

Utah State Bar Commission
Friday, October 16, 2020
Law & Justice Center and
<https://us02web.zoom.us/j/88033915574>

Agenda

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

- | | | |
|-----------------|-----|---|
| <i>05 Mins.</i> | 1.1 | Tonight's Dinner & Activity |
| <i>15 Mins.</i> | 1.2 | Committee/Seminar on Use of Deadly Force in Utah: Rod Snow |
| <i>10 Mins.</i> | 1.3 | Discuss Lawyers' Right of Expression (Tab 1, Page 3) |
| <i>20 Mins.</i> | 1.4 | Discuss Bar Executive Succession Process (To Be Distributed) |
| <i>05 Mins</i> | 1.5 | Discuss ABA Legal Intern Program |

2. 10:10 a.m. Action Items

- | | | |
|-----------------|-----|--|
| <i>20 Mins.</i> | 2.1 | Approve 2019-20 Audit Report: Rick Hoffman (Tab 2, Page 14) |
| <i>15 Mins.</i> | 2.2 | Selection of ABA Delegate (Tab 3, Page 48) |
| <i>10 Mins.</i> | 2.3 | Reinstate Lawyers Helping Lawyers as Bar Committee |
| <i>05 Mins.</i> | 2.4 | Selection of Outstanding Mentors (Tab 4, Page 76) |

3. 11:00 a.m. Discussion Items

- | | | |
|-----------------|-----|--|
| <i>60 Mins.</i> | 3.1 | Bar Survey & List of Commissioners' 5 Priorities (Tab 5, Page 91) |
| <i>10 Mins.</i> | 3.2 | Regulatory Reform and Bar Committee Planning: Erik Christiansen |

4. 12:10 a.m. Information Items

- | | | |
|-----------------|-----|--|
| <i>05 Mins.</i> | 4.1 | Announce Admissions Ceremony October 20th - Noon |
| <i>05 Mins.</i> | 4.2 | Judicial Nominating Publicity Follow-up: Marty Moore |

5. 12:20 p.m. Executive Session

12:45 p.m. Adjourn

Consent Agenda (Tab 6, Page 308)

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

1. Approve Minutes of August 28, 2020 Commission Meeting

Attachments (Tab 7, Page 313)

1. September Financials
2. Article on Diploma Privilege
3. Article on Sandbox Proposal
4. Michigan Federal Court Order Upholding Required Bar Membership
5. Article on Expungement Day

Calendar

October 20	Admissions Ceremony	Noon	Virtual
November 6	Executive Committee	Noon	Telephone/Video Conference
November 13	Commission Meeting	9:00 a.m.	TBD
December 11	Executive Committee	Noon	Telephone/Video Conference
December 18	Commission Meeting	9:00 a.m.	TBD

2021

January 2	Election Notices Due
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TAB

1

ⓘ Check your U.S. voter registration status or register to vote [here](#).

Michelle Barber's Abuse of Power and Misappropriation of City Resources



Jason [Follow](#)

Aug 15 · 11 min read



If you have been following the debate on Kaysville Fiber, you know that I'm neck deep in opposition. What you may not know is what some city officials have done in an attempt to silence this opposition.

Because of my opposition to Kaysville Fiber, Michele Barber, along with at least Katie Witt, Nic Mills (the city attorney), and Shayne Scott (the city manager) attempted to ruin my career as an attorney by filing an ethics complaint, which the Utah State Bar declined to investigate. They also used their position in the city government to ask the police chief to investigate my actions for criminal extortion (he wisely asked the County Attorney's Office to investigate to avoid any conflicts of interest). After reviewing Ms. Barber's statement, the county

investigator said, “it does not appear a criminal offense had occurred.” That’s right, in response to my right as a citizen to be vocal, involved, and in opposition they tried to use their position in government to try to ruin my career and punish me criminally. And they failed miserably.

This is the kind of stuff that happens in Putin’s Russia. Not Kaysville.

The ethics allegations were particularly troubling. As an attorney, if you have been found to violate the rules of professional ethics, you can be disbarred and cannot practice law. This was a serious accusation. This could have affected my ability to support my family. It’s also quite personal. I hold myself to high ethical standards (ask my clients, they will attest to as much). This was squarely a direct attack on my character.

