenses except staff time. As such, Tuesday Night Bar expenses have been absorbed by the Access to Justice department, which has always been the department that managed the program. Tuesday Night Bar will be phased out as a department and instead will simply be a function of the Access to Justice department.



**Utah State Bar**  
**FY23 Draft Budget**  
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**20 - Legislative**

	Actual FY 2018	Actual FY 2019	Actual FY 2020	Actual FY 2021	Projected FY 2022	Draft Budget FY 2023	\$ Change 2022 Projected vs 2023 Budget	% Change 2022 Projected vs 2023 Budget
<b>Expenses</b>								
Program Services								
5002 - Meeting facility-internal only	1,880	1,360	1,350	-	-	675	675	#DIV/0!
5055 - Legislative Expense	44,126	47,505	66,719	60,000	60,000	60,000	-	0%
5070 - Equipment Rental	-	-	269	-	-	250	250	#DIV/0!
5075 - Food & Bev-external costs only	-	2,116	421	-	-	211	211	#DIV/0!
5076 - Food & beverage - internal only	5,162	3,329	3,474	-	-	1,737	1,737	#DIV/0!
5702 - Travel - Lodging	-	681	-	-	-	750	750	#DIV/0!
5703 - Travel - Transportation/Parking	-	1,099	-	-	-	1,500	1,500	#DIV/0!
5706 - Travel - Meals	-	270	-	-	-	350	350	#DIV/0!
5820 - ABA Annual Delegate	-	1,938	-	-	-	2,500	2,500	#DIV/0!
Total Program Services Expenses	51,168	58,298	72,234	60,000	60,000	67,973	7,973	11%
Salaries & Benefits								
5510 - Salaries/Wages	1,810	7,317	4,754	1,217	2,587	4,991	2,405	93%
5605 - Payroll Taxes	133	582	212	47	217	223	6	3%
5650 - Retirement Plan Contributions	163	724	462	122	172	462	290	169%
Total Salaries/Benefit Expenses	2,108	8,624	5,427	1,386	2,975	5,676	2,700	91%
General & Administrative								
7100 - Telephone	-	80	86	-	-	100	100	#DIV/0!
7170 - Lobbying Rebates	7	180	140	227	209	214	4	2%
Total General & Administrative Expenses	7	260	225	227	209	314	104	50%
Total Expenses	53,283	67,182	77,886	61,613	63,185	73,962	10,777	14%
<b>Net Profit (Loss)</b>	<b>\$ (53,283)</b>	<b>\$ (67,182)</b>	<b>\$ (77,886)</b>	<b>\$ (61,613)</b>	<b>\$ (63,185)</b>	<b>\$ (73,962)</b>	<b>\$ (10,777)</b>	<b>17%</b>

Legislative is included in the Member Services department shown on pages 6-8 and 11.

**Utah State Bar**  
**FY23 Draft Budget**  
**Based on Unaudited Actual Results through 3/31/22**  
**21 - Commission/Sp Projects**

	Actual FY 2018	Actual FY 2019	Actual FY 2020	Actual FY 2021	Projected FY 2022	Draft Budget FY 2023	\$ Change 2022 Projected vs 2023 Budget	% Change 2022 Projected vs 2023 Budget
<b>Revenue</b>								
4090 - Tenant Rent	-	-	-	-	-	-	-	#DIV/0!
4200 - Seminar Profit/Loss	(677)	(549)	-	-	-	-	-	#DIV/0!
Total Revenue	(677)	(549)	-	-	-	-	-	#DIV/0!
<b>Expenses</b>								
<b>Program Services</b>								
5001 - Meeting Facility-external only	512	1,002	-	-	3,388	2,844	(544)	-16%
5002 - Meeting facility-internal only	4,975	3,595	3,345	780	1,230	750	(480)	-39%
5030 - Speaker Fees & Expenses	-	250	-	-	-	-	-	#DIV/0!
5035 - Awards	1,144	2,068	2,462	3,828	5,729	1,000	(4,729)	-83%
5037 - Grants/ contributions - general	1,600	2,170	1,000	-	351,780	3,000	(348,780)	-99%
5042 - Operations Audit	-	-	-	-	-	30,000	30,000	#DIV/0!
5063 - Special Event Expense	697	1,288	764	-	310	3,000	2,690	868%
5070 - Equipment Rental	296	1,139	-	-	-	-	-	#DIV/0!
5075 - Food & Bev-external costs only	22,819	13,827	9,043	469	2,396	5,500	3,104	130%
5076 - Food & beverage - internal only	9,314	8,675	5,970	381	1,553	2,000	447	29%
5090 - Commission Expense	-	-	-	2,371	-	-	-	#DIV/0!
5702 - Travel - Lodging	6,377	2,132	6,928	-	1,449	1,100	(349)	-24%
5703 - Travel - Transportation/Parking	1,393	2,565	1,539	-	1,773	1,300	(473)	-27%
5704 - Travel - Mileage Reimbursement	185	2,784	2,132	-	241	1,400	1,159	481%
5705 - Travel - Per Diems	2,297	556	138	-	253	470	217	86%
5706 - Travel - Meals	358	-	-	-	-	-	-	#DIV/0!
5707 - Travel - Commission Mtgs	39,223	54,457	14,339	-	38,550	52,500	13,950	36%
5805 - ABA Annual Meeting	1,567	3,901	4,788	-	-	2,000	2,000	#DIV/0!
5810 - ABA Mid Year Meeting	8,760	2,872	5,655	-	2,738	2,000	(738)	-27%
5815 - Commission/Education	23,165	22,680	15,100	-	15,000	17,000	2,000	13%
5820 - ABA Annual Delegate	15,784	8,343	8,363	-	2,608	3,600	992	38%
5830 - Western States Bar Conference	6,076	17,507	4,576	-	6,505	7,500	995	15%
5840 - President's Expense	19,687	20,403	28,197	18,163	20,000	20,000	-	0%
5841 - President's Reimbursement	5,554	1,594	2,899	-	-	-	-	#DIV/0!
5845 - Reg Reform Task Force	-	6,012	4,571	-	-	-	-	#DIV/0!
5850 - Leadership Academy	12,400	12,471	11,645	-	10,000	10,000	0	0%
5855 - Bar Review	2,219	1,729	431	-	6,000	-	(6,000)	-100%
5865 - Retreat	34,356	31,293	20,089	-	22,308	30,000	7,692	34%
5866 - Wellbeing Committee	-	120	-	120	120	-	(120)	-100%
5867 - Bar Membership Survey	-	-	19,000	-	7,750	-	(7,750)	-100%
5868 - UCLI Support	-	-	50,000	-	-	-	-	#DIV/0!
Total Program Services Expenses	220,758	225,432	222,572	26,111	501,681	196,964	(304,717)	-137%
<b>Salaries &amp; Benefits</b>								
5510 - Salaries/Wages	1,500	755	680	183	72	375	303	420%
5605 - Payroll Taxes	114	61	54	15	6	65	59	927%
5620 - Health Ins/Medical Reimb	5	11	3	4	1	11	10	675%
5650 - Retirement Plan Contributions	103	45	46	17	7	49	42	580%
5660 - Training/Development	-	-	-	-	850	867	17	2%
Total Salaries/Benefit Expenses	1,723	872	782	218	937	1,367	430	46%
<b>General &amp; Administrative</b>								
7025 - Office Supplies	377	161	-	-	223	299	76	34%
7035 - Postage/Mailing, net	138	381	153	539	570	500	(70)	-12%
7040 - Copy/Printing Expense	4,092	2,007	4,531	544	2,374	5,000	2,626	111%
7045 - Internet Service	1,458	1,073	1,642	-	-	-	-	#DIV/0!
7055 - Computer Supplies & Small Equip	-	-	-	182	-	-	-	#DIV/0!
7100 - Telephone	253	203	713	22	8	400	392	5212%
7107 - Production Costs	-	-	-	-	-	5,000	5,000	#DIV/0!
7120 - Membership/Dues	-	-	-	135	198	203	5	3%
7135 - Bank Service Charges	-	-	24	-	-	-	-	#DIV/0!
7145 - Commission Election Expense	3,256	1,912	2,693	2,717	3,013	3,013	-	0%
7150 - E&O/Off & Dir Insurance	5,112	5,292	5,292	5,800	6,607	5,700	(907)	-14%
7195 - Other Gen & Adm Expense	1,134	638	1,344	808	4,336	700	(3,636)	-84%
Total General & Administrative Expenses	15,819	11,666	16,392	10,747	17,328	20,815	3,486	20%
<b>Total Expenses</b>	238,300	237,970	240,146	37,076	519,947	219,146	(300,801)	-125%
<b>Net Profit (Loss)</b>	\$ (238,977)	\$ (238,520)	\$ (240,146)	\$ (37,076)	\$ (519,947)	\$ (219,146)	\$ 300,801	-58%

Commission/Special Projects is included in the Bar Operations department shown on pages 6-8 and 12.

**Utah State Bar**  
**FY23 Draft Budget**  
**Based on Unaudited Actual Results through 3/31/22**  
**22 - Public Education**

	Actual FY 2018	Actual FY 2019	Actual FY 2020	Actual FY 2021	Projected FY 2022	Draft Budget FY 2023	\$ Change 2022 Projected vs 2023 Budget	% Change 2022 Projected vs 2023 Budget
<b>Revenue</b>								
<b>Expenses</b>								
<b>Program Services</b>								
5062 - Law Day	-	3,600	3,475	-	-	-	-	#DIV/0!
5075 - Food & Bev-external costs only	285	24	-	-	-	-	-	#DIV/0!
5076 - Food & beverage - internal only	-	-	737	-	-	737	737	#DIV/0!
5702 - Travel - Lodging	-	581	612	-	-	306	306	#DIV/0!
5703 - Travel - Transportation/Parking	-	416	378	-	-	189	189	#DIV/0!
5704 - Travel - Mileage Reimbursement	-	1,163	634	-	-	317	317	#DIV/0!
5705 - Travel - Per Diems	-	165	184	-	-	92	92	#DIV/0!
<b>Total Program Services Expenses</b>	<b>285</b>	<b>5,950</b>	<b>6,019</b>	<b>-</b>	<b>-</b>	<b>1,641</b>	<b>1,641</b>	<b>27%</b>
<b>Salaries &amp; Benefits</b>								
5510 - Salaries/Wages	49,457	63,300	65,837	63,895	67,213	70,573	3,361	5%
5605 - Payroll Taxes	3,930	4,836	5,084	4,976	5,152	5,410	258	5%
5610 - Health Insurance	4,204	6,690	7,792	9,340	10,044	10,546	502	5%
5620 - Health Ins/Medical Reimb	600	1,189	600	-	-	-	-	#DIV/0!
5630 - Dental Insurance	279	433	443	439	454	476	23	5%
5640 - Life & LTD Insurance	307	450	455	463	456	479	23	5%
5645 - Workman's Comp Insurance	-	-	-	-	-	-	-	#DIV/0!
5650 - Retirement Plan Contributions	-	4,528	6,336	6,273	6,434	6,755	322	5%
5655 - Retirement Plan Fees & Costs	-	489	614	544	402	402	-	0%
5660 - Training/Development	250	440	340	-	25	26	1	2%
66000 - Payroll Expenses	-	-	-	-	-	-	-	#DIV/0!
<b>Total Salaries/Benefit Expenses</b>	<b>59,028</b>	<b>82,355</b>	<b>87,500</b>	<b>85,930</b>	<b>90,179</b>	<b>94,667</b>	<b>4,488</b>	<b>5%</b>
<b>General &amp; Administrative</b>								
7025 - Office Supplies	211	-	-	130	130	130	-	0%
7040 - Copy/Printing Expense	2,310	2,059	1,959	188	76	76	-	0%
7045 - Internet Service	1,188	1,188	792	1,372	3,637	3,637	-	0%
7050 - Computer Maintenance	-	3,309	840	-	625	2,521	1,896	303%
7055 - Computer Supplies & Small Equip	105	-	364	-	402	422	20	5%
7100 - Telephone	1,115	1,263	1,264	1,445	1,402	1,402	-	0%
7105 - Advertising	45,605	53,110	31,166	2,500	5,226	45,000	39,774	761%
7107 - Production Costs	-	-	3,000	-	2,500	2,500	-	0%
7110 - Publications/Subscriptions	721	1,116	1,535	1,619	1,620	1,620	-	0%
7115 - Public Relations	50,280	-	49,997	-	-	-	-	#DIV/0!
7120 - Membership/Dues	135	135	135	135	90	90	-	0%
7175 - O/S Consultants	500	280	1,252	2,110	1,776	-	(1,776)	-100%
7195 - Other Gen & Adm Expense	-	592	-	-	-	-	-	#DIV/0!
<b>Total General &amp; Administrative Expenses</b>	<b>102,179</b>	<b>63,053</b>	<b>92,303</b>	<b>9,500</b>	<b>17,483</b>	<b>57,397</b>	<b>39,914</b>	<b>228%</b>
<b>Building Overhead</b>								
6015 - Janitorial Expense	333	354	293	184	239	247	7	3%
6020 - Heat	241	244	205	230	185	190	6	3%
6025 - Electricity	488	541	475	449	416	429	12	3%
6030 - Water/Sewer	59	89	90	67	60	61	2	3%
6035 - Outside Maintenance	144	157	186	152	148	153	4	3%
6040 - Building Repairs	113	275	194	193	225	231	7	3%
6045 - Bldg Mtnc Contracts	430	423	444	319	253	260	8	3%
6050 - Bldg Mtnc Supplies	61	62	-	-	-	-	-	#DIV/0!
6065 - Bldg Insurance/Fees	183	205	209	216	225	231	7	3%
6070 - Building & Improvements Depr	573	643	616	738	755	755	-	0%
6075 - Furniture & Fixtures Depr	173	161	101	48	42	42	-	0%
7065 - Computers, Equip & Sftwre Depr	1,955	2,067	1,580	993	575	575	-	0%
<b>Total Building Overhead Expenses</b>	<b>4,754</b>	<b>5,220</b>	<b>4,392</b>	<b>3,590</b>	<b>3,122</b>	<b>3,174</b>	<b>53</b>	<b>2%</b>
<b>Total Expenses</b>	<b>166,246</b>	<b>156,577</b>	<b>190,215</b>	<b>99,019</b>	<b>110,784</b>	<b>156,879</b>	<b>46,095</b>	<b>24%</b>
<b>Net Profit (Loss)</b>	<b>\$ (166,246)</b>	<b>\$ (156,577)</b>	<b>\$ (190,215)</b>	<b>\$ (99,019)</b>	<b>\$ (110,784)</b>	<b>\$ (156,879)</b>	<b>\$ (46,095)</b>	<b>42%</b>

Public Education is included in the Member Services department shown on pages 6-8 and 11.