Admittedly, I have been aggressive in opposition to Kaysville Fiber. I know I have made some people feel upset and according to some, I have been “inflammatory and disagreeable”. But it is not unethical or criminal to do so. And I have a fundamental right as a citizen to be vocal, aggressive, disagreeable, and inflammatory. I also have the right to upset people and make them uncomfortable. We all do!

You may be thinking I must have done something horribly wrong to justify this. Well, you can read the documents I have obtained (see below) and decide for yourself. But remember, two independent parties that know a thing or two about ethical and criminal investigations, the Utah State Bar Association and the Davis County’s Attorney office, looked into the allegations and both declined to investigate. That’s right, the allegations were so weak neither pursued an investigation beyond reviewing Ms. Barber’s complaint. Indeed, the County Investigator after interviewing Ms. Barber and only having facts in her favor concluded that “it does not appear a criminal offense has occurred.” The Utah State Bar similarly declined to investigate based on her statement.

So what happened? Well, in the fall of 2019 I was invited to negotiate a compromise between the Coalition and proponents of Kaysville Fiber. We were

asked to compromise like “two fierce saber warriors coming to the negotiation table for peace.” We happily agreed. On November 6, 2019, a colleague and I met with Ms. Barber and Andre Lortz (now a city council member) and two other member of the fiber committee: Jordan Stephenson and Brett Tarbox. We attended the meeting with the goal of being open and honest about our plans moving forward and the various options at our disposal.

I thought the meeting went quite well. The analogy of the two saber warriors was again used. And I recall both sides stating we were putting our sabers (or swords) on the table as a gesture of peace. We were open and honest about everything. This included discussions about reaching an agreement that would make the referendum, the appeal at the district court, and a potential lawsuit regarding the open meetings violation unnecessary. In that context and to be conciliatory, at one point I did say in the meeting we would “lay all of [our] swords on the table.”

After discussing the referendum, the appeal, and potential compromises, I mentioned we had one additional “lever to pull” in regard to what we felt was an open meetings violation. And we would likely pull that lever. If we were seeing the signals from the city we were hoping to see, we might not. Again, this was in harmony with the spirit of the meeting where we were openly negotiating a compromise and laying everything on the negotiating table. I did state this was a “sensitive item” because I had heard feedback from others that Ms. Barber, in particular, was very concerned about the issue. And I was trying to be sensitive. I put the issue on the table in the spirit of openly negotiating a compromise. Bringing this up, however, I felt went against everything I understand about negotiation strategy. But we did it to be transparent. I guess I should have listened to my instincts.

Fast forward a bit, a few citizens and I (not the Coalition) filed the open meetings act (OMA) lawsuit against the city. We did not name any individuals. Instead we only named the city. The district court has since dismissed this suit, and we choose not to appeal.

In response, on February 26, 2020, Ms. Barber, Mayor Witt, Mr. Scott, and Mr. Mills asked the Kaysville City Police Chief to pursue criminal charges (see here). In response, the Police Chief wisely asked the County Attorney's Office to look into this because of the obvious conflicts of interest. The county declined to prosecute. In the county's Declined Prosecution Statement, they noted "Mr. Sanders, as anyone, has a legal right to file a lawsuit. His indicating he may do so as part of an aggressive (even hostile) negotiation position would not normally satisfy the burden under the statute to prove the threat constitute a threat to harm the public servant or entity on its face."

On February 28, 2020, a few days after we heard the city had been served for this OMA lawsuit, Ms. Barber, after consultation with the City Attorney, filed the ethics complaint with the Utah State Bar Association stating I had committed "political extortion". It appears, Ms. Barber had been telling Mr. Scott as early as January 10, 2020, that she had already filed the ethics complaint (she hadn't) and that they were working together as city officials on the criminal charges.

I'm an attorney, and to this day, I still don't understand why they think any kind of extortion took place and neither does the County Attorney's office. Political extortion usually occurs when a politician uses her government position to grant favors in exchange for money. As the State Bar Association noted in their letter declining to investigate, I was simply notifying Ms. Barber of my viewpoint and future plans. This is not extortion. I'm free to communicate my future intentions as I wish.

Indeed, if telling people in advance you will take some action is considered extortion, then our government commits extortion all the time. Following Ms. Barber's logic, every statute that proscribes a punishment for taking some action would then be extortion. If you drive faster than the speed limit, the government says the police will ticket you. Extortion! If you build your shed too close to your property boundaries, the city tells us you will be fined for a zoning violation. Extortion! If you don't pay your taxes, the federal government tells us, you will be fined or jailed. Extortion! Even the filing of a patent or a trademark would be

considered extortion because these outline the parameters of a potential infringement: if you build this patented thing, you will be sued. Extortion! I could go on and on.

It appears this all started with Jordan Stephenson. He wrote a memo documenting his understanding of what occurred in the meeting on November 6, 2019. In this memo, he concluded, "I believe that this threat crossed the line of ethical boundaries and potentially legal boundaries. I do not believe that a perceived violation should be used as leverage to extort a sitting council member into taking action that serve one individual's or group's interest." It appears all this started because Mr. Stephenson, an accountant, felt legal and ethical boundaries were crossed. I would hope when accounting issues come up, the city confers with people like Mr. Stephenson. But when legal or ethical issues arise, I would hope the city would confer with similar experts, not an accountant.

It's quite clear no extortion occurred.

Of course, I'm glad two independent third parties found Ms. Barber's allegations so meritless they wouldn't even investigate. But I can't decide if I should be scared or laugh that these allegations were made. Mostly I'm disheartened. It's sad when someone gets a little authority, she feels like they have some dominion over others, and she uses that authority to her personal advantage. I guess Ms. Barber is more like Mayor Witt than I previously thought.

I'm also astonished at the amateurism of the people involved. The city attorney, Nic Mils, should have known better. And so should have the city manager, Shayne Scott. After all, it's their job to safeguard Kaysville City and the city council. But they were also placed in a very difficult position. After all, Ms. Barber is their boss. It's no wonder my repeated requests for information about this incident under the GRAMA laws were repeatedly denied by the city until I appealed these requests to the state. These correspondences don't make them

look very good. It was unfair and probably unethical for her to put them in such a compromising position.

All of this is quite petty.

And it brings up a number of important questions.

One question is whether Ms. Barber misappropriated city resources by using the Kaysville City attorney, Mr. Mills, for personal legal advice. Ms. Barber filed the ethics complaint as a citizen. She used her personal contact information and does not use city letterhead. And she was not authorized by the city council to file such a complaint on behalf of the city or the city council. In her letter she admits she received legal advice from Mr. Mills about filing the ethics complaint. And within minutes of filing the complaint, she reported the filing to Mr. Mills (see below). Using the city attorney for personal legal advice is a misappropriation of city resources. It's the same thing as if she had borrowed the city truck to transport personal items. It makes me wonder how often the city attorney gives city council leaders free legal advice?

It is also likely unethical for Mr. Mills to represent both the city and a city council member at the same time. The Utah Supreme Court has made it clear that city attorneys represent the city, not the city council nor individual council members. He's paid by the city to represent the city's interest not city council member's interests. In addition, there could be situations where Mr. Mills is required to give the city legal advice that could be adverse to Ms. Barber and vice versa. Yet, if he represents Ms. Barber, he cannot do so, he's in an ethical pickle!

Furthermore, using one's position as a city council member or as the mayor to ask the police chief to investigate a political opponent is an abuse of power. Using the police to silence a political opponent is the kind of abuse of power that happens in authoritarian regimes (Mr. Putin approves!) not nice neighborhoods like Kaysville. To me, this is the scariest part.

The city council has a code of conduct. One provision requires them to comply with all laws including those around “open processes of government; and City policies and procedures.” Another section states the “personal conduct of Members must be above reproach and avoid even the appearance of impropriety.” It goes on to say, members shall refrain from “personal charges” upon the character or motives of members of the public. My character and motives have been attacked, personal charges have been made, and the appearance of impropriety has not been avoided.