**Utah State Bar**  
**FY23 Draft Budget**  
**Based on Unaudited Actual Results through 3/31/22**  
**23 - Young Lawyers Division**

	Actual FY 2018	Actual FY 2019	Actual FY 2020	Actual FY 2021	Projected FY 2022	Draft Budget FY 2023	\$ Change 2022 Projected vs 2023 Budget	% Change 2022 Projected vs 2023 Budget
<b>Revenue</b>								
4052 - Meeting - Sponsor Revenue	2,250	590	-	-	-	-	-	#DIV/0!
4081 - CLE - Registrations	218	-	-	-	-	-	-	#DIV/0!
4095 - Miscellaneous Income	-	-	168	-	-	-	-	#DIV/0!
4200 - Seminar Profit/Loss	3,897	8,318	5,859	5,483	-	-	-	#DIV/0!
<b>Total Revenue</b>	<b>6,365</b>	<b>8,908</b>	<b>6,027</b>	<b>5,483</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>#DIV/0!</b>
<b>Expenses</b>								
<b>Program Services</b>								
5001 - Meeting Facility-external only	1,000	2,700	287	1,914	1,899	2,500	601	32%
5030 - Speaker Fees & Expenses	60	-	-	-	600	-	(600)	-100%
5031 - Speaker Reimb. - Receipt Req'd	-	-	-	-	-	-	-	#DIV/0!
5035 - Awards	1,841	-	973	2,382	3,229	1,000	(2,229)	-69%
5037 - Grants/ contributions - general	3,100	5,670	1,000	6,796	6,296	5,500	(796)	-13%
5060 - Program Special Activities	-	-	2,595	30	4,611	-	(4,611)	-100%
5062 - Law Day	900	900	-	-	-	900	900	#DIV/0!
5063 - Special Event Expense	2,979	2,285	3,992	60	1,153	3,500	2,347	204%
5064 - MCLE Fees Paid	-	-	-	-	236	-	-	0%
5070 - Equipment Rental	-	-	45	-	-	-	-	#DIV/0!
5075 - Food & Bev-external costs only	18,512	21,541	9,725	9,638	12,331	19,624	7,293	59%
5076 - Food & beverage - internal only	20	330	-	47	-	276	276	#DIV/0!
5085 - Misc. Program Expense	1,069	124	497	-	-	125	125	#DIV/0!
5095 - Wills for Heroes	1,676	450	482	360	434	1,250	816	188%
5702 - Travel - Lodging	7,046	6,190	1,628	-	502	6,200	5,698	1135%
5703 - Travel - Transportation/Parking	1,922	2,826	874	-	952	2,900	1,948	205%
5704 - Travel - Mileage Reimbursement	2,062	341	450	-	-	350	350	#DIV/0!
5705 - Travel - Per Diems	117	-	-	-	141	141	-	0%
5706 - Travel - Meals	675	936	109	-	-	900	900	#DIV/0!
5805 - ABA Annual Meeting	3,776	5,119	4,161	-	225	200	(25)	-11%
5810 - ABA Mid Year Meeting	4,263	3,033	2,105	100	100	3,500	3,400	3400%
5815 - Commission/Education	1,168	2,329	145	1,287	1,287	2,500	1,213	94%
5820 - ABA Annual Delegate	500	-	1,766	-	-	500	500	#DIV/0!
5855 - Bar Review	197	-	-	-	-	-	-	#DIV/0!
5865 - Retreat	3,072	-	-	-	-	3,300	3,300	#DIV/0!
<b>Total Program Services Expenses</b>	<b>56,196</b>	<b>54,854</b>	<b>30,995</b>	<b>22,615</b>	<b>33,996</b>	<b>55,402</b>	<b>21,406</b>	<b>69%</b>
<b>Salaries &amp; Benefits</b>								
5510 - Salaries/Wages	543	50	-	-	-	-	-	#DIV/0!
5605 - Payroll Taxes	47	4	-	-	-	-	-	#DIV/0!
5650 - Retirement Plan Contributions	54	-	-	-	-	-	-	#DIV/0!
5660 - Training/Development	190	-	-	-	-	-	-	#DIV/0!
<b>Total Salaries/Benefit Expenses</b>	<b>834</b>	<b>55</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>#DIV/0!</b>
<b>General &amp; Administrative</b>								
7025 - Office Supplies	31	378	-	-	-	200	200	#DIV/0!
7033 - Operating Meeting Supplies	-	-	-	-	-	-	-	#DIV/0!
7040 - Copy/Printing Expense	1,967	7	1,908	-	-	300	300	#DIV/0!
7045 - Internet Service	-	-	-	323	323	323	-	0%
7055 - Computer Supplies & Small Equip	612	-	-	-	-	-	-	#DIV/0!
7105 - Advertising	400	565	-	-	-	-	-	#DIV/0!
7110 - Publications/Subscriptions	198	881	1,165	193	-	1,000	1,000	#DIV/0!
7120 - Membership/Dues	146	-	150	275	408	275	(133)	-33%
7175 - O/S Consultants	-	-	-	-	-	-	-	#DIV/0!
7195 - Other Gen & Adm Expense	220	2,826	470	755	291	2,500	2,209	758%
<b>Total General &amp; Administrative Expenses</b>	<b>3,574</b>	<b>4,657</b>	<b>3,692</b>	<b>1,547</b>	<b>1,023</b>	<b>4,598</b>	<b>3,576</b>	<b>350%</b>
<b>Total Expenses</b>	<b>60,603</b>	<b>59,567</b>	<b>34,687</b>	<b>24,162</b>	<b>35,019</b>	<b>60,000</b>	<b>24,981</b>	<b>72%</b>
<b>Net Profit (Loss)</b>	<b>\$ (54,238)</b>	<b>\$ (50,659)</b>	<b>\$ (28,660)</b>	<b>\$ (18,679)</b>	<b>\$ (35,019)</b>	<b>\$ (60,000)</b>	<b>\$ (24,981)</b>	<b>71%</b>

Young Lawyers is included in the Member Services department shown on pages 6-8 and 11.



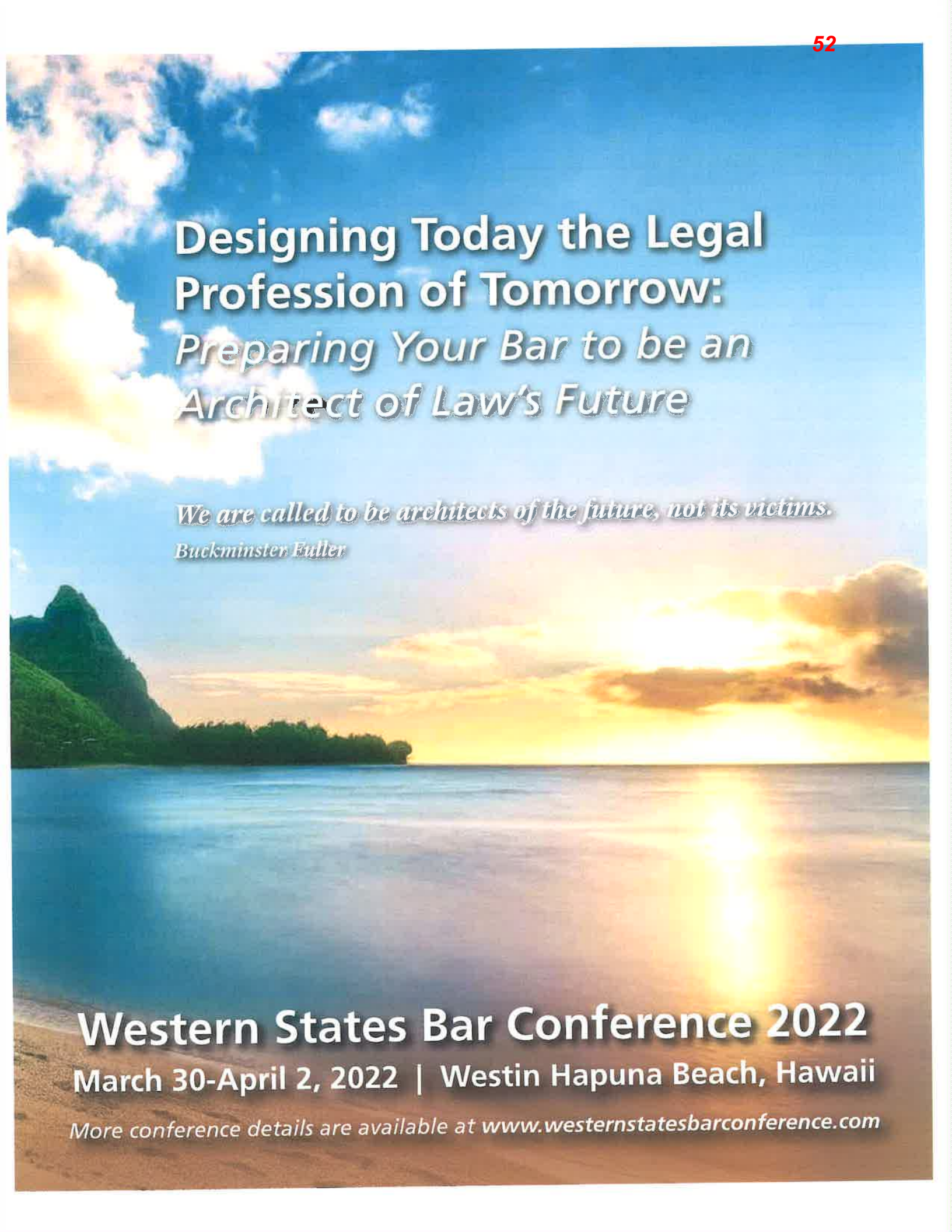
**Utah State Bar**  
**FY23 Draft Budget**  
**Based on Unaudited Actual Results through 3/31/22**  
**24 - Licensed Paralegal Practit**

	Actual FY 2018	Actual FY 2019	Actual FY 2020	Actual FY 2021	Projected FY 2022	Draft Budget FY 2023	\$ Change 2022 Projected vs 2023 Budget	% Change 2022 Projected vs 2023 Budget
<b>Revenue</b>								
4004 - Admissions - Laptop Fees	-	-	-	575	455	464	464	#DIV/0!
4011 - Admissions LPP	-	950	3,825	2,738	1,433	1,433	-	0%
4096 - Late Fees	-	-	-	100	-	-	-	#DIV/0!
<b>Total Revenue</b>	-	950	3,825	3,413	1,888	1,897	464	25%
<b>Expenses</b>								
<b>Program Services</b>								
5002 - Meeting facility-internal only	-	-	95	960	575	587	12	2%
5013 - ExamSoft	-	-	-	929	929	948	19	2%
5014 - Questions	36,700	-	-	35,210	26,417	26,417	-	0%
5076 - Food & beverage - internal only	-	-	-	-	45	46	1	2%
5703 - Travel - Transportation/Parking	528	-	-	-	57	57	-	0%
<b>Total Program Services Expenses</b>	37,228	-	95	37,099	28,024	28,055	31	33%
<b>Salaries &amp; Benefits</b>								
5510 - Salaries/Wages	8,827	20,186	39,108	47,656	38,818	30,144	(8,673)	-22%
5605 - Payroll Taxes	740	1,671	2,996	3,759	2,508	2,412	(96)	-4%
5610 - Health Insurance	-	-	-	3,999	3,076	3,000	(76)	-2%
5620 - Health Ins/Medical Reimb	-	-	-	1	1	1	0	5%
5630 - Dental Insurance	-	-	-	371	454	240	(214)	-47%
5640 - Life & LTD Insurance	-	-	-	351	471	200	(271)	-58%
5650 - Retirement Plan Contributions	35	1,556	1,388	3,352	3,783	1,472	(2,311)	-61%
5655 - Retirement Plan Fees & Costs	-	-	-	411	402	402	-	0%
5660 - Training/Development	-	-	-	-	574	603	29	5%
<b>Total Salaries/Benefit Expenses</b>	9,601	23,413	43,493	59,900	50,086	38,473	(11,613)	-23%
<b>General &amp; Administrative</b>								
7025 - Office Supplies	4	-	257	16	99	101	2	2%
7035 - Postage/Mailing, net	-	-	-	-	13	13	0	2%
7040 - Copy/Printing Expense	-	-	257	69	515	525	10	2%
7050 - Computer Maintenance	-	-	6,878	-	585	2,479	1,894	324%
7055 - Computer Supplies & Small Equip	-	-	-	-	203	213	10	5%
7100 - Telephone	-	-	404	1,156	1,121	1,121	-	0%
7110 - Publications/Subscriptions	-	-	-	129	207	211	4	2%
7120 - Membership/Dues	-	-	-	250	580	592	12	2%
7140 - Credit Card Merchant Fees	-	-	-	18	14	14	0	2%
7175 - O/S Consultants	-	-	1,468	2,110	1,776	-	(1,776)	-100%
7195 - Other Gen & Adm Expense	-	-	-	-	43	44	1	2%
<b>Total General &amp; Administrative Expenses</b>	4	-	-	3,749	5,155	5,312	157	3%
<b>Building Overhead</b>								
6015 - Janitorial Expense	-	-	66	147	242	250	7	3%
6020 - Heat	-	-	65	184	209	215	6	3%
6025 - Electricity	-	-	116	360	390	402	12	3%
6030 - Water/Sewer	-	-	18	54	54	55	2	3%
6035 - Outside Maintenance	-	-	83	122	160	165	5	3%
6040 - Building Repairs	-	-	63	155	197	203	6	3%
6045 - Bldg Mtncn Contracts	-	-	157	255	254	262	8	3%
6065 - Bldg Insurance/Fees	-	-	66	173	180	185	5	3%
6070 - Building & Improvements Depre	-	-	193	591	748	748	-	0%
6075 - Furniture & Fixtures Depre	-	-	31	39	38	38	-	0%
7065 - Computers, Equip & Sftwre Depre	-	-	506	794	563	563	-	0%
<b>Total Building Overhead Expenses</b>	-	-	1,364	2,872	3,035	3,086	51	2%
<b>Total Expenses</b>	46,837	23,413	54,215	103,621	86,300	74,926	(11,374)	-21%
<b>Net Profit (Loss)</b>	\$ (46,837)	\$ (22,463)	\$ (50,390)	\$ (100,208)	\$ (84,412)	\$ (73,029)	\$ 11,838	-14%

LPP is included in the Licensing department shown on pages 6-8.



# TAB 2



# Designing Today the Legal Profession of Tomorrow: *Preparing Your Bar to be an Architect of Law's Future*

*We are called to be architects of the future, not its victims.*  
*Buckminster Fuller*

## Western States Bar Conference 2022

March 30-April 2, 2022 | Westin Hapuna Beach, Hawaii

More conference details are available at [www.westernstatesbarconference.com](http://www.westernstatesbarconference.com)

## Welcome Attendees of the Western States Bar Conference



*Frank E. Stevenson*  
WSBC President 2021-2022

WSBC Members and Guests,

After a COVID-compelled two-year hiatus, we are all finally back together at the wonderful Westin Hapuna on the Big Island. Oregon State Bar's Chief Executive Officer Helen Hirschbiel, her Executive Assistant Cassandra Dyke, 2019-21 WSBC President Alex Vakula, and I hope you enjoy the programming and activities planned for our three days together. Most importantly, we hope you are ready to share ideas and insights with fellow bar leaders.

One purpose of these "welcome letters" is to comprehensively acquaint you with all the specific opportunities and activities available during your free time. So here you go:

**Howdy folks, we're in Hawaii!!!**

Done. Now, let me share what guided us in selecting the Conference's programming.

An "inflection point" is an event along the life span or trajectory of something resulting in profound change. Virtually anything can experience an inflection point — companies and countries; institutions and individuals. And the change that follows can be for the better — if the subject is prepared and adapts — or for the worse — if it's not and doesn't.

Could we find a sentient lawyer in America who'd dispute our profession is experiencing an inflection point? Doubtful. And if our profession is at an inflection point, then also our bars.

No single agent brought us here. Instead, they are numerous and varied, ranging from the massive to the microscopic: seismic challenges to our democracy and the Rule of Law; the pressing imperative for greater diversity, equity, and inclusion; woefully deficient access to justice; potentially far-reaching regulatory change; technology's burgeoning and consequential role; and COVID's fundamental and irreversible alterations.

Every one of these agents will be addressed during our Conference. We intend for these presentations, together with the even more critical exchange of ideas among our member bars, to help prepare and adapt us for the changes ahead. And by doing so, we hope these three days better ensure our bars are the architects of their future, not its victims.

Aloha, y'all.

Frank Stevenson  
2021-2022 WSBC President  
Past President, State Bar of Texas



*Alex Vakula*  
2019-2021 WSBC President

We all owe a great debt of gratitude to 2019-2021 WSBC President Alex Vakula who planned a superb Conference for us in Scottsdale, Arizona, that was canceled in 2020 and again in 2021 due to COVID. As mentioned above, Alex also graciously participated in planning this Conference — his third! Thank you, Alex.



## Conference Activities & Events

Please check the Westin Hapuna Beach Resort website for on-site amenities, restaurants, and other resort activities:  
[www.marriott.com/en-us/hotels/koawi-the-westin-hapuna-beach-resort/overview/](http://www.marriott.com/en-us/hotels/koawi-the-westin-hapuna-beach-resort/overview/)

### Pau Hana Sunset Cruise with the Whales

Thursday, March 31 | 4:00-6:30 p.m.

The biggest sunset party on the water, join us on a Pau Hana Sunset Cruise with the Whales! Enjoy the excitement of watching the whales while you sip on soft drinks, tropical juices, beer and wine, and munch on a variety of individually wrapped bar snacks.

Please meet in the lobby no later than 3:15 for your ride to Kawaihae Harbor. We plan to be back at Westin Hapuna at 7 p.m.



Westin Hapuna Beach (photo courtesy of Westin Hapuna)

### Mountain Thunder Coffee Plantation

Friday, April 1 | 2:00-3:15 p.m.

Mountain Thunder Coffee Plantation is a grower, processor, and roaster of 100% Kona Coffee. This means that we only sell coffee that has been grown in the Kona region of Hawaii Island. That is, our coffee is pure Kona Coffee and not mixed with beans from outside of Kona. Kona, Hawaii is a magical place where the perfect conditions—volcanic soil, high elevations, gentle climate and ideal rainfall—make for some of the world's best gourmet coffee. There are few places on earth that have such ideal conditions for coffee growing.

Please meet in the lobby no later than 1:15 p.m. for your 48 minute ride to the plantation. We plan to be back at Westin Hapuna at 4:15 p.m.

### Hapuna Golf Course

Organized by Tony Weiler

Friday, April 1 | 2:00-3:15 p.m.

The course, designed by Arnold Palmer, is within walking distance; please meet at the course.

## Conference Agenda

### Wednesday, March 30

7:00 a.m.-8:30 a.m.

*Ikena Landing*

**Bar Executives Breakfast**

Enjoy breakfast before the retreat (refreshments only in the meeting room)

9:00 a.m.-Noon

*Milo Room*

**Western States Bar Executives Retreat**

*Facilitator: Elizabeth Wright, Executive Director, Utah State Bar*

4:30-5:30 p.m.

*Breezeway*

**Registration**

6:00-7:30 p.m.

*Breezeway*

**Welcome Reception**

Check the WSBC website for more details: [www.westernstatesbarconference.com](http://www.westernstatesbarconference.com)

## Thursday, March 31

7:00-9:00 a.m. <i>Mauka Ballroom</i>	Breakfast
7:30-11:30 a.m. <i>Breezeway</i>	Registrations/Exhibitors
8:15-8:30 a.m. <i>Makai Ballroom</i>	<b>Welcome to the Conference</b> Frank E. Stevenson, Locke Lord LLP, WSBC President 2021-2022 Alex Vakula, Vakula Law Firm PLC, WSBC President 2019-2021
8:30-9:00 a.m. <i>Makai Ballroom</i>	<b>Opening Remarks and Welcome to Hapuna Beach, Hawaii</b> Daniel Akaka Jr., Kahu Hānai, Living Culture Department, Mauna Lani Auberge Resort Collections, Hawaii
9:00-9:10 a.m. <i>Makai Ballroom</i>	<b>Sponsor Welcome to Conference</b> ALPS, Chris Newbold LawPay, Jordan Turk
9:10-10:15 a.m. <i>Makai Ballroom</i>	<b>BLUEPRINT</b> Defending the Rule of Law: American Democracy in Peril In January 2021, the United States came closer to losing its democracy than at any time in its history. Although the guardrails of democracy held, the underlying threats to democracy remain. Why is American democracy in danger and what can we do to protect it? Erwin Chemerinsky, Dean and Jesse H. Choper Distinguished Professor of Law, University of California, Berkeley School of Law
10:15-10:30 a.m.	Transition Break
10:30 -11:45 a.m. <i>Makai Ballroom</i>	<b>BLUEPRINT</b> Addressing the Access to Justice Imperative: The Role of Regulatory Reform The exploration of regulatory reform as a method to improve access to justice is gaining traction across the country and continent, especially in states like California, Utah, and Arizona, as well as among prominent research institutions like the Institute for the Advancement of the American Legal System (IAALS) and the Stanford Center on the Legal Profession. It will also explore the role of national organizations in driving regulatory change through means such as the American Bar Association (ABA) Resolution 115 (Encouraging Regulatory Innovation) and the National Conference of Chief Justices Resolution 2 (Urging Consideration of Regulatory Innovations Regarding the Delivery of Legal Services). This program will discuss regulatory changes occurring in the western states and beyond and give participants an opportunity to discuss how state bars might work together to advance these innovations. Zachariah DeMeola, Director of Strategic Initiatives, Law School Admission Council Ellyn Rosen, Regulation and Global Initiatives Counsel, American Bar Association (ABA) Moderator: Leah Wilson, Executive Director, State Bar of California
11:45 a.m.-12:15 p.m. <i>Makai Ballroom</i>	Roll Call of States: <i>Idaho, South Dakota, Alaska, Hawaii</i>

LUNCH ON OWN

*Optional Afternoon Event: Whale Watching*

DINNER ON OWN



## Friday, April 1

7:00-9:00 a.m.  
*Mauka Ballroom*

Breakfast

8:15-8:30 a.m.  
*Makai Ballroom*

Update from the ABA

Deborah Enix-Ross, Debevoise & Plimpton, ABA President-Elect

8:30-9:00 a.m.  
*Makai Ballroom*

Roll Call of States: **Arizona, Oregon, Texas**

9:00-9:15 a.m.

Transition Break

9:15-10:30 a.m.  
*Makai Ballroom*

**BLUEPRINT** Leadership Development: How Bar Leaders Today Build Diversity, Equity, and Inclusion to Create Better Outcomes Tomorrow

It's not enough to just affirm the singular importance of diversity, equity, and inclusion; we must equip ourselves to effectively lead our bar associations as they grow increasingly diverse in the broadest sense. While this session will discuss the challenges that bar associations face as they work to create more inclusive environments, the focus will primarily be on practical ideas about what bar associations can do to move beyond superficial diversity to become more inclusive. The session will include interactive exercises, measures that bar associations have already implemented, and some concrete actions that can be taken going forward to increase membership and prepare future leaders

**Stephen Rispoli**, Assistant Dean of Student Affairs and Strategic Initiatives/  
Director of Innovation and Scholarship, Baylor University School of Law

**Patricia Wilson**, Associate Dean and Professor of Law, Baylor University School of Law

10:30-10:45 a.m.

Transition Break

10:45-11:45 a.m.  
*Makai Ballroom*

**BLUEPRINT** Thriving After COVID-19: The Silver Lining of Change

COVID-19 has changed so much. The legal environment is no exception. For the unwary or those who resisted change, the crisis may have come as a devastating blow. But this pandemic has also bred new strategies, shifted the playing field to open doors, and created previously unseen opportunities for success across our profession. Some of these changes now serve as the blueprint for our future. In this session we will address both the changes and the opportunities that COVID has brought to the court system, to the way we communicate to our clients and our staff and how it has redefined our culture at our law offices and our bar offices.

**Eric Farber**, Creators Legal CEO; Pacific Workers CEO

**Hon. Robert D.S. Kim**, Chief Judge, Circuit Court of the Third Circuit (Kona)

**Patrick Palace**, Palace Law Owner, Palace Personal Injury Law Group Owner

**Moderator: Ann Morgan**, Director, Fennemore Craig PC

11:45 a.m.-12:15 p.m.  
*Makai Ballroom*

Roll Call of States: **Utah, Nevada, Washington, New Mexico**

LUNCH ON OWN

*Optional Afternoon Events: Golf/Kona Coffee Tour*

6:00-9:00 p.m.  
*Breezeway*

Reception/Dinner

Dinner starts at 7:00 p.m.

## Saturday, April 2

7:00-9:00 a.m.

*Mauka Ballroom*

Breakfast

8:15-9:15 a.m.

*Milo Room*

*Hau/Lehua*

Breakout Sessions for Bar Leaders

*Large Bar Moderator: Joel England, CEO/Executive Director, State Bar of Arizona*

*Small Bar Moderator: Tony Weiler, Executive Director, State Bar of North Dakota*

9:15-9:45 a.m.

*Makai Ballroom*

Roll Call of States: **Wyoming, North Dakota, Montana, California**

9:45-10:00 a.m.

Transition Break

10:00-11:00 a.m.

*Makai Ballroom*

**BLUEPRINT** A View Behind the Curtain: Increasing Technology Competency by Learning How to Code

Technology permeates nearly every aspect of law practice and the justice system. With so much technology offering so many solutions to help lawyers, self-represented parties, and the courts, it is tempting to just trust the algorithms. But the rules of professional conduct require competence when it comes to using technology in the practice of law. Computers are fallible and in order to maintain technological competency, lawyers need to know when to trust the results and when to ask questions. During the first part of this session, we will build our own algorithm using real code. In the second half, we will discuss the limitations of our new software and the ethical considerations around its use by attorneys and clients. Please bring your laptop so you can code along with the speaker. No prior knowledge of coding or computer skills are necessary

**Matthew Stubenberg**, Associate Director of Legal Technology – A2J Lab, Harvard Law School; Adjunct Professor, University of Hawaii at Manoa, William S. Richardson School of Law

11:00-Noon

*Milo Room*

Deeper Dive into **BLUEPRINTS**

1. Leadership Skills Today to Build More Inclusive Bars Tomorrow

Culture within an organization is built upon leaders who are intentionally inclusive. These leaders seek to create an atmosphere that encourages relationship and collaboration, and they implement inclusive policies and the procedures necessary to support them. Building upon the first session's discussion, this highly-interactive session will include exercises to get participants thinking, a detailed discussion of the steps that can be taken to implement an inclusive culture, and facilitated breakout groups to help participants share information and brainstorm implementation ideas that participants can add to their leadership toolkit.

**Stephen Rispoli**, Assistant Dean of Student Affairs and Strategic Initiatives/Director of Innovation and Scholarship, Baylor University School of Law

**Patricia Wilson**, Associate Dean and Professor of Law, Baylor University School of Law

*Makai Ballroom*

2. The Role of Bars in Driving Regulatory Change

Building upon the first session, this session will provide an opportunity for participants to engage in deeper discussion about the role of bar organizations in driving regulatory reform. We will brainstorm different approaches for advancing innovation and explore opportunities for collaboration across jurisdictions.

**Leah Wilson**, Executive Director, State Bar of California

**Lucy Ricca**, Director of Policy and Programs, Center on the Legal Profession, Stanford Law School

Noon-12:15 p.m.

*Makai Ballroom*

Conclusion of Conference (*Announcement of New Leadership*)

12:15-12:30 p.m.

Annual Business Meeting (*for WSBC Leadership*)



## WSBC HISTORY

### Western States Bar Conference Presidents

Harry J. McClean, California.....1949-1951	David K. Robinson, California .....1974-1975	Timothy J. Kirven, Wyoming.....1998-1999
Alfred Pence, Wyoming .....1951-1952	Jerry V. Smith, Idaho .....1975-1976	Steven T. Walther, Nevada .....1999-2000
Robert A. Leedy, Oregon .....1952-1953	Henry Loble, Montana .....1976-1977	Dennis C. Karnopp, Oregon.....2000-2001
Thomas M. Robertson, Idaho .....1953-1954	Joseph Novak, Utah .....1977-1978	Reed L. Martineau, Utah .....2001-2002
John Shaw Field, Nevada.....1954-1955	Mark I. Harrison, Arizona .....1978-1979	Hod Greeley, Hawaii.....2002-2003
H. Cleveland Hall, Montana .....1955-1956	Leo J. Puccinelli, Nevada.....1979-1980	Don Bivens, Arizona .....2003-2004
Walter E. Craig, Arizona.....1956-1957	James R. Crouch, New Mexico .....1980-1981	Carl E. Olsson, Idaho .....2004-2005
William H. Robinson, Colorado .....1957-1958	David D. Hoff, Washington.....1981-1982	Dale Carlisle, Washington .....2005-2006
A.H. Nebeker, Utah .....1958-1959	Jon R. Kerian, North Dakota.....1982-1983	Andrew Suenram, Montana .....2006-2007
H.B. Kidwell, Hawaii .....1959-1960	Donna C. Willard, Alaska .....1983-1984	Thomas Fritz, South Dakota .....2007-2008
Glenn R. Jack, Oregon.....1960-1961	Dwight M. Rush, Hawaii .....1984-1985	Daniel J. O'Brien, New Mexico .....2008-2009
Joseph H. Gordon, Washington.....1961-1962	Thomas S. Smith, Wyoming.....1985-1986	Eduardo Rodriguez, Texas .....2009-2010
William Gaunt, Colorado .....1962-1963	Charles W. Deaner, Nevada .....1986-1987	John J. Tiemessen, Alaska .....2010-2011
Jess R. Nelson, New Mexico.....1963-1964	John J. Haugh, Oregon.....1987-1988	David S. Maring, North Dakota .....2011-2012
Roy A. Bronson, California .....1964-1965	O. Wood Moyle III, Utah.....1988-1989	Nathan D. Alder, Utah .....2012-2013
Gilbert B. St. Clair, Idaho .....1965-1966	John J. Bouma, Arizona .....1989-1990	Salvador A. Mungia, Washington....2013-2014
Herbert H. Anderson, Oregon .....1966-1967	Richard C. Fields, Idaho .....1990-1991	Mitzi M. Naucier, Oregon.....2014-2015
Elmer J. Scott, Wyoming.....1967-1968	Robert R. Redman, Washington ....1991-1992	Molly O'Leary, Idaho.....2015-2016
John Gavin, Washington.....1968-1969	Burke M. Critchfield, California.....1992-1993	Eric E. Jones, Wyoming.....2016-2017
Ray R. Christensen, Utah .....1969-1970	Damon Gannett, Montana.....1993-1994	Andrew J. (Drew) Cloutier,
Edward L. Benoit, Idaho .....1970-1971	Richard F. Rowley II, New Mexico ..1994-1995	New Mexico .....2017-2018
John Joe Wilkinson, Colorado .....1971-1972	Kermit Edward Bye, North Dakota ..1995-1996	Pamela Reiter, Hawaii.....2018-2019
John Huneke, Washington .....1972-1973	Wiley Y. Daniel, Colorado .....1996-1997	Alex Vakula, Arizona.....2019-2021
John U. Yerkovich, Oregon.....1973-1974	Daniel E. Winfree, Alaska.....1997-1998	Frank Stevenson, Texas .....2021-2022

### Secretaries / Treasurers

Leland M. Cummings, Utah .....1946-1954	Celene Greene, New Mexico	Diane K. Minnich, Idaho .....2001-2005
John H. Holloway, Oregon .....1954-1961	and Minnesota.....1979-1983	Allen Kimbrough, Nevada.....2005-2006
Alice Ralls, Washington.....1961-1966	Robert J. Elfers, Oregon .....1983-1985	Diane K. Minnich, Idaho .....2006-2007
Dean W. Sheffield, Utah.....1966-1971	Celene Greene, Oregon .....1985-1986	Kimberly Farmer, Nevada .....2007-2010
Eldon L. Husted, Arizona.....1971-1973	Bruce Hamilton, Arizona .....1986-1991	Joe Conte, New Mexico .....2011-2015
G. Edward Friar, Washington.....1973-1974	Linda L. McDonald, New Mexico	Paula C. Littlewood, Washington ...2016-2019
Ronald L. Kull, Idaho.....1974-1978	and Texas.....1991-1996	Helen Hierschbiel, Oregon.....2019-2023
Eldon L. Husted, Arizona.....1978-1979	Charles C. Turner, Colorado .....1996-2000	

### Western State Bar Conference Meeting Sites

San Francisco .....1949	Guadalajara, Mexico .....1967	San Diego .....1985	Kaua'i.....2003
Salt Lake City .....1950	Coronado.....1968	Waikoloa.....1986	Scottsdale .....2004
Denver .....1951	Maui.....1969	San Antonio.....1987	Maui .....2005
Portland .....1952	Colorado Springs .....1970	Kaua'i.....1988	San Diego .....2006
Reno.....1953	Scottsdale .....1971	Monterey .....1989	Kohala Coast .....2007
Sun Valley .....1954	Albuquerque .....1972	Waikoloa.....1990	Tucson .....2008
Phoenix.....1955	Vancouver, B.C.....1973	Santa Barbara .....1991	Turtle Bay, Oahu .....2009
Cheyenne.....1956	Guadalajara, Mexico .....1974	Maui .....1992	San Antonio.....2010
Santa Fe .....1957	Monterey .....1975	Carmel .....1993	Maui .....2011
San Francisco .....1958	Palm Springs .....1976	Maui.....1994	Las Vegas .....2012
Salt Lake City .....1959	Maui .....1977	San Diego .....1995	Kaua'i.....2013
Honolulu.....1960	Scottsdale .....1978	Kaua'i.....1996	Palm Desert.....2014
Seattle .....1961	San Diego .....1979	Scottsdale .....1997	Kohala Coast .....2015
Denver .....1962	Acapulco, Mexico.....1980	Waikoloa.....1998	San Diego .....2016
Phoenix.....1963	Tucson .....1981	San Diego .....1999	Maui .....2017
Reno.....1964	Maui .....1982	Maui.....2000	Santa Barbara .....2018
Monterey .....1965	St. Thomas, Virgin Islands.1983	Waikoloa.....2001	Kaua'i.....2019
Las Vegas .....1966	Kaua'i.....1984	Las Vegas .....2002	Event Cancelled.....2020-2021

## Thank you to our Sponsors

### Platinum Sponsor



### Silver Sponsors



### Supporting Sponsors



Join us next year at the  
Hyatt Mission Bay in San Diego, March 29-April 1, 2023





## Summary of Bar Commission Reimbursement Policies

### 1. Commission Meetings.

- (a) **Mileage or airfare**, if necessary, for distant meetings – if they are held far enough from your office to make reimbursement appropriate (i.e., travel from Logan, St. George, or Provo to Salt Lake City, or *vice versa*), and;
- (b) **Lodging** for those who must travel some distance (i.e., travel from Logan, St. George to meetings in Salt Lake City, etc.).