Lastly, and probably the most serious concern, what would have happened if the city would have done this to someone without the support and resources that I have? I’m blessed to have the resources to hire an attorney to clear my name of these stupid allegations. I’m also lucky enough to be an attorney and can see these attacks for what they are. I’m also blessed to have the support of family, close friends, and the Sons of Kaysville during such circumstances. But imagine the consequences to someone else, with less resources, and less support. The results could be tragic! Imagine if this had happened to you?

So, why did I write this? Well, I want you to know what some of your elected and city officials are doing behind the scenes and how they use their power and influence. It’s been said that character is shown not by what one does when everyone is watching (or by the number of cute selfies posted on Facebook of doing good around town), but by what one does when no one or few are watching. I leave it to you to judge.

. . .

Here’s the ethics complaint filed by Ms. Barber along with the letter sent to me by the bar association.

Here’s the letter I filed in response to Ms. Barber’s complaint along with some attachments.

Here's the Bar Associations response declining to investigate Ms. Barber's complaint.

Here's the email chain and report from the County Investigator.

And the County's statement declining prosecution.

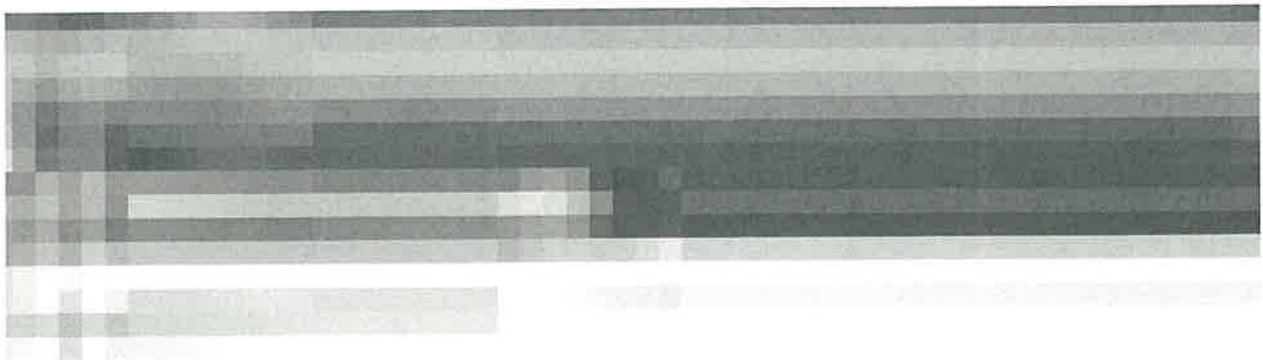
The January correspondence.

Also, while we are at it, here's an email from Ms. Barber to someone in the Parks and Rec Department, which she oversees, thanking them for giving her extra Jazz tickets. Nice perk!

Also, note here, that Ms. Barber was getting ready to take the mayoral reins after the kerfuffle earlier this year with Mayor Witt.

. . .

Here's the email Ms. Barber sent to Mr. Mills after filing the complaint.

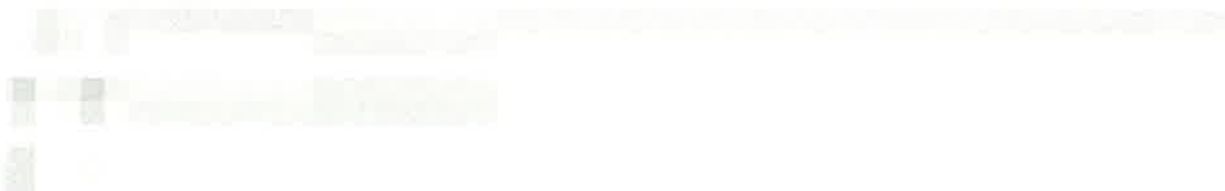
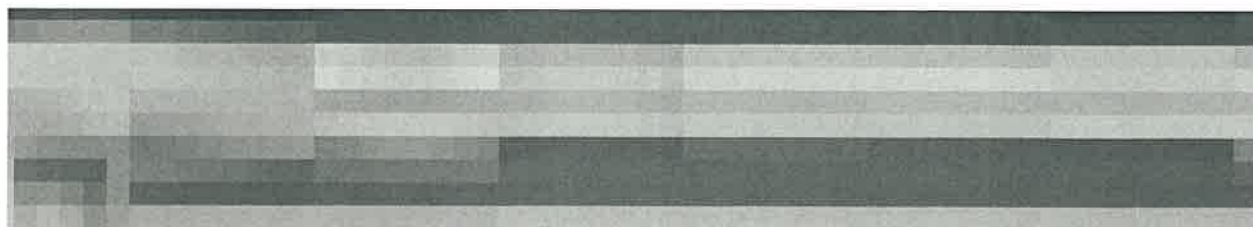