### 2. Commission Meetings held at Spring Convention.

- (a) **Mileage** plus tolls and parking or, **reasonable airfare**;
- (b) **Standard per diem** for two day's meals, incidentals, and gratuities;
- (c) **Two night's lodging in a standard room** in the convention hotel, and;
- (d) **Rental car**, if necessary.

### 3. Commission Meetings held at Summer Convention.

- (a) **Mileage** plus tolls and parking or, **reasonable airfare**;
- (b) **Standard per diem** for three day's meals, incidentals, and gratuities;
- (c) **Three night's lodging in a standard room** in the convention hotel, and;
- (d) **Rental car**, if necessary.

### 4. Worthwhile Educational Opportunities.

At the discretion of the Bar President and pursuant to approved travel budgets:

- (a) **Mileage** plus tolls and parking or, **reasonable airfare**;
- (b) **Meals, incidentals, and gratuities** while traveling to and at the event;
- (c) **Lodging at the event hotel**, and;
- (d) **Rental car**, if necessary.

### 5. Other General Office Expenses.

With the advance approval of the Bar President:

- (a) **Telephone, postage, supplies, copying**, and other similar expenses, but *not* expenses for secretarial or clerical assistance.

### 6. Procedures for Receiving Reimbursement.

- (a) **Spring and Summer Convention.** Reimbursement for Commission Meetings held at the Spring and Summer Conventions will be solicited by the Bar's Executive Secretary via e-mail immediately after the conventions. Commissioners indicating a desire for reimbursement will be reimbursed for lodging, per diem, and mileage at standard rates.
- (b) **Reimbursement for other travel** will require supporting documentation.



# TAB 3

## UTAH STATE BAR AWARDS COMMITTEE AWARD RECOMMENDATION

**TO:** Utah State Bar Commission

**DATE:** May 26, 2022

**RE:** AWARD RECOMMENDATION – LAWYER OF THE YEAR

**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>
Robert S. Clark <i>No prior award.</i>	Jeffrey Hunt	Yes
Kevin Daniels <i>No prior award.</i>	Anonymous	No
Kristen L. Fadel <i>No prior award</i>	Kelli Larson	Yes
Debra M. Nelson <i>NLTP Mentor</i>	Wendy Brown	Yes
	Benjamin Miller	Yes
Noella A. Sudbury <i>No prior award</i>	Jenifer Tomchak	Yes

**PAST RECIPIENTS AND NOMINEES:**

<b>Past Recipients</b>	<b>Other Nominations That Year</b>
2021 Joni J. Jones	Wally Bugden, Richard Burbidge, Abby Dizon-Maughan, Rick Haderlie, George Hofmann, Andrew Morse, V. Lowry Snow, Ann Marie Taliaferro, Christopher Von Maack
2020 James W. McConkie II	Doug Farr, Elizabeth (Terry) Dunning, Brad Parker, Jonathan Peck, Lauren Scholnick, Margaret Plane, Michael Liechty, Richard Mauro
2019 Paul C. Burke	Ross C. Anderson, Peter W. Billings, Patricia Christensen, Susan Griffith, John Huber, Gary Johnson, Anthony Plachy
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

**RECOMMENDATION: Laura M. Gray \***

- \* Laura M. Gray was nominated for an award in the “Special Service Award” category. The Award Committee felt Ms. Gray’s nomination would be more appropriate for “Lawyer of the Year.”

**From:** [WordPress](#)  
**To:** [Christy Abad](#)  
**Subject:** New submission from Nomination Bar Awards  
**Date:** Monday, April 25, 2022 2:53:02 PM

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<b>Nominator Name</b>
<div></div>
Utah State Bar Member
<b>Nominee's Name</b>
Laura Gray
Special Service Award (When Warranted)
<p>I nominate Laura Gray for a special service award for her actions that were instrumental in bringing to justice Calvin Curtis, a now disbarred estate and trust attorney who stole many millions of dollars (approx. \$13 Million) from clients for whom he was serving as a fiduciary (such as trustee, guardian, conservator) most of whom suffered from disabilities. Laura's actions in trying obtain information to help the victim with the single largest loss led to Mr. Curtis being removed from fiduciary positions and to his pleading guilty in federal court to felony charges (sentencing is pending), and to a large stipulated civil judgment against him. Mr. Curtis severely damaged the reputation of lawyers in Utah, particularly estate and trust lawyers, but Laura has helped rehabilitate that reputation by her conduct, much of it pro-bono. She had the assistance of of Deborah Chandler who also has worked hard, much of it pro-bono. Laura was the driving force that allowed her team to accomplish justice when Mr. Curtis felt the need to confess his crimes to defense counsel Greg Skourdas. She was also able to reestablish a disabled clients grand daughter as a beneficiary after Mr. Curtis had the grand daughter removed as a beneficiary during a time his then client Ms. Glenn McConkey was clearly without capacity. I believe Laura has acted in the best traditions of the Bar in bringing to justice one of our Bar's worst members.</p>
<b>Please select one:</b>
<p>My nomination is private and should not be shared with the nominee or published, whole or in part, by the Utah State Bar.</p>
<b>Nominator Name</b>
<div></div>

Bar Number
<div></div>
Email address
<div></div>
Date

# TAB 4



**UTAH STATE BAR AWARDS COMMITTEE  
AWARD RECOMMENDATION**

**TO:** Utah State Bar Commission

**DATE:** May 26, 2022

**RE:** AWARD RECOMMENDATION – JUDGE OF THE YEAR

**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. Patrick W. Corum <i>No prior award.</i>	Rex Bush	Yes
Hon. Angela F. Fannesbeck <i>No prior award.</i>	Jen Tomchak	Yes
Hon. Ryan M. Harris <i>No prior award.</i>	McKay Lewis	Yes
Hon. Constandinos G. Himonas <i>No prior award.</i>	Anonymous	No
Hon. Noel S. Hyde <i>No prior award.</i>	Garrett Smith	Yes
Hon. Derek Pullan <i>No prior award.</i>	Tyler Young	Yes
Hon. Laura S. Scott 2013 Professionalism 2020 James B. Lee	Anonymous	No
	Hon. Michele Christiansen Forster	Yes
	Camille Neider	Yes

**PAST RECIPIENTS AND NOMINEES:**

Past Recipients	Other Nominations That Year
2021 Hon. Brendan P. McCullagh	Hon. David Hamilton, Hon. Dee Benson, Hon. Douglas Nielsen, Hon. James Blanche, Hon. Kate Appleby, Hon. Laura Scott, Hon. Noel Hyde, Hon. Royal Hansen, Hon. Constandinos Himonas, Hon. Thomas Kay
2020 Hon. Kate Appleby	Hon. David Hamilton, Hon. Douglas Nielsen, Hon. James Blanche, Hon. Laura Scott, Hon. Noel Hyde, Hon. Royal Hansen, Hon. Constandinos, Himonas, Hon. Thomas Kay
2019 Hon. John Baxter	Hon. James Gardner, Hon. Diana Hagen Hon. Kimberly Hornak, Hon. Thomas Kay, Hon. Eric Ludlow, Hon. David Nuffer, Hon. Paul M. Warner, Hon. Brooke Wells, Hon. Jeffrey C. Wilcox
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

**RECOMMENDATION:** **Hon. Laura S. Scott**

**Christy Abad**

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**From:** WordPress <Nominations@utahbar.org>  
**Sent:** Thursday, May 19, 2022 12:54 PM  
**To:** Christy Abad  
**Subject:** New submission from Nomination Bar Awards

**Nominator Name**

Utah State Bar Member

**Nominee's Name**

Laura Scott

Judge of the Year (Summer Convention)

Judge Scott is an exemplary judge who has served this State with incredible integrity and independence. She is highly respectful to all who come before her in court and presides without bias or partisan or personal interest. Everyone in her court is treated fairly. However, she does not suffer fools or those who disrespect the law, the institution of the Court, or the rules of procedure and ethics. She is extremely knowledgeable of the law and if there is an area she is not familiar with, she learns it. In her work in Drug Court, she has endeavored to improve the administration of justice to all participants. She is a stellar judge and deserves this recognition.

**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****Bar Number****Email address**

**Christy Abad**

---

**From:** WordPress <Nominations@utahbar.org>  
**Sent:** Friday, May 20, 2022 12:25 PM  
**To:** Christy Abad  
**Subject:** New submission from Nomination Bar Awards

**Nominator Name**

Michele Christiansen Forster

Utah State Bar Member

**Nominee's Name**

Laura Scott

Judge of the Year (Summer Convention)

Judge Laura S. Scott exemplifies excellence and professionalism and is an incredible asset to the entire court system. Judge Scott has served for several years as the Associate Presiding Judge of Third District and through her leadership, flexibility, and innovation, helped put in place online jury selection and virtual hearings during the pandemic. During a challenging time, Judge Scott continued to expedite the resolution of cases and provide access to the public in a way that improved confidence in the judicial system.

As her JPEC scores and her well-reasoned decisions demonstrate, Judge Scott is patient, prepared, thorough, and knowledgeable of the law. She cares deeply about all who appear before her and understands that the legitimacy of our courts requires judges who listen and who approach decision making in a fair and impartial manner. Judge Scott runs her courtroom in a professional, yet personable, manner. She asks good questions, provides timely and thorough rulings, and genuinely cares about getting the right answer. We should recognize and celebrate Judge Scott who left her practice as a commercial litigator and as a member of her law firm's board of directors for the world of public service and who applied to the bench because she perceived a need for diversity and recognized that she needed to risk rejection and not just pay lip-service to the effort to diversify our benches.

Judge Scott is dedicated to the fair administration of justice in our courts. For example, Judge Scott presided over one of the Third District's drug courts for several years. She was committed to serving the participants and took the time to learn about and encourage participants to succeed in overcoming their addictions. Judge Scott has also served as a probate judge and is currently overseeing a general water rights adjudication which is a huge undertaking and has taken a tremendous amount of time in addition to her heavy caseload.

Finally, I do not believe I know anyone else who does more to support, promote, and educate younger lawyers in this community. Judge Scott is an American Bar Foundation Fellow, serves as the judicial advisor to Women

Lawyers of Utah, is on the Salt Lake County Bar Association, the Advisory Committee on the Utah Rules of Civil Procedure, the Ethics Advisory Committee, and the Judicial Outreach Committee. She previously served as the vice chair of the Supreme Court's Ethics and Discipline Committee.

**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**

Michele Christiansen Fortser

**Bar Number**

7259

**Email address**

[mmchristiansen@utcourts.gov](mailto:mmchristiansen@utcourts.gov)

**Date**

5/20/2022

**Christy Abad**

**From:** WordPress <Nominations@utahbar.org>  
**Sent:** Monday, May 23, 2022 10:47 AM  
**To:** Christy Abad  
**Subject:** New submission from Nomination Bar Awards

**Nominator Name**

Camille Neider

Utah State Bar Member

**Nominee's Name**

Judge Laura Scott

Judge of the Year (Summer Convention)

Judge Laura Scott exemplifies all the things listed in the criteria for this award. I am a much newer judge than Judge Scott and I have been so impressed at her ability to serve as an example and mentor all the newer judges. Judge Scott has provided countless hours of help, training and guidance for all of those coming behind her. For her, the influence is not confined to her building or district but traverses the whole state and each district. Judge Scott routinely presents at the New Judge Orientation, has presented at several judge trainings, and routinely reaches out to new judges with offers of assistance and help. I know that she is also the Assoc. Presiding Judge for the Third District and has made significant contribution to the changes necessary to survive COVID and to keep the judiciary moving forward. Judge Scott's contributions to virtual jury selection and other areas have been a monumental benefit for the entire state. I can imagine there are other significant influences, changes and ideas that have come from Judge Scott that I am not even aware of. Judge Scott is not one to take credit for any influence or change -- she simply shows up to every meeting, volunteers to lead or contribute, offers support in any way she can, gives credit to others and is gracious with everyone. All these things are on top of managing her own case load and courtroom with the same skills and attention. I know that she also makes those same kinds of contributions to her staff, the practitioners, the bar membership, aspiring lawyers and judges, the litigants before her and the public in general. Judge Scott is an example to all the judges in the state and I know that her work ethic, patience and temperament is one that all of us should aspire to.

**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.



# TAB 5

## UTAH STATE BAR AWARDS COMMITTEE AWARD RECOMMENDATION

**TO:** Utah State Bar Commission

**DATE:** May 26, 2022

**RE:** AWARD RECOMMENDATION – SECTION OF THE YEAR

**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:**

<u>NOMINEE</u>	<u>NOMINATOR</u>	<u>PUBLIC?</u>
Appellate Practice Section	Emily Adams	Yes
Business Law Section		No

**PAST RECIPIENTS AND NOMINEES:**

Past Recipients	Other Nominations That Year
2021 Intellectual Property Section	
2020 Indian Law Section	Litigation Section
2019 Litigation Section	
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	

**RECOMMENDATION:** Business Law Section

**Christy Abad**

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**From:** WordPress <Nominations@utahbar.org>  
**Sent:** Thursday, May 19, 2022 12:18 PM  
**To:** Christy Abad  
**Subject:** New submission from Nomination Bar Awards

**Nominator Name**

Utah State Bar Section

**Nominee's Name**

Business Section

Section of the Year Award (Summer Convention)

This past year the business section has made focused efforts to educate and connect the community to the resources available through business attorneys. They redesigned their website to give easy access to a section written treatise on various aspects of Utah Business Law and also made CLE recordings more searchable to other attorneys and the public. They also worked towards a collaboration between the University of Utah and BYU Law schools to harmonize the corporate code (which was approved but is now on hold because of a change in leadership at BYU where the sponsoring professor was brought into University leadership).

**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****Bar Number****Email address**

# TAB 6

# UTAH STATE BAR AWARDS COMMITTEE AWARD RECOMMENDATION

**TO:** Utah State Bar Commission

**DATE:** May 26, 2022

**RE:** AWARD RECOMMENDATION – COMMITTEE OF THE YEAR

**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:**

NOMINEE

NOMINATOR

PUBLIC?

None

**PAST RECIPIENTS AND NOMINEES:**

Past Recipients	Other Nominations That Year
2021 Governmental Relations Committee	
2020 CLE Advisory Committee	
2019 Bar Journal Committee	
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	

**RECOMMENDATION:** Licensed Paralegal Practitioner Committee



**TAB**  
**7**

## UTAH STATE BAR AWARDS COMMITTEE AWARD RECOMMENDATION

**TO:** Utah State Bar Commission

**DATE:** May 26, 2022

**RE:** AWARD RECOMMENDATION –  
SPECIAL/DISTINGUISHED SERVICE AWARD

**CRITERIA:**

The Special/Distinguished Service Award has no specific criteria. The Award is given by the Utah State Bar Board of Bar Commissioners to recognize distinguished service to Utah State Bar or the Utah legal community and is presented to individuals who have notable Bar activity and significant professional accomplishments, including private interests, family interests, acts of heroism, charitable acts, or social accomplishments. Past recipients have given long and/or useful service to the Utah State Bar, either paid or as a volunteer.

**NOMINEES:**

<u>NOMINEE</u>	<u>NOMINATOR</u>	<u>PUBLIC?</u>
Noella A. Sudbury <i>No prior award</i>	Jenifer Tomchak	Yes

**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
2019	ROBERT W. ADLER
	STEVEN G. JOHNSON
2020	RICHARD MAURO & SALT LAKE LEGAL DEFENDER ASSOC

**RECOMMENDATION:** Noella A. Sudbury \*

\* Noella A. Sudbury was nominated for an award in the “Lawyer of the Year Award” category. The Award Committee felt Ms. Sudbury’s nomination would be more appropriate for “Special/Distinguished Service.”

## Christy Abad

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**From:** WordPress <Nominations@utahbar.org>  
**Sent:** Thursday, May 19, 2022 11:46 PM  
**To:** Christy Abad  
**Subject:** New submission from Nomination Bar Awards

### Nominator Name

Jenifer Tomchak

Utah State Bar Member

### Nominee's Name

Noella Sudbury

Judge of the Year (Summer Convention)

The Women Lawyers of Utah is pleased to nominate Noella Sudbury as the 2022 Lawyer of the Year Award. Ms. Sudbury has focused her career on increasing access to justice. She is a former public defender. She was appointed by Mayor Ben McAdams and the Salt Lake County Council as the Director of the County's Criminal Justice Advisory Council and later joined the Mayor's cabinet as a Senior Policy Advisor on Criminal Justice. She worked tirelessly in 2019 to ensure the passage of HB 431, Utah Clean Slate Law, which historic law is the second of its kind in the nation to automate the criminal record expungement process for misdemeanor offenses. This law is expected to help over \$200,000 clean their records.

Noella also put on the first statewide Expungement Day, a statewide effort to streamline the expungement process and expunge the records of as many people as possible in a single day. As a result of these efforts, over 200 participants (and counting) have better housing opportunities, jobs and wages.

She founded Clean Slate Utah, a non-profit organization that helps make it simple and affordable for people to clear their criminal records and access opportunities. In its first year, she raised nearly \$500,000, while serving part-time as the organization's founder and executive director, pro bono. She is also launching a similar organization, Rasa, which focuses on helping expunge the records of millions of people who are not eligible for automatic expungement. Clean Slate Utah has committed to provide some percentage of free legal services to individuals who are 200% below the FPL.

For these efforts, she has been recognized by Utah Business Magazine as the 2019 Woman of the Year, by the University of Utah College of Law's 2018 Young Alumna of the Year, and the Unified Police Department of Greater Salt Lake's 2018 Citizen Service Award.

Noella has served on the National Clean Slate Initiative Steering Committee, and she has worked on Clean Slate campaigns in more than a half dozen states.

She is especially deserving of this award this year because of the work she has done as the executive of Clean Slate Utah and Rasa. The Clean Slate Law went into effect in March.  
Thank you for your time and consideration of this nomination.

**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**

Jenifer Tomchak

**Bar Number**

10127

**Email address**

[jen.tomchak@tomchaklaw.com](mailto:jen.tomchak@tomchaklaw.com)

**Date**

5/19/2022

# TAB

## 8



# UTAH STATE BAR COMMISSION MEETING

## MINUTES

Friday, April 22, 2022

## ZOOM AND IN-PERSON MEETING

### AGENDA

**In Attendance:** President Heather Thuet, President-Elect Kristin “Katie” Woods, and Commissioners John Bradley, Traci Gunderson, Rick Hoffman, Greg Hoole, Marty Moore, Andrew Morse, Shawn Newell, Michelle Quist, and Tyler Young.

**Ex-Officio Members:** Past-President Heather Farnsworth, Erik Christiansen, Kim Cordova, Beth Kennedy (for Kim Neville), Brandon J. Mark, Grant Miller, Margaret Plane, Nick Stiles, Dean Elizabeth Kronk-Warner, and Tonya Wright,

**Not in Attendance:** Commissioners Chrystal Mancuso-Smith and Mark Morris. Ex Officio members Nate Alder, Dean Gordon Smith, J. Ramzi Hamady, and Camila Moreno.

**Also in Attendance:** Executive Director Elizabeth A. Wright, General Counsel Nancy J. Sylvester, Stewart Ralphs, Anne Milne, Adina Zahradrikova, Mark Baier, George Sutton, Marcus Degen, John Lund.

### 1. President’s Report: Heather Thuet

#### 1.1 Bar President-elect & Commission Election Results

Erik Christiansen, President-elect. Matt Hansen, Second Division Commissioner. Beth Kennedy and Cara Tangaro, Third Division Commissioners. Tom Bayles, Fifth Division Commissioner.

#### 1.2 Law Day Luncheon – May 6, 2022

There are still 4 spots available for the table.

## 2. Action Items:

### 2.1 Donation to James B. Lee Justice Center: Anne Milne-ULS, and Stewart Ralphs-Legal Aid, Adina Zahradnikova-Disability Law Center

Mr. Ralphs discussed why And Justice for All is requesting a donation for their new building. He gave some history on the Bar's donations to AJFA, the last of which was \$100,000. The capital campaign has worked on raising \$3.6 million. There is \$1.3 million left to go. The Family Law Section donated \$50,000. Katie Woods moved to approve donating \$200,000 to the capital campaign. John Bradley seconded the motion. Traci Gunderson moved to amend the motion to \$250,000. Ms. Woods and Mr. Bradley accepted the amendment. The motion carried with one dissenting vote.

### 2.2 Supreme Court Office of Legal Services Innovation: Nick Stiles and John Lund

Mr. Stiles and Mr. Lund introduced the idea of funding the Innovation Office at the Bar on behalf of the Supreme Court. If the Council funds the Innovation Office with one-time funding, it will be funded to June 30, 2024. Mr. Lund spoke of economy of scale in housing the Innovation Office at the Bar. This is not an immediate ask, but the conversations about how it could happen need to be had. Mr. Lund noted that Utah has been a leader in access to justice initiatives nationwide for quite some time. Mr. Lund said he believes the Court sees the Bar as the right place for assisting it in regulating the practice of law and would like to place all those efforts there. Mr. Christiansen observed that it would be helpful to appoint a committee to study the Innovation Office joining the Bar. Mr. Lund noted that the long-term goal is that the Innovation Office will be self-funded. Mr. Stiles said that there are three potential funding sources to help the IO get through this fiscal year. Mr. Lund said the budget ask is around \$500,000 but there would be some cost-savings with using some of the Bar's resources. Ms. Woods noted that the Bar would become a large employer once it hits 50 employees, which will lead to more costs (FMLA, etc.), which would happen if the Bar added IO employees. Ms. Woods said the licensees in her area are against the IO, so that will be a consideration and something to study. Ms. Sylvester noted that there will be legal implications that will need to be studied. Ms. Quist noted that she saw positives and negatives with this but wondered whether the Supreme Court could force the Commission to take this on. Ms. Woods observed that education on how the IO could benefit members would be helpful. The court has not taken a position yet on whether Bar dues would need to be raised. Mr. Stiles observed that the Court is very interested in what the Commission thinks. Mr. Christiansen moved to study this issue very carefully (taxes, legal, funding, etc.). Ms. Thuet added that someone from IO should be added. Committee should also be engaged in education. Mr. Hoffman said the committee should be also looking at how all the programs are funded and affect the Bar. Greg Hoole seconded the motion. The motion carried.

### **2.3 Sentencing Commission Appointments:**

Ms. Thuet noted that there are 19 applicants for this. Commission recommends 2 applicants, one who is a private practice criminal lawyer and one who is a juvenile defender. Ms. Cordova recommended Pam Vickery and Edward Brass. Katie Woods moved to approve Pam Vickery. Rick Hoffman seconded. The motion passed unanimously. The Commission narrowed the list to Edward Brass, Rich Gallegos, Skye Lazaro and took a silent vote. The vote was in favor of Skye Lazaro.

### **2.4 Approve 2022-2023 Client Security Fund Assessment:**

Ms. Wright explained the client security fund assessment. The Bar has not assessed since 2017-2018 and then it was \$5. The request this year is \$10. Ms. Woods noted that there is enough money in this year's budget to replenish the fund at \$101,780. Ms. Woods moved and Ms. Thuet seconded. The motion carried.

## **3. Information Items:**

### **3.1 Ideas for Incentivizing Pro Bono Work: Mark Baer, George Sutton, Marcus Degan**

Mr. Baer noted that there were over 750k eviction and debt collection cases in Utah filed from January 2013 to September 30, 2021. He also observed that there are some abuses and overreach in filings and motions that are steamrolling defendants. He said CLE credit is a start. He requested that Bar dues be reduced as an offset for providing pro bono. He then observed that holding a reception a couple times per year to recognize the volunteer efforts would be helpful. Dean Warner observed that the law schools could take on clinics on these issues. Mr. Sutton noted that most of the defendants are unsophisticated, and he can help get through the red tape. He observed that there are abuses in many the cases he handles. Someone who has knowledge of merits, contracts, evidence can help, including first year law students. He noted the Pew study that came out this week which is highlighting a scandal. He asked for the Commission's support in having a notice added to complaints in these cases, just like Miranda warnings. He circulated a proposed notice. He said this is simply a step to be proactive. Ms. Sylvester educated the Commission on the rules process, the efforts the courts have already taken, and the receptivity to access to justice efforts. Dean Warner noted the efforts being undertaken at the U Law School with Stacey Butler. Mr. Degan noted that there is less of an access to justice gap and more of barriers baked into rules and statutes. Dean Warner said Justice Pearce is chairing a committee on alternative licensure. Funding for a pro bono luncheon is an ask that Ms. Thuet said the Commission could support. Mr. Hoole moved to support a luncheon at \$1500 with ongoing support to the Access to Justice Commission for its needs to drum up support for getting pro bono help. Ms. Cordova noted that ULS has a boot camp of sorts to teach. A2J can ask for more. Katie Woods seconded. The motion carried.

### **3.2 JIOP Funding: Erik Christiansen:**

Mr. Christiansen asked for \$3,000 to close the funding gap for 14 internships this summer. He noted that he has an outstanding ask to a firm. The Commission tabled the request pending what happens with the firm.

**3.3 Report on Western States Bar Conference: Katie Woods:**

This item was tabled.

**3.4 Report on ABA Day: Erik Christiansen:**

This item was tabled.

**4. Executive Session:**

An executive session was held.

**5. Adjournment.**

The meeting adjourned at 1:15 p.m.

**CONSENT AGENDA**

The following items were approved without discussion.

1. Minutes of March 10, 2022 Commission Meeting
2. Fund for Client Protection Recommendations, dated March 18, 2022.
3. Fund for Client Protection Recommendations, dated April 15, 2022.
4. Establish Mental Health Provider Review Committee.

# TAB 9



**UTAH STATE BAR**  
**Budget and Finance Committee**  
**Financial Results as of April 30, 2022**  
**and for the ten months then ended**

**FINANCIAL STATEMENT HIGHLIGHTS**

The results of the financials for the first ten months of the fiscal year show total revenues overreported compared to the budget, while expenses underreported, thus resulting in a favorable variance of \$92,507 compared to the budget.

**Year-to-Date (YTD) Net Profit – Accrual Basis:**

	<b>Actual</b>	<b>Budget</b>	<b>Fav(unfav) \$ Variance</b>	<b>Fav(unfav) % Variance</b>
YTD revenue	6,342,140	6,298,842	43,298	1%
YTD expenses	5,412,304	5,461,512	49,209	1%
<b>YTD net profit/(loss)</b>	<b>929,836</b>	<b>837,329</b>	<b>92,507</b>	<b>11%</b>

YTD net income is \$929,836 and is \$92,507 over budget.

**YTD Net Profit –Cash Basis:** Adding back year-to-date depreciation expense of \$117,733 and deducting capital expenditures of \$68,762, the cash basis year-to-date net profit is approximately \$48,971 higher.

**Explanations for Departments with Net Profit Variances of \$10k and 5% Over/Under Budget and/or significant activity:**

**Admissions:** YTD net profit for the first ten months of fiscal year 21/22 is \$113,700 more than budgeted, as Admissions revenue is overperforming by \$85,276 compared to the budget. It appears that all areas of Admissions revenue are performing better than budgeted. Expenses also appear to perform better than budgeted for now. We note that salaries are performing better than budgeted, which is due to the lower than budget salaries and wages and is discussed below at the NLTP section.

**NLTP:** YTD net spending is \$20,429 less than budgeted. NLTP revenue is performing \$882 better than expected, but the reason for the larger than budgeted loss is due to expenses running higher than expected. Expenses for the department related to salaries and benefits are \$24,985 higher than budget due to the NLTP director (who is also the director of Admissions) spending more time on the NLTP program than budgeted for the first nine months of the year. As the director for the two departments is filled by one person, the higher NLTP salaries and wages results in lower than budget salaries in Admissions. Additionally, during March, a new employee was hired to manage the NLTP program. As such, we expect the Admissions Director will spend less time on the NLTP program moving forward as the new employee takes over the NLTP duties.

**CLE:** For the first ten months of fiscal year 21/22, the CLE department's revenue underreported \$27,043 (8%) compared to the budget, while expenses overreported by \$16,293 (5%) compared to the budget. CLE Registrations is the most significant revenue item for this department, which underreported by \$89,872 compared to the budget. In-person CLE events continue to mostly be held virtually due to COVID pandemic and therefore are priced slightly lower than an in-person CLE. The CLE department continues to hold events virtually and evaluate appropriate registration prices that promote attendance while also adequately providing a CLE-benefit to attending members. Video CLE sales also appear lower than

**UTAH STATE BAR**  
**Budget and Finance Committee**  
**Financial Results as of April 30, 2022**  
**and for the ten months then ended**

budgeted by \$22,426, which is due to the budget being based off prior year results and during the prior year, video sales were higher than usual due to the extended CLE reporting period.

**Fall Forum:** The Forum was held virtually each week from November through January, and registration revenues have performed better than budgeted. Revenues for the event are \$11,282 higher than budgeted; and expenses are lower than expected due to the online format. The event is currently reporting a net profit of \$55,936

**Spring Convention:** The Spring Convention that is currently held virtually each week beginning March 10<sup>th</sup> to May 12<sup>th</sup> has had positive turnout, with the event currently reporting a net profit of \$55,951. Although the revenues are currently \$60,612 less than budgeted, expenses are also lower than budgeted by \$95,660, which has resulted in the overall net profit for the event at April month-end. As the event continues into May, we expect more revenues and expenses to come in but overall we are anticipating the virtual event will result in a favorable net profit.

**Member Services:** Member Services YTD net spending was \$213,114 compared to budgeted net spending of \$290,518, a difference of \$77,404. The reason for the variance is mostly due to lower-than-budgeted expenses, most likely the result of limited spending in July, August and September due to budget delays and reduced activity throughout the year due to the pandemic. Also advertising revenues for Bar Journal ads are overreporting.

**Public Services:** Public Services YTD net spending is \$55,143 less than budgeted, which is due to expenses running under budget. The FY 21/22 budget allowed for almost \$20,000 in spending for the Tuesday Night Bar, however the program was moved to a virtual format and therefore very few expenses are necessary to run the program.

**Bar Operations:** Bar Operations net spending is currently reporting \$321,627 higher than budgeted, with the majority of the excess over budgeted related to the Program Services expenses. During the April 2022 Bar Commission meeting a \$250,000 donation to And Justice For All was awarded, as well as \$101,780 contribution to the Fund for Client Protection.

**Facilities:** Bar meeting room facilities continue to be underutilized due to the COVID pandemic, which has resulted in lower-than-budgeted revenues and expenses up through April. However, as the pandemic continues to show improvement, the Bar has been able to open its doors to welcome more in-person meetings, which will hopefully result in higher rental revenues in the coming months.