Here's the attachment written by Jordan Stephenson referred to in Ms. Barber's email. From my reading, it looks like this document started the whole extortion mess. Also note that much of this memo is recited verbatim in Ms. Barber's complaint yet written in the first person.

• • •

Below is the email chain between the Police Chief to Ms. Barber, Ms. Witt, Mr. Scott, and Mr. Mills describing why he will not be handling the "extortion matter we discussed last night" and stating the county will look into it. It's impressive how the police chief wisely side stepped a potential political bomb. He punted to the county to allow the county to decline to investigate rather than let down his bosses. I feel bad he was put in this position.

I love Ms. Barber's perky response to bringing the police power against an opponent: "Thank you for doing this chief." Is this a "thank you" for doing a political favor to one of the police chief's bosses, a city council member? Sure looks like it.



...

Here's a letter I wrote to the city council prior to knowing about the criminal allegations.

And here's an email I sent to the council after discovering that criminal allegations were also raised.

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TAB 2



Utah State Bar

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Although not members of the Committee, John Baldwin and Lauren Stout can be contacted for assistance:

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Lauren Stout, CPA
Director of Finance for the Utah State Bar
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October 5, 2020

Board of Commissioners
Utah State Bar
645 South 200 East, Suite 310
Salt Lake City, UT 84111

Dear Board Members:

We have audited the financial statements of the Utah State Bar (the Bar) as of June 30, 2020 and for the year then ended (fiscal year 2020), together with summarized financial information as of and for the year ended June 30, 2019, and have issued our report thereon dated October 5, 2020. Professional standards require that we provide you with information about our responsibilities under auditing standards generally accepted in the United States of America, as well as certain information related to the planned scope and timing of our audit. We have communicated such information in our letter to you dated July 27, 2020. Professional standards also require that we communicate to you the following information related to our audit.

Qualitative Aspects of Accounting Policies and Practices

Management is responsible for the selection and use of appropriate accounting policies. The significant accounting policies used by the Bar are described in Note 1 to the financial statements. No new accounting policies were adopted that had a significant impact on financial reporting and the application of existing policies was not changed during fiscal year 2020.

We noted no transactions entered into by the Bar during fiscal year 2020 for which there is a lack of authoritative guidance or consensus. All significant transactions have been recognized in the financial statements in the proper year.

Accounting estimates are an integral part of the financial statements prepared by management and are based on management's knowledge and experience about past and current events and assumptions about future events. Certain accounting estimates are particularly sensitive because of their significance to the financial statements and because of the possibility that future events affecting them may differ significantly from those expected. The most sensitive estimates affecting the financial statements are as follows:

Management estimates the economic useful lives of property and equipment based on the expected number of years the assets will be used. Management revisits these assumptions annually and adjusts the economic useful lives if warranted.

We evaluated the key factors and assumptions used to develop the estimates above in determining that they are reasonable in relation to the financial statements as a whole.

The financial statement disclosures are neutral, consistent and clear.

Difficulties Encountered in Performing the Audit

We encountered no significant difficulties in performing and completing the audit.

Corrected and Uncorrected Misstatements

Professional standards require us to accumulate all known and likely misstatements identified during the audit, other than those that are trivial, and communicate them to the appropriate level of management. We identified one adjustment to reclassify \$160,670 of accounts receivable to undeposited funds and one adjustment to record \$38,739 of grant income. There were no other adjustments proposed by us during the audit.