**UTAH STATE BAR**  
**Budget and Finance Committee**  
**Financial Results as of April 30, 2022**  
**and for the ten months then ended**

**ADDITIONAL COMMENTS**

**Board Designated Reserves:** In consultation with Bar management and the Budget & Finance Committee, the Commission informally targeted the following reserve amounts:

Operations Reserve (3 months' operations)	\$1,639,219
Capital Replacement Reserve (equipment)	200,000
Capital Replacement Reserve (building)*	<u>372,930</u>
Total	\$2,212,149
Estimated cash reserve at April 30, 2022	<u>\$4,989,961</u>
Estimated cash reserve over board-designated reserve	<u>\$2,777,812</u>

**Utah State Bar  
Income Statement  
April 30, 2022**

	Actual LYTD	Actual YTD	Budget YTD	Fav (Unfav) variance	% of Budget	Total Budget	YTD % of Tot Budget
<b>Revenue</b>							
Licensing	4,582,117	4,725,343	4,672,983	52,360	101%	4,728,378	100%
Admissions	399,626	492,469	407,193	85,276	121%	438,901	112%
NLTP	49,109	50,196	49,315	882	102%	57,154	88%
OPC	28,846	26,872	24,068	2,804	112%	50,893	53%
CLE	241,282	311,905	338,948	(27,043)	92%	407,317	77%
Summer Convention	-	197,225	141,640	55,585	139%	141,640	139%
Fall Forum	56,368	87,005	75,723	11,282	115%	75,724	115%
Spring Convention	55,992	63,640	124,252	(60,612)	51%	124,252	51%
Member Services	256,345	276,964	256,344	20,620	108%	293,977	94%
Public Services	46,699	40,972	33,958	7,014	121%	36,898	111%
Bar Operations	66,352	1,606	66,330	(64,724)	2%	67,285	2%
Facilities	31,426	67,942	108,088	(40,146)	63%	135,457	50%
Total Revenue	5,814,161	6,342,140	6,298,842	43,298	101%	6,557,876	97%
<b>Expenses</b>							
Licensing	171,313	166,140	146,938	(19,202)	113%	155,055	107%
Admissions	431,245	372,412	400,836	28,424	93%	478,263	78%
NLTP	86,141	50,623	29,313	(21,310)	173%	32,806	154%
OPC	1,204,872	1,226,442	1,277,418	50,976	96%	1,517,546	81%
CLE	208,005	355,075	338,781	(16,293)	105%	462,515	77%
Summer Convention	6,519	188,464	137,247	(51,216)	137%	141,640	133%
Fall Forum	26,701	31,068	75,722	44,654	41%	75,724	41%
Spring Convention	24,197	7,689	103,349	95,660	7%	124,252	6%
Member Services	453,968	490,078	546,862	56,784	90%	684,547	72%
Public Services	473,376	467,735	515,863	48,129	91%	599,077	78%
Bar Operations	1,284,802	1,767,878	1,510,975	(256,903)	117%	1,832,725	96%
Facilities	295,455	288,701	378,208	89,507	76%	452,726	64%
Total Expenses	4,666,595	\$ 5,412,304	5,461,512	49,209	99%	6,556,876	83%
<b>Net Profit (Loss)</b>	<b>\$ 1,147,566</b>	<b>\$ 929,836</b>	<b>\$ 837,329</b>	<b>\$ 92,507</b>	<b>111%</b>	<b>\$ 1,000</b>	<b>92984%</b>
Depreciation	139,913	117,733	144,555	26,822	81%	169,056	
Cash increase (decrease) from operations	1,287,479	1,047,569	981,884	65,685	107%	170,056	
Changes in operating assets/liabilities	(2,283,442)	(2,744,142)	(2,744,142)	-	100%	20,000	
Capital expenditures	53,732	(68,762)	(83,333)	14,571	83%	(157,000)	
<b>Net change in cash</b>	<b>\$ (942,231)</b>	<b>\$ (1,765,335)</b>	<b>\$ (1,845,591)</b>	<b>\$ 80,256</b>	<b>96%</b>	<b>\$ 33,056</b>	<b>-5340%</b>

**Utah State Bar  
Licensing  
April 30, 2022**

	Actual LYTD	Actual YTD	Budget YTD	Fav (Unfav) variance	% of Budget	Total Budget	YTD % of Tot Budget
<b>Revenue</b>							
4010 · Section/Local Bar Support fees	17,292	18,048	17,638	410	102%	17,638	102%
4004 · Admissions - Laptop Fees	575	455	587	(132)	78%	587	78%
4006 · Transfer App Fees	-	-	-	-	#DIV/0!	-	#DIV/0!
4011 · Admissions LPP	2,255	2,250	2,255	(5)	100%	2,738	82%
4021 · Lic Fees > 3 Years	3,755,635	3,831,855	3,830,747	1,108	100%	3,832,047	100%
4020 · NLTP Fees	750	-	765	(765)	0%	765	0%
4022 · Lic Fees < 3 Years	205,140	207,365	209,243	(1,878)	99%	209,498	99%
4023 · Lic Fees - House Counsel	47,490	52,165	48,440	3,725	108%	48,766	107%
4025 · Pro Hac Vice Fees	168,575	177,975	171,948	6,027	104%	219,173	81%
4024 · Lic Fees LPP	2,150	4,600	2,193	2,407	210%	2,193	210%
4026 · Lic Fees - Inactive/FS	116,710	118,265	119,045	(780)	99%	118,891	99%
4027 · Lic Fees - Inactive/NS	218,925	221,715	223,304	(1,589)	99%	224,375	99%
4029 · Prior Year Lic Fees	-	-	-	-	#DIV/0!	-	#DIV/0!
4030 · Certs of Good Standing	14,720	15,640	15,015	625	104%	18,340	85%
4061 · Advertising Revenue	-	-	-	-	#DIV/0!	122	0%
4095 · Miscellaneous Income	205	60	208	(148)	29%	250	24%
4096 · Late Fees	31,695	74,950	31,595	43,355	237%	32,995	227%
Total Revenue	4,582,117	4,725,343	4,672,983	52,360	101%	4,728,378	100%
<b>Expenses</b>							
Program Services	37,064	26,588	31,268	4,680	85%	37,138	-
Salaries & Benefits	97,735	114,176	101,202	(12,974)	113%	123,279	93%
General & Administrative	28,469	16,652	6,225	(10,427)	267%	(15,080)	-110%
Building Overhead	8,045	8,725	8,243	(482)	106%	9,718	90%
Total Expenses	171,313	166,140	146,938	(19,202)	113%	155,055	107%
<b>Net Profit (Loss)</b>	<b>\$ 4,410,804</b>	<b>\$ 4,559,203</b>	<b>\$ 4,526,045</b>	<b>\$ 33,158</b>	<b>101%</b>	<b>\$ 4,573,323</b>	<b>100%</b>

Note: Includes LPP staff time and exam expense



**Utah State Bar  
Admissions  
April 30, 2022**

	Actual LYTD	Actual YTD	Budget YTD	Fav (Unfav) variance	% of Budget	Total Budget	YTD % of Tot Budget
<b>Revenue</b>							
4001 · Admissions - Student Exam Fees	106,150	144,375	108,273	36,102	133%	105,162	137%
4002 · Admissions - Attorney Exam Fees	57,950	67,875	59,110	8,765	115%	58,191	117%
4003 · Admissions - Retake Fees	27,850	28,900	28,407	493	102%	33,456	86%
4004 · Admissions - Laptop Fees	59,600	77,000	60,792	16,208	127%	63,444	121%
4005 · Admissions - Application Forms	8,200	1,150	8,364	(7,214)	-	8,364	-
4006 · Transfer App Fees	36,050	50,050	36,771	13,279	136%	46,002	109%
4008 · Attorney - Motion	66,300	71,400	67,626	3,774	106%	83,232	86%
4009 · House Counsel	12,750	22,100	13,005	9,095	170%	15,606	142%
4011 · Admissions LPP	200	-	200	(200)	0%	200	0%
4095 · Miscellaneous Income	3,576	4,360	3,645	715	120%	4,244	103%
4096 · Late Fees	21,000	25,400	21,000	4,400	121%	21,000	121%
4200 · Seminar Profit/Loss	-	(141)	-	(141)	#DIV/0!	-	#DIV/0!
Total Revenue	399,626	492,469	407,193	85,276	121%	438,901	91%
<b>Expenses</b>							
Program Services	47,597	93,026	59,594	(33,432)	156%	64,003	145%
Salaries & Benefits	304,791	204,576	259,164	54,587	79%	318,584	64%
General & Administrative	64,591	59,338	67,449	8,111	88%	78,443	76%
Building Overhead	14,266	15,471	14,630	(841)	106%	17,233	90%
Total Expenses	431,245	372,412	400,836	28,424	93%	478,263	78%
<b>Net Profit (Loss)</b>	<b>\$ (31,620)</b>	<b>\$ 120,057</b>	<b>\$ 6,357</b>	<b>\$ 113,700</b>	<b>1789%</b>	<b>\$ (39,362)</b>	<b>-305%</b>

**Utah State Bar**  
**NLTP**  
**April 30, 2022**

	Actual LYTD	Actual YTD	Budget YTD	Fav (Unfav) variance	% of Budget	Total Budget	YTD % of Tot Budget
<b>Revenue</b>							
4020 - NLTP Fees	48,300	49,800	49,266	534	101%	57,222	87%
4081 - CLE - Registrations	619	-	631	(631)	0%	631	0%
4200 - Seminar Profit/Loss	190	-	(583)	583	0%	(699)	-
Total Revenue	49,109	50,196	49,315	882	102%	57,154	88%
<b>Expenses</b>							
Program Services	-	-	2,210	2,210	0%	2,652	0%
Salaries & Benefits	66,230	30,644	5,659	(24,985)	542%	6,850	447%
General & Administrative	16,870	16,681	18,328	1,647	91%	19,630	85%
Building Overhead	3,041	3,298	3,116	(182)	106%	3,674	90%
Total Expenses	86,141	50,623	29,313	(21,310)	173%	32,806	154%
<b>Net Profit (Loss)</b>	<b>\$ (37,032)</b>	<b>\$ (427)</b>	<b>\$ 20,002</b>	<b>\$ (20,429)</b>	<b>-2%</b>	<b>\$ 24,348</b>	<b>-2%</b>

**Utah State Bar  
OPC  
April 30, 2022**

	Actual LYTD	Actual YTD	Budget YTD	Fav (Unfav) variance	% of Budget	Total Budget	YTD % of Tot Budget
<b>Revenue</b>							
4095 · Miscellaneous Income	1,953	3,819	3,546	273	108%	4,000	95%
4200 · Seminar Profit/Loss	26,893	23,053	20,522	2,531	112%	46,893	49%
Total Revenue	28,846	26,872	24,068	2,804	112%	50,893	53%
<b>Expenses</b>							
Program Services	1,127	4,286	12,005	7,719	36%	14,285	30%
Salaries & Benefits	1,060,707	1,066,167	1,095,656	29,489	97%	1,308,094	82%
General & Administrative	90,156	98,641	114,443	15,802	86%	130,074	76%
Building Overhead	52,882	57,348	55,314	(2,034)	104%	65,093	88%
Total Expenses	1,204,872	1,226,442	1,277,418	50,976	96%	1,517,546	81%
<b>Net Profit (Loss)</b>	<b>\$ (1,176,025)</b>	<b>\$ (1,199,569)</b>	<b>\$ (1,253,350)</b>	<b>\$ 53,780</b>	<b>96%</b>	<b>\$ (1,466,653)</b>	<b>82%</b>

**Utah State Bar  
CLE  
April 30, 2022**

	Actual LYTD	Actual YTD	Budget YTD	Fav (Unfav) variance	% of Budget	Total Budget	YTD % of Tot Budget
<b>Revenue</b>							
4052 · Meeting - Sponsor Revenue	7,250	11,675	14,999	(3,324)	78%	15,000	78%
4053 · Meeting - Vendor Revenue	-	-	-	-	#DIV/0!	-	-
4054 · Meeting - Material Sales	-	-	-	-	#DIV/0!	-	-
4081 · CLE - Registrations	185,949	185,484	275,356	(89,872)	67%	315,000	59%
4082 · CLE - Video Library Sales	86,917	62,921	85,346	(22,426)	74%	173,085	36%
4084 · Business Law Book Sales	-	-	-	-	#DIV/0!	-	-
4093 · Law Day Revenue	-	(48)	-	(48)	#DIV/0!	-	-
4095 · Miscellaneous Income	-	-	-	-	#DIV/0!	-	-
4200 · Seminar Profit/Loss	(38,834)	51,873	(36,753)	88,626	-141%	(95,768)	-54%
Total Revenue	241,282	311,905	338,948	(27,043)	92%	407,317	77%
<b>Expenses</b>							
Program Services	67,762	164,029	142,895	(21,133)	115%	202,596	81%
Salaries & Benefits	100,696	142,738	158,624	15,886	90%	211,664	67%
General & Administrative	27,184	35,987	24,566	(11,421)	146%	33,093	109%
Building Overhead	12,363	12,321	12,696	375	97%	15,162	81%
Total Expenses	208,005	355,075	338,781	(16,293)	105%	462,515	77%
<b>Net Profit (Loss)</b>	<b>\$ 33,277</b>	<b>\$ (43,169)</b>	<b>\$ 167</b>	<b>\$ (43,336)</b>	<b>-25893%</b>	<b>\$ (55,198)</b>	<b>78%</b>

**Utah State Bar  
Summer Convention  
April 30, 2022**

	Actual LYTD	Actual YTD	Budget YTD	Fav (Unfav) variance	% of Budget	Total Budget	YTD % of Tot Budget
<b>Revenue</b>							
4051 · Meeting - Registration	-	142,248	117,410	24,838	121%	117,410	121%
4052 · Meeting - Sponsor Revenue	-	14,750	10,275	4,475	144%	10,275	144%
4053 · Meeting - Vendor Revenue	-	13,800	6,550	7,250	211%	6,550	211%
4055 · Meeting - Sp Ev Registration	-	13,235	7,405	5,830	179%	7,405	179%
4095 · Miscellaneous Income	-	13,192	-	13,192	-	-	-
Total Revenue	-	197,225	141,640	55,585	139%	141,640	139%
<b>Expenses</b>							
Program Services	15	167,161	118,388	(48,773)	141%	118,388	141%
Salaries & Benefits	6,304	16,191	9,042	(7,149)	179%	12,154	133%
General & Administrative	200	5,111	9,817	4,706	52%	11,098	46%
Building Overhead	-	-	-	-	#DIV/0!	-	-
Total Expenses	6,519	188,464	137,247	(51,216)	137%	141,640	133%
<b>Net Profit (Loss)</b>	<b>\$ (6,519)</b>	<b>\$ 8,761</b>	<b>\$ 4,393</b>	<b>\$ 4,369</b>	<b>199%</b>	<b>\$ -</b>	<b>#DIV/0!</b>



**Utah State Bar  
Fall Forum  
April 30, 2022**

	Actual LYTD	Actual YTD	Budget YTD	Fav (Unfav) variance	% of Budget	Total Budget	YTD % of Tot Budget
<b>Revenue</b>							
4051 · Meeting - Registration	55,368	86,005	68,998	17,007	125%	68,999	125%
4052 · Meeting - Sponsor Revenue	-	-	-	-	#DIV/0!	-	-
4053 · Meeting - Vendor Revenue	1,000	1,000	4,950	(3,950)	20%	4,950	20%
4055 · Meeting - Sp Ev Registration	-	-	1,775	(1,775)	0%	1,775	-
Total Revenue	56,368	87,005	75,723	11,282	115%	75,724	115%
<b>Expenses</b>							
Program Services	18,732	21,269	64,464	43,195	33%	64,464	33%
Salaries & Benefits	1,825	3,413	4,159	746	82%	4,160	82%
General & Administrative	6,145	6,386	7,099	713	90%	7,100	90%
Building Overhead	-	-	-	-	#DIV/0!	-	-
Total Expenses	26,701	31,068	75,722	44,654	41%	75,724	41%
<b>Net Profit (Loss)</b>	<b>\$ 29,666</b>	<b>\$ 55,937</b>	<b>\$ 1</b>	<b>\$ 55,936</b>	<b>5593681%</b>	<b>\$ -</b>	<b>#DIV/0!</b>

**Utah State Bar  
Spring Convention  
April 30, 2022**

	Actual LYTD	Actual YTD	Budget YTD	Fav (Unfav) variance	% of Budget	Total Budget	YTD % of Tot Budget
<b>Revenue</b>							
4051 - Meeting - Registration	55,992	58,890	97,895	(39,005)	60%	97,895	60%
4052 - Meeting - Sponsor Revenue	-	-	13,500	(13,500)	0%	13,500	0%
4053 - Meeting - Vendor Revenue	-	4,750	10,950	(6,200)	43%	10,950	43%
4055 - Meeting - Sp Ev Registration	-	-	1,907	(1,907)	0%	1,907	0%
Total Revenue	55,992	63,640	124,252	(60,612)	51%	124,252	51%
<b>Expenses</b>							
Program Services	15,000	3,672	77,359	73,687	5%	94,989	4%
Salaries & Benefits	7,202	2,037	16,047	14,010	13%	16,256	13%
General & Administrative	1,995	1,980	9,944	7,964	20%	13,007	15%
Building Overhead	-	-	-	-	#DIV/0!	-	-
Total Expenses	24,197	7,689	103,349	95,660	7%	124,252	6%
<b>Net Profit (Loss)</b>	<b>\$ 31,795</b>	<b>\$ 55,951</b>	<b>\$ 20,903</b>	<b>\$ 35,048</b>	<b>268%</b>	<b>\$ -</b>	<b>#DIV/0!</b>