Disagreements with Management

For purposes of this letter, professional standards define a disagreement with management as a financial accounting, reporting, or auditing matter, whether or not resolved to our satisfaction, that could be significant to the financial statements or the auditors' report. No such disagreements arose during the course of the audit.

Management Representations

We have requested certain representations from management that are included in the management representation letter dated October 5, 2020. A copy of that letter has been provided to you.

Management Consultations with Other Independent Accountants

Management may decide to consult with other accountants about auditing and accounting matters, similar to obtaining a "second opinion" in certain situations. If a consultation involves application of an accounting principle to the Bar's financial statements or a determination of the type of auditors' opinion that may be expressed on those financial statements, professional standards require the consulting accountant to check with us to determine that the consultant has all the relevant facts. To our knowledge, there were no such consultations with other accountants.

Other Audit Findings or Issues

We generally discuss a variety of matters, including the application of accounting principles and auditing standards, with management prior to retention as the Bar's auditors. These discussions occurred in the normal course of our professional relationship and our responses were not a condition to our retention.

Independence

Independence is crucial to the performance of audit services. We are subject to the independence standards of the American Institute of Certified Public Accountants.

All partners and employees of our firm are provided access to our policies and procedures relating to independence and conflicts of interest. Annually, we obtain written confirmation from partners and employees about their adherence to these policies.

There are no relationships between Tanner LLC and the Bar that in our professional judgment may reasonably be thought to impair our independence.

Other Information in Documents Containing Audited Financial Statements

We are not aware of any other documents containing the audited financial statements. Our responsibility for other information included in documents containing the Bar's audited financial statements and auditors' report does not extend beyond the financial information identified in the report. We have no responsibility for determining whether such other information is properly stated. However, if such documents were to be published, we would have a responsibility to determine that such financial information was not materially inconsistent with information, or the manner of its presentation, appearing in the financial statements.

Other Matter

With respect to the supplemental schedules accompanying the financial statements, we made certain inquiries of management and evaluated the form, content, and methods of preparing the information to determine that the information complies with accounting principles generally accepted in the United States of America, the method of preparing it has not changed from the prior year, and the information is appropriate and complete in relation to our audit of the financial statements. We compared and reconciled the supplemental schedules to the underlying accounting records used to prepare the financial statements or to the financial statements themselves.

We will be pleased to respond to any questions you have about the foregoing. We appreciate the opportunity to continue to be of service to the Bar.

This information is intended solely for the use of the Board of Commissioners, and is not intended to be and should not be used by anyone else.

Sincerely,

Tanner LLC

By: 
Nina Quarequio, Partner



TANNER

BUSINESS ADVISORS AND
CERTIFIED PUBLIC ACCOUNTANTS

19

CRITICAL KNOWLEDGE



PROACTIVE INSIGHT

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Utah State Bar

**Financial Statements and Supplemental Schedules
As of and for the Year Ended June 30, 2020
(with Summarized Financial Information
as of and for the Year Ended June 30, 2019)**

Together with Independent Auditors' Report



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INDEPENDENT AUDITORS' REPORT

To the Board of Commissioners of the Utah State Bar

Report on the Financial Statements

We have audited the accompanying financial statements of the Utah State Bar (a nonprofit organization) (the Bar), which comprise the statement of financial position as of June 30, 2020, the related statements of activities and cash flows for the year then ended, and the related notes to financial statements.

Management's Responsibility for the Financial Statements

Management is responsible for the preparation and fair presentation of these financial statements in accordance with accounting principles generally accepted in the United States of America; this includes the design, implementation, and maintenance of internal control relevant to the preparation and fair presentation of financial statements that are free from material misstatement, whether due to error or fraud.

Auditors' Responsibility

Our responsibility is to express an opinion on these financial statements based on our audit. We conducted our audit in accordance with auditing standards generally accepted in the United States of America. Those standards require that we plan and perform the audit to obtain reasonable assurance about whether the financial statements are free from material misstatement.