**Utah State Bar  
Member Services  
April 30, 2022**

	Actual LYTD	Actual YTD	Budget YTD	Fav (Unfav) variance	% of Budget	Total Budget	YTD % of Tot Budget
<b>Revenue</b>							
4010 · Section/Local Bar Support fees	82,904	84,399	82,904	1,495	102%	82,904	102%
4052 · Meeting - Sponsor Revenue	-	-	-	-	#DIV/0!	-	#DIV/0!
4061 · Advertising Revenue	164,326	181,734	164,325	17,409	111%	195,858	93%
4062 · Subscriptions	30	30	30	-	100%	30	100%
4071 · Mem Benefits - Lexis	900	979	900	79	109%	1,200	-
4072 · Royalty Inc - Bar J, MBNA, LM,M	8,175	9,822	8,175	1,647	120%	8,175	120%
Total Revenue	256,345	276,964	256,344	20,620	108%	293,977	94%
<b>Expenses</b>							
Program Services	192,160	219,506	227,672	8,166	96%	303,951	72%
Salaries & Benefits	141,893	129,680	153,756	24,075	84%	181,447	71%
General & Administrative	104,514	126,127	149,633	23,506	84%	180,318	70%
Building Overhead	15,401	14,764	15,801	1,037	93%	18,831	78%
Total Expenses	453,968	490,078	546,862	56,784	90%	684,547	72%
<b>Net Profit (Loss)</b>	<b>\$ (197,623)</b>	<b>\$ (213,114)</b>	<b>\$ (290,518)</b>	<b>\$ 77,404</b>	<b>73%</b>	<b>\$ (390,570)</b>	<b>55%</b>

**Utah State Bar  
Public Services  
April 30, 2022**

	Actual LYTD	Actual YTD	Budget YTD	Fav (Unfav) variance	% of Budget	Total Budget	YTD % of Tot Budget
<b>Revenue</b>							
4063 · Modest Means revenue	10,025	9,425	10,510	(1,085)	90%	13,000	73%
4093 · Law Day Revenue	-	-	2,250	(2,250)	0%	2,700	0%
4095 · Miscellaneous Income	20	20	20	-	100%	20	100%
4120 · Grant Income	39,576	27,178	21,178	6,000	128%	21,178	128%
4200 · Seminar Profit/Loss	(2,922)	4,349	-	4,349	#DIV/0!	-	-
Total Revenue	46,699	40,972	33,958	7,014	121%	36,898	111%
<b>Expenses</b>							
Program Services	106,469	124,066	160,393	36,327	77%	174,038	71%
Salaries & Benefits	280,283	291,515	301,404	9,889	97%	362,748	80%
General & Administrative	76,939	41,651	44,159	2,508	94%	50,593	82%
Building Overhead	9,685	10,503	9,907	(596)	106%	11,698	90%
Total Expenses	473,376	467,735	515,863	48,129	91%	599,077	78%
<b>Net Profit (Loss)</b>	<b>\$ (426,677)</b>	<b>\$ (426,762)</b>	<b>\$ (481,905)</b>	<b>\$ 55,143</b>	<b>89%</b>	<b>\$ (562,179)</b>	<b>76%</b>

**Utah State Bar  
Bar Operations  
April 30, 2022**

	Actual LYTD	Actual YTD	Budget YTD	Fav (Unfav) variance	% of Budget	Total Budget	YTD % of Tot Budget
<b>Revenue</b>							
4031 · Enhanced Web Revenue	-	-	-	-	-	-	-
4052 · Meeting - Sponsor Revenue	-	-	-	-	#DIV/0!	-	#DIV/0!
4053 · Meeting - Vendor Revenue	-	-	-	-	#DIV/0!	-	#DIV/0!
4060 · E-Filing Revenue	24,853	5,741	24,853	(19,112)	23%	24,853	23%
4103 · In - Kind Revenue - UDR	23	-	(2)	2	0%	-	#DIV/0!
4095 · Miscellaneous Income	20,680	617	20,681	(20,064)	3%	20,956	3%
4200 · Seminar Profit/Loss	-	-	-	-	#DIV/0!	-	-
Investment Income	20,796	(4,752)	20,798	(25,550)	-23%	21,476	97%
Total Revenue	66,352	1,606	66,330	(64,724)	2%	67,285	99%
<b>Expenses</b>							
Program Services	6,443	486,699	142,618	(344,082)	341%	178,877	272%
Salaries & Benefits	1,045,235	997,277	1,069,418	72,141	93%	1,304,037	76%
General & Administrative	189,631	239,052	254,461	15,409	94%	298,000	80%
In Kind	5,074	1,459	5,075	3,616	29%	5,404	27%
Building Overhead	38,418	43,390	39,403	(3,987)	110%	46,407	93%
Total Expenses	1,284,802	1,767,878	1,510,975	(256,903)	117%	1,832,725	96%
<b>Net Profit (Loss)</b>	<b>\$ (1,218,450)</b>	<b>\$ (1,766,271)</b>	<b>\$ (1,444,645)</b>	<b>\$ (321,627)</b>	<b>122%</b>	<b>\$ (1,765,440)</b>	<b>100%</b>



**Utah State Bar  
Facilities  
April 30, 2022**

	Actual LYTD	Actual YTD	Budget YTD	Fav (Unfav) variance	% of Budget	Total Budget	YTD % of Tot Budget
<b>Revenue</b>							
4039 · Room Rental-All parties	9,314	30,976	38,774	(7,798)	80%	51,386	60%
4042 · Food & Beverage Rev-All Parties	4,568	19,161	51,670	(32,509)	37%	62,654	31%
4043 · Setup & A/V charges-All parties	-	945	584	361	162%	701	135%
4090 · Tenant Rent	17,474	16,860	16,990	(130)	99%	20,646	82%
4095 · Miscellaneous Income	70	-	70	(70)	0%	70	0%
4103 · In - Kind Revenue - UDR	-	-	-	-	#DIV/0!	-	#DIV/0!
Total Revenue	31,426	67,942	108,088	(40,146)	63%	135,457	50%
<b>Expenses</b>							
Program Services	5,250	20,530	60,075	39,545	34%	60,835	34%
Salaries & Benefits	141,156	124,246	158,348	34,102	78%	185,606	67%
General & Administrative	(6,804)	(8,619)	2,055	10,674	-419%	17,470	-49%
In Kind	190	13,627	189	(13,438)	7210%	475	2869%
Building Overhead	155,663	138,917	157,541	18,624	88%	188,340	74%
Total Expenses	295,455	288,701	378,208	89,507	76%	452,726	64%
<b>Net Profit (Loss)</b>	<b>\$ (264,029)</b>	<b>\$ (220,760)</b>	<b>\$ (270,120)</b>	<b>\$ 49,361</b>	<b>82%</b>	<b>\$ (317,269)</b>	<b>70%</b>

**Utah State Bar**  
**Income Statement - Consolidated By Account**  
**April 30, 2022**

	Actual LYTD	Actual YTD	Budget YTD	Fav (Unfav) variance	% of Budget	Total Budget	YTD % of Tot Budget
<b>Revenue</b>							
4001 - Admissions - Student Exam Fees	106,150	144,375	108,273	36,102	133%	105,162	137%
4002 - Admissions - Attorney Exam Fees	57,950	67,875	59,110	8,765	115%	58,191	117%
4003 - Admissions - Retake Fees	27,850	28,900	28,407	493	102%	33,456	86%
4004 - Admissions - Laptop Fees	60,175	77,455	61,379	16,076	126%	64,031	121%
4005 - Admissions - Application Forms	8,200	1,150	8,364	(7,214)	14%	8,364	-
4006 - Transfer App Fees	36,050	50,050	36,771	13,279	136%	46,002	109%
4008 - Attorney - Motion	66,300	71,400	67,626	3,774	106%	83,232	86%
4009 - House Counsel	12,750	22,100	13,005	9,095	170%	15,606	142%
4010 - Section/Local Bar Support fees	100,196	102,447	100,542	1,905	102%	100,542	102%
4011 - Admissions LPP	2,455	2,250	2,455	(205)	92%	2,938	77%
4012 - Admissions Military Spouse	-	-	-	-	#DIV/0!	-	#DIV/0!
4020 - NLTP Fees	49,050	49,800	50,031	(231)	100%	57,987	86%
4021 - Lic Fees > 3 Years	3,755,635	3,831,855	3,830,747	1,108	100%	3,832,047	100%
4022 - Lic Fees < 3 Years	205,140	207,365	209,243	(1,878)	99%	209,498	99%
4023 - Lic Fees - House Counsel	47,490	52,165	48,440	3,725	108%	48,766	107%
4024 - Lic Fees LPP	2,150	4,600	2,193	2,407	210%	2,193	210%
4025 - Pro Hac Vice Fees	168,575	177,975	171,948	6,027	104%	219,173	81%
4026 - Lic Fees - Inactive/FS	116,710	118,265	119,045	(780)	99%	118,891	99%
4027 - Lic Fees - Inactive/NS	218,925	221,715	223,304	(1,589)	99%	224,375	99%
4029 - Prior Year Lic Fees	-	-	-	-	#DIV/0!	-	#DIV/0!
4030 - Certs of Good Standing	14,720	15,640	15,015	625	104%	18,340	85%
4039 - Room Rental-All parties	9,314	30,976	38,774	(7,798)	80%	51,386	60%
4042 - Food & Beverage Rev-All Parties	4,568	19,161	51,670	(32,509)	37%	62,654	31%
4043 - Setup & A/V charges-All parties	-	945	584	361	162%	701	135%
4051 - Meeting - Registration	111,360	287,143	284,303	2,840	101%	284,304	101%
4052 - Meeting - Sponsor Revenue	7,250	26,425	38,774	(12,349)	68%	38,775	68%
4053 - Meeting - Vendor Revenue	1,000	19,550	22,450	(2,900)	87%	22,450	87%
4054 - Meeting - Material Sales	-	-	-	-	#DIV/0!	-	-
4055 - Meeting - Sp Ev Registration	-	13,235	11,087	2,148	119%	11,087	119%
4060 - E-Filing Revenue	24,853	5,741	24,853	(19,112)	23%	24,853	23%
4061 - Advertising Revenue	164,326	181,734	164,325	17,409	111%	195,980	93%
4062 - Subscriptions	30	30	30	-	100%	30	100%
4063 - Modest Means revenue	10,025	9,425	10,510	(1,085)	90%	13,000	73%
4071 - Mem Benefits - Lexis	900	979	900	79	109%	1,200	-
4072 - Royalty Inc - Bar J, MBNA, LM,M	8,175	9,822	8,175	1,647	120%	8,175	120%
4081 - CLE - Registrations	186,568	185,484	275,987	(90,503)	67%	315,631	59%
4082 - CLE - Video Library Sales	86,917	62,921	85,346	(22,426)	74%	173,085	36%
4090 - Tenant Rent	17,474	16,860	16,990	(130)	98%	20,646	82%
4093 - Law Day Revenue	-	(48)	2,250	(2,298)	-2%	2,700	-2%
4095 - Miscellaneous Income	26,514	22,464	28,180	(5,716)	80%	29,550	76%
4096 - Late Fees	52,695	100,350	52,595	47,755	191%	53,995	186%
4103 - In - Kind Revenue - UDR	23	-	(2)	2	0%	-	#DIV/0!
4200 - Seminar Profit/Loss	(14,673)	79,135	(16,814)	95,948	-471%	(43,774)	-181%
Investment income	20,796	(4,752)	20,798	(25,550)	-23%	21,476	-22%
<b>Total Revenue</b>	<b>5,774,585</b>	<b>6,314,962</b>	<b>6,277,664</b>	<b>37,298</b>	<b>101%</b>	<b>6,536,698</b>	<b>97%</b>
<b>Program Service Expenses</b>							
5001 - Meeting Facility-external only	15	37,140	19,611	(17,529)	189%	25,726	144%
5002 - Meeting Facility-internal only	8,794	16,156	19,798	3,642	82%	28,034	58%
5013 - ExamSoft	15,471	32,816	15,490	(17,326)	212%	15,490	212%
5014 - Questions	52,715	62,502	46,880	(15,622)	133%	52,750	118%
5015 - Investigations	931	1,425	1,064	(361)	134%	1,137	125%
5016 - Credit Checks	1,740	2,471	1,739	(732)	142%	2,534	97%
5017 - Medical Exam	-	480	-	(480)	#DIV/0!	320	-
5020 - Exam Scoring	-	-	-	-	#DIV/0!	-	-
5025 - Temp Labor/Proctors	-	90	-	(90)	#DIV/0!	-	#DIV/0!
5030 - Speaker Fees & Expenses	6,500	14,259	10,232	(4,027)	139%	10,232	139%
5031 - Speaker Reimb. - Receipt Req'd	-	-	4,830	4,830	0%	5,824	0%
5035 - Awards	6,723	11,724	2,597	(9,127)	451%	3,358	349%
5037 - Grants/ contributions - general	500	360,780	10,395	(350,385)	3471%	17,500	2062%
5040 - Witness & Hearing Expense	14	385	425	40	90%	766	50%
5041 - Process Serving	282	706	605	(101)	117%	605	117%
5046 - Court Reporting	1,596	1,455	1,596	141	91%	1,596	91%
5047 - Casemaker	44,935	45,283	41,616	(3,667)	109%	50,000	91%
5055 - Legislative Expense	50,000	50,000	50,000	-	100%	60,000	83%
5060 - Program Special Activities	-	5,481	-	(5,481)	#DIV/0!	-	-
5061 - LRE - Bar Support	60,000	64,182	60,000	(4,182)	107%	64,182	100%
5062 - Law Day	-	370	8,950	8,580	4%	11,653	3%
5063 - Special Event Expense	6,829	27,166	38,235	11,069	71%	40,603	67%
5064 - MCLE Fees Paid	19,672	44,226	24,702	(19,525)	179%	38,050	116%
5070 - Equipment Rental	-	7,258	21,730	14,472	33%	23,894	30%
5075 - Food & Bev-external costs only	9,823	165,340	253,905	88,565	65%	292,249	57%
5076 - Food & beverage - internal only	6,666	12,177	27,975	15,798	44%	33,395	36%
5079 - Soft Drinks	2,272	3,459	4,539	1,080	76%	5,348	65%
5085 - Misc. Program Expense	1,298	1,195	11,851	10,656	10%	13,961	9%
5090 - Commission Expense	30,619	28,899	29,364	466	98%	37,404	77%
5095 - Wills for Heroes	205	970	1,151	181	84%	1,767	55%
5096 - UDR Support	-	-	-	-	#DIV/0!	-	-
5099 - Blomquist Hale	62,806	74,705	73,554	(1,151)	102%	91,041	82%
5702 - Travel - Lodging	7,065	27,385	34,240	6,855	80%	39,520	69%
5703 - Travel - Transportation/Parking	282	7,328	11,429	4,102	64%	13,376	55%
5704 - Travel - Mileage Reimbursement	1,035	4,899	8,035	3,136	61%	9,477	52%
5705 - Travel - Per Diems	-	3,100	2,363	(737)	131%	2,868	108%
5706 - Travel - Meals	-	-	879	879	0%	1,054	0%
5707 - Travel - Commission Mtgs	-	39,610	32,080	(7,530)	123%	38,500	103%
5805 - ABA Annual Meeting	-	300	4,296	3,996	7%	5,171	6%
5810 - ABA Mid Year Meeting	100	2,738	9,938	7,199	28%	11,233	24%
5815 - Commission/Education	-	11,775	15,035	3,260	78%	20,550	57%
5820 - ABA Annual Delegate	-	1,234	4,210	2,976	29%	5,069	24%
5830 - Western States Bar Conference	205	15,819	11,065	(4,754)	143%	13,278	119%
5840 - President's Expense	15,163	15,000	14,769	(231)	102%	20,000	75%
5841 - President's Reimbursement	-	-	-	-	#DIV/0!	-	#DIV/0!
5845 - Reg Reform Task Force	-	-	-	-	#DIV/0!	-	-
5850 - Leadership Academy	-	8,056	8,330	274	97%	10,200	79%
5855 - Bar Review	-	5,565	5,000	(565)	111%	6,000	93%
5865 - Retreat	-	21,944	27,750	5,806	79%	33,300	66%
5866 - Wellbeing Committee	46,239	53,125	63,781	10,656	83%	70,000	76%

**Utah State Bar**  
**Income Statement - Consolidated By Account**  
**April 30, 2022**

	Actual LYTD	Actual YTD	Budget YTD	Fav (Unfav) variance	% of Budget	Total Budget	YTD % of Tot Budget
5867 - Bar Membership Survey	-	7,750	-	(7,750)	#DIV/0!	-	#DIV/0!
5868 - UCLI Support	-	-	-	-	#DIV/0!	-	#DIV/0!
5960 - Overhead Allocation - Seminars	(3,404)	-	23,384	23,384	0%	18,835	0%
5970 - Event Revenue Sharing - 3rd Pty	40,531	32,105	39,523	7,418	81%	68,366	47%
<b>Total Program Service Expenses</b>	<b>497,620</b>	<b>1,330,832</b>	<b>1,098,940</b>	<b>(231,891)</b>	<b>121%</b>	<b>1,316,216</b>	<b>101%</b>
<b>Salaries &amp; Benefit Expenses</b>							
5510 - Salaries/Wages	2,556,730	2,448,016	2,610,437	162,421	94%	3,137,489	78%
5605 - Payroll Taxes	188,620	196,277	195,054	(1,223)	101%	243,400	81%
5610 - Health Insurance	232,806	226,837	250,659	23,822	90%	310,096	73%
5620 - Health Ins/Medical Reimb	6,100	4,950	5,808	858	85%	7,144	69%
5630 - Dental Insurance	12,598	13,286	13,027	(259)	102%	17,592	76%
5640 - Life & LTD Insurance	15,891	16,000	18,649	2,649	86%	23,275	69%
5645 - Workman's Comp Insurance	1,952	2,198	1,950	(248)	113%	2,733	80%
5650 - Retirement Plan Contributions	222,437	205,239	219,139	13,900	94%	270,528	76%
5655 - Retirement Plan Fees & Costs	13,650	4,730	12,864	8,134	37%	17,300	27%
5660 - Training/Development	3,274	5,128	4,892	(237)	105%	5,322	96%
<b>Total Salaries &amp; Benefit Expenses</b>	<b>3,254,057</b>	<b>3,122,660</b>	<b>3,332,478</b>	<b>209,818</b>	<b>94%</b>	<b>4,034,879</b>	<b>81%</b>
<b>General &amp; Administrative Expenses</b>							
7025 - Office Supplies	11,422	14,202	12,568	(1,634)	113%	16,229	88%
7015 - Office Equip Repairs	-	-	-	-	#DIV/0!	-	#DIV/0!
7033 - Operating Meeting Supplies	1,398	2,124	8,741	6,617	24%	11,392	19%
7035 - Postage/Mailing, net	34,544	37,011	34,384	(2,627)	106%	59,248	62%
7040 - Copy/Printing Expense	89,384	97,182	108,841	11,659	89%	135,064	72%
7041 - Copy/Print revenue	(12,617)	(13,942)	(12,613)	1,329	111%	(16,766)	83%
7045 - Internet Service	11,014	21,088	12,930	(8,158)	163%	12,483	169%
7050 - Computer Maintenance	33,023	57,869	33,180	(24,689)	174%	40,670	142%
7055 - Computer Supplies & Small Equip	13,441	22,591	12,736	(9,855)	177%	14,525	156%
7089 - Membership Database Fees	41,437	46,670	64,919	18,249	72%	69,437	67%
7095 - Fax Equip & Supplies	(7)	(140)	(10)	130	1400%	(10)	-
7100 - Telephone	55,472	48,030	55,309	7,279	87%	65,109	74%
7105 - Advertising	3,195	5,450	42,415	36,965	13%	50,856	11%
7106 - Public Notification	290	-	754	754	0%	754	0%
7107 - Production Costs	-	2,500	-	(2,500)	#DIV/0!	-	#DIV/0!
7110 - Publications/Subscriptions	24,042	22,413	26,013	3,600	86%	30,350	74%
7115 - Public Relations	-	-	-	-	#DIV/0!	-	#DIV/0!
7120 - Membership/Dues	10,338	15,439	10,303	(5,136)	150%	10,830	143%
7135 - Bank Service Charges	591	471	591	120	80%	938	50%
7136 - ILM Service Charges	15,088	17,870	15,088	(2,782)	118%	17,944	100%
7138 - Bad debt expense	-	-	-	-	#DIV/0!	-	-
7140 - Credit Card Merchant Fees	56,325	58,635	35,591	(23,044)	168%	63,406	92%
7141 - Credit Card surcharge	(24,337)	(21,996)	(24,338)	(2,342)	90%	(68,872)	32%
7145 - Commission Election Expense	2,717	3,013	2,700	(313)	112%	2,700	112%
7150 - E&O/Off & Dir Insurance	44,842	49,274	44,700	(4,574)	110%	53,637	92%
7160 - Audit Expense	35,435	38,143	35,435	(2,708)	108%	35,435	108%
7170 - Lobbying Rebates	78	61	80	19	76%	232	26%
7175 - O/S Consultants	136,582	77,098	162,135	85,037	48%	178,979	43%
7176 - Bar Litigation	7,175	17,377	6,865	(10,512)	259%	10,000	174%
7177 - UPL	1,564	186	10,000	9,814	2%	10,000	2%
7178 - Offsite Storage/Backup	-	-	-	-	#DIV/0!	-	#DIV/0!
7179 - Payroll Adm Fees	2,614	2,459	2,613	155	94%	3,126	79%
7180 - Administrative Fee Expense	831	1,467	831	(636)	177%	996	147%
7190 - Lease Interest Expense	-	-	-	-	#DIV/0!	-	#DIV/0!
7191 - Lease Sales Tax Expense	-	-	-	-	#DIV/0!	-	#DIV/0!
7195 - Other Gen & Adm Expense	4,009	16,444	5,419	(11,025)	303%	15,054	109%
<b>Total General &amp; Administrative Expenses</b>	<b>599,889</b>	<b>638,988</b>	<b>708,179</b>	<b>69,191</b>	<b>90%</b>	<b>823,746</b>	<b>73%</b>
<b>In Kind Expenses</b>							
7103 - InKind Contrib-UDR & all other	5,264	15,086	5,264	(9,822)	287%	5,879	257%
<b>Total In Kind Expenses</b>	<b>5,264</b>	<b>15,086</b>	<b>5,264</b>	<b>(9,822)</b>	<b>287%</b>	<b>5,879</b>	<b>90%</b>
<b>Building Overhead Expenses</b>							
6015 - Janitorial Expense	13,676	23,040	13,706	(9,334)	168%	17,062	135%
6020 - Heat	18,880	19,317	19,207	(110)	101%	21,605	89%
6025 - Electricity	33,915	35,405	34,503	(902)	109%	42,212	84%
6030 - Water/Sewer	5,168	4,910	5,331	421	92%	6,388	77%
6035 - Outside Maintenance	11,116	17,319	11,336	(5,983)	153%	14,343	121%
6040 - Building Repairs	15,935	17,681	14,335	(3,346)	123%	18,421	96%
6045 - Bldg Mtncn Contracts	25,621	24,080	26,837	2,757	90%	30,914	78%
6050 - Bldg Mtncn Supplies	-	-	-	-	#DIV/0!	-	#DIV/0!
6055 - Real Property Taxes	28,596	27,442	29,450	2,008	93%	35,300	78%
6060 - Personal Property Taxes	335	311	340	29	91%	410	76%
6065 - Bldg Insurance/Fees	16,608	17,500	17,051	(449)	109%	20,445	86%
6070 - Building & Improvements Depre	56,199	69,429	54,323	(15,106)	128%	65,918	105%
6075 - Furniture & Fixtures Depre	2,622	2,267	1,977	(290)	119%	3,375	67%
7065 - Computers, Equip & Sftwre Depre	81,092	46,037	88,255	42,218	52%	99,763	46%
<b>Total Building Overhead Expenses</b>	<b>309,764</b>	<b>304,738</b>	<b>316,651</b>	<b>11,913</b>	<b>96%</b>	<b>376,156</b>	<b>82%</b>
<b>Total Expenses</b>	<b>4,666,595</b>	<b>5,412,304</b>	<b>5,461,512</b>	<b>49,209</b>	<b>99%</b>	<b>6,556,876</b>	<b>71%</b>
<b>Other</b>							
4300 - Gain (Loss) - Disposal Of Assets	-	-	-	-	#DIV/0!	-	#DIV/0!
4120 - Grant Income	39,576	27,178	21,178	(6,000)	128%	21,178	128%
	39,576	27,178	21,178	(6,000)	128%	21,178	
<b>Net Profit (Loss)</b>	<b>\$ 1,147,566</b>	<b>\$ 929,836</b>	<b>\$ 837,329</b>	<b>\$ 92,507</b>	<b>111%</b>	<b>\$ 1,000</b>	<b>92984%</b>

## Utah State Bar Balance Sheets

	4/30/2022	6/30/2021
<b>ASSETS</b>		
Current Assets		
Petty Cash	\$ 625	\$ 625
Cash in Bank	422,083	1,466,786
Invested Funds	6,222,062	6,942,694
Total Cash/Investments	6,644,770	8,410,105
Accounts Receivable	62,474	25,924
Prepaid Expenses	226,173	134,036
A/R - Sections	47,485	49,354
Total Other Current Assets	336,133	209,313
Total Current Assets	6,980,903	8,619,418
Fixed Assets		
Property & Equipment	5,036,478	4,967,716
Accumulated Depreciation	(4,301,898)	(4,184,165)
Land	633,142	633,142
Total Fixed Assets	1,367,721	1,416,692
<b>TOTAL ASSETS</b>	<b>\$ 8,348,624</b>	<b>\$ 10,036,110</b>
<b>LIABILITIES &amp; EQUITY</b>		
Liabilities		
Current Liabilities		
AP Trade	\$ 292,806	\$ 147,410
Other Accounts Payable	118,357	119,207
Accrued Payables	464,090	543,060
Cap Lease Oblig - ST	4,112	4,112
A/P - Sections	1,595	191,515
Deferred Revenue	13,851	2,502,575
Total Current Liabilities	894,811	3,507,878
Long Term Liabilities		
Capital Lease Oblig	(4,255)	-
PPP Loan	-	-
Total Long Term Liabilities	(4,255)	-
Total Liabilities	890,556	3,507,878
Equity		
Unrestricted Net Assets (R/E)	6,528,232	5,503,712
Fund Balance - Current Year	929,836	1,024,520
Total Equity	7,458,068	6,528,232
<b>TOTAL LIABILITIES &amp; EQUITY</b>	<b>\$ 8,348,624</b>	<b>\$ 10,036,110</b>

Balance Sheet Classification

Base Currency: USD As of 04/30/2022

ILM-USB-SECTION (20054)

Dated: 05/03/2022

CE												
Identifier	Description	Current Units	Rating	Coupon	Effective Maturity	Book Yield	Yield	Base Book Value	Base Net Total Unrealized Gain/Loss	Market Price	Base Accrued Balance	Base Market Value + Accrued
38141WZ73	GOLDMANFS GOVT INST	286,869.27	AAA	0.320	04/30/2022	0.310	0.310	286,869.27	0.00	1,000.00	0.00	286,869.27
CCYUSD	Cash	71.38	AAA	0.000	04/30/2022	0.000	0.000	71.38	0.00	1,000.00	0.00	71.38
--	--	286,940.65	AAA	--	04/30/2022	0.310	0.310	286,940.65	0.00	1,000.00	0.00	286,940.65
ST												
Identifier	Description	Current Units	Rating	Coupon	Effective Maturity	Book Yield	Yield	Base Book Value	Base Net Total Unrealized Gain/Loss	Market Price	Base Accrued Balance	Base Market Value + Accrued
037833CP3	APPLE INC	40,000.00	AAA	0.727	05/11/2022	0.424	0.762	40,003.37	-3.81	99.9989	63.85	40,063.41
61744YAH1	MORGAN STANLEY	45,000.00	A+	2.750	05/19/2022	0.174	2.728	45,057.59	-57.86	99.9994	556.88	45,556.61
57629WCK4	MASSMUTUAL GLOBAL FUNDING II	45,000.00	AA+	2.250	07/01/2022	0.202	0.859	45,155.11	-49.68	100.2343	337.50	45,442.93
136069TY7	CANADIAN IMPERIAL BANK OF COMMERCE	45,000.00	AA	2.550	06/16/2022	0.155	1.641	45,136.07	-84.82	100.1139	430.31	45,481.57
025816BM0	AMERICAN EXPRESS CO	40,000.00	A	2.500	07/01/2022	0.389	1.783	40,142.81	-95.09	100.1193	250.00	40,297.72
89114QCD8	TORONTO-DOMINION BANK	40,000.00	A+	1.900	12/01/2022	0.334	2.123	40,365.90	-417.94	99.8699	316.67	40,264.63
912828P4	UNITED STATES TREASURY	200,000.00	AAA	1.875	07/31/2022	0.318	0.946	200,781.51	-312.76	100.2344	932.32	201,401.07
--	--	455,000.00	AA+	--	07/17/2022	0.293	1.344	455,642.36	-1,021.96	--	2,887.53	458,507.94
LT												
Identifier	Description	Current Units	Rating	Coupon	Effective Maturity	Book Yield	Yield	Base Book Value	Base Net Total Unrealized Gain/Loss	Market Price	Base Accrued Balance	Base Market Value + Accrued
064159VK9	BANK OF NOVA SCOTIA	45,000.00	A	1.625	05/01/2023	0.356	2.773	45,569.47	-1,076.89	98.8724	365.63	44,858.21
90348JT34	UBS Bank USA	25,000.00	A+	0.350	09/22/2023	0.400	0.400	24,982.57	0.00	99.9303	2.16	24,984.73
795451AU7	Sallie Mae Bank	25,000.00	BBB+	0.350	09/22/2023	0.400	0.400	24,982.57	0.00	99.9303	9.59	24,992.16
38149MZK4	Goldman Sachs Bank USA	25,000.00	A+	0.350	09/22/2023	0.400	0.400	24,982.57	0.00	99.9303	9.59	24,992.16
87165HD64	Synchrony Bank	200,000.00	BBB	0.400	09/25/2023	0.450	0.450	199,860.50	0.00	99.9303	83.29	199,943.79
87165EUF2	Synchrony Bank	25,000.00	BBB	0.400	09/18/2023	0.450	0.450	24,982.66	0.00	99.9306	12.50	24,995.16
05580AD92	BMW Bank of North America	25,000.00	AA-	0.350	09/25/2023	0.400	0.400	24,982.42	0.00	99.9297	9.11	24,991.53
48133DE71	JPMORGAN CHASE FINANCIAL COMPANY LLC	45,000.00	A	2.500	05/01/2023	2.500	3.015	45,000.00	-227.16	99.4952	6.25	44,779.09
--	--	415,000.00	BBB+	--	08/23/2023	0.650	0.966	415,342.76	-1,304.05	--	486.11	414,536.81
Summary												
Identifier	Description	Current Units	Rating	Coupon	Effective Maturity	Book Yield	Yield	Base Book Value	Base Net Total Unrealized Gain/Loss	Market Price	Base Accrued Balance	Base Market Value + Accrued
--	--	1,156,940.65	AA-	--	11/19/2022	0.425	0.953	1,158,925.77	-2,326.01	--	3,385.63	1,159,985.40

\* Grouped by: BS Class 2. \* Groups Sorted by: BS Class 2. \* Weighted by: Base Market Value + Accrued, except Book Yield by Base Book Value + Accrued. \* Holdings Displayed by: Lot.



**UTAH STATE BAR**  
**Membership Statistics**  
**April 30, 2022**

<b><u>STATUS</u></b>	<b><u>04/30/21</u></b>	<b><u>04/30/22</u></b>	<b><u>Change</u></b>
Active	8,831	8,956	125
Active under 3 years	867	827	(40)
Active Emeritus	266	268	2
In House Counsel	111	114	3
Foreign Legal Counsel	4	4	-
LPP	13	18	5
Military Spouse	-	-	-
<b>Subtotal - Active</b>	<b>10,092</b>	<b>10,187</b>	<b>95</b>
Inactive - Full Service	796	818	22
Inactive - No Service	2,028	2,059	31
Inactive Emeritus	367	417	50
Inactive House Counsel	10	10	-
Inactive LPP	-	-	-
<b>Subtotal - Inactive</b>	<b>3,201</b>	<b>3,304</b>	<b>103</b>
<b>Total Active and Inactive</b>	<b>13,293</b>	<b>13,491</b>	<b>198</b>
<b><u>Supplemental Information</u></b>			
Paralegals	159	155	(4)
<b><u>Active Attorneys by Region</u></b>			
1st Division (Logan - Brigham)	199	205	6
2nd Division (Davis - Weber)	967	994	27
3rd Division (Salt Lake)	5,588	5,551	(37)
4th Division (Utah)	1,353	1,393	40
5th Division (Southern Utah)	543	560	17
Out of State	1,442	1,484	42
<b>Total Active Attorneys</b>	<b>10,092</b>	<b>10,187</b>	<b>95</b>