An audit involves performing procedures to obtain audit evidence about the amounts and disclosures in the financial statements. The procedures selected depend on the auditors' judgment, including the assessment of the risks of material misstatement of the financial statements, whether due to error or fraud. In making those risk assessments, the auditors consider internal control relevant to the Bar's preparation and fair presentation of the financial statements in order to design audit procedures that are appropriate in the circumstances, but not for the purpose of expressing an opinion on the effectiveness of the Bar's internal control. Accordingly, we express no such opinion. An audit also includes evaluating the appropriateness of accounting policies used and the reasonableness of significant accounting estimates made by management, as well as evaluating the overall presentation of the financial statements.

We believe that the audit evidence we have obtained is sufficient and appropriate to provide a basis for our audit opinion.

Opinion

In our opinion, the financial statements referred to above present fairly, in all material respects, the financial position of the Bar as of June 30, 2020, and the changes in its net assets and its cash flows for the year then ended, in accordance with accounting principles generally accepted in the United States of America.

Report on Summarized Comparative Information

We have previously audited the Utah State Bar's 2019 financial statements and we expressed an unmodified opinion on those financial statements in our report dated September 25, 2019. In our opinion, the summarized comparative information presented herein as of June 30, 2019 and for the year then ended is consistent, in all material respects, with the audited financial statements from which it was derived.

Report on Supplemental Schedules

Our audit was conducted for the purpose of forming an opinion on the financial statements as a whole. The supplemental schedules of continuing legal education and conferences revenue and expenses, member services revenues and expenses, public services revenues and expenses, bar sections revenues and expenses, mandatory continuing education advisory board, and facilities revenues and expenses are presented for the purpose of additional analysis and are not a required part of the financial statements. These schedules are the responsibility of the Bar's management and are derived from and relate directly to the underlying accounting and other records used to prepare the financial statements. Such schedules have been subjected to the auditing procedures applied in our audit of the financial statements and certain additional procedures, including comparing and reconciling such schedules directly to the underlying accounting and other records used to prepare the financial statements or to the financial statements themselves, in accordance with auditing standards generally accepted in the United States of America. In our opinion, such schedules are fairly stated in all material respects in relation to the financial statements as a whole.

Tanner LLC

October 5, 2020

UTAH STATE BAR
Statement of Financial Position

As of June 30, 2020
(with Summarized Financial Information as of June 30, 2019)

	Bar Operations	Bar Sections	Client Security Fund	Mandatory Continuing Legal Education Fund	Total 2020	Total 2019
Assets						
Current assets:						
Cash and cash equivalents	\$ 2,591,537	\$ 466,427	\$ 152,862	\$ 353,736	\$ 3,564,562	\$ 5,690,315
Investments, at fair value	4,449,071	444,672	122,389	362,134	5,378,266	3,786,307
Receivables	62,173	-	-	50	62,223	42,186
Prepaid expenses	94,743	-	-	-	94,743	167,371
Total current assets	7,197,524	911,099	275,251	715,920	9,099,794	9,666,179
Property and equipment, net	1,247,286	-	-	14,797	1,262,083	1,425,174
Total assets	\$ 8,444,810	\$ 911,099	\$ 275,251	\$ 730,717	\$10,361,877	\$11,091,353
Liabilities and Net Assets						
Current liabilities:						
Accounts payable and accrued liabilities	\$ 695,199	\$ 14,115	\$ 1,236	\$ 649	\$ 711,199	\$ 691,493
Deferred revenue	2,363,207	-	-	-	2,363,207	2,846,714
Current portion of capital lease obligation	3,892	-	-	-	3,892	3,683
Interfund advance	(125,313)	49,679	-	75,634	-	-
Total current liabilities	2,936,985	63,794	1,236	76,283	3,078,298	3,541,890
Capital lease obligation, net of current portion	4,112	-	-	-	4,112	8,003
Total liabilities	2,941,097	63,794	1,236	76,283	3,082,410	3,549,893
Commitments and contingencies (Notes 6, 8, 9 and 11)						
Net assets:						
Net assets without donor restrictions - undesignated	3,033,672	-	-	-	3,033,672	3,211,628
Net assets without donor restrictions - board designated	2,431,302	847,305	274,015	654,434	4,207,056	4,274,613
Total net assets without donor restrictions	5,464,974	847,305	274,015	654,434	7,240,728	7,486,241
Net assets with donor restrictions	38,739	-	-	-	38,739	55,219
Total net assets	5,503,713	847,305	274,015	654,434	7,279,467	7,541,460
Total liabilities and net assets	\$ 8,444,810	\$ 911,099	\$ 275,251	\$ 730,717	\$10,361,877	\$11,091,353

See accompanying notes to financial statements.

UTAH STATE BAR
Statement of Activities

For the Year Ended June 30, 2020
(with Summarized Financial Information for the Year Ended June 30, 2019)

	Bar Operations	Bar Sections	Client Security Fund	Mandatory Continuing Legal Education Fund	Total 2020	Total 2019
Changes in net assets without donor restrictions:						
Revenues:						
Licensing	\$ 4,518,363	\$ -	\$ -	\$ -	\$4,518,363	\$4,391,838
Admissions	388,725	-	-	-	388,725	416,220
New lawyer training program	53,850	-	-	-	53,850	66,349
Office of Professional Conduct	13,646	-	-	-	13,646	33,333
Continuing legal education and conferences	690,687	-	-	-	690,687	1,044,783
Member services	197,239	-	-	-	197,239	257,330
Public services	14,589	-	-	-	14,589	13,435
Bar sections	-	427,432	-	-	427,432	425,142
Client Security Fund	-	-	26,131	-	26,131	47,313
Mandatory Continuing Legal Education Fund	-	-	-	296,698	296,698	332,117
Facilities	64,863	(37,783)	-	(7,713)	19,367	30,276
In-kind and interfund	21,143	37,783	-	7,713	66,639	95,471
Net investment income	181,985	-	4,941	13,868	200,794	209,575
Total revenues	6,145,090	427,432	31,072	310,566	6,914,160	7,363,182
Net assets released from restrictions	55,219	-	-	-	55,219	-
Total revenues and reclassifications	\$ 6,200,309	\$427,432	\$ 31,072	\$ 310,566	\$6,969,379	\$7,363,182

See accompanying notes to financial statements.

UTAH STATE BAR
Statement of Activities
Continued
For the Year Ended June 30, 2020
(with Summarized Financial Information for the Year Ended June 30, 2019)

	Bar Operations	Bar Sections	Client Security Fund	Mandatory Continuing Legal Education Fund	Total 2020	Total 2019
Changes in net assets without donor restrictions (continued):						
Expenses:						
Licensing	\$ 134,680	\$ -	\$ -	\$ -	\$ 134,680	\$ 101,711
Admissions	531,721	-	-	-	531,721	480,120
New lawyer training program	83,317	-	-	-	83,317	47,233
Office of Professional Conduct	1,493,054	-	-	-	1,493,054	1,425,811
Continuing legal education and conferences	859,720	-	-	-	859,720	905,571
Member services	603,799	-	-	-	603,799	608,086
Public services	517,911	-	-	-	517,911	440,404
Bar sections	-	248,554	-	-	248,554	266,924
Client Security Fund	-	-	31,333	-	31,333	55,252
Mandatory Continuing Legal Education Fund	-	-	-	355,546	355,546	326,922
Bar operations	1,822,772	-	-	-	1,822,772	1,660,618
Facilities	465,846	-	-	-	465,846	511,556
In-kind and interfund	21,143	37,783	-	7,713	66,639	95,469
Total expenses	6,533,963	286,337	31,333	363,259	7,214,892	6,925,677
Increase (decrease) in net assets without donor restrictions	(333,654)	141,095	(261)	(52,693)	(245,513)	437,505
Change in net assets with donor restrictions:						
Grant revenue	38,739	-	-	-	38,739	55,219
Net assets released from restrictions	(55,219)	-	-	-	(55,219)	-
Increase (decrease) in net assets with donor restrictions	(16,480)	-	-	-	(16,480)	55,219
Increase (decrease) in net assets	(350,134)	141,095	(261)	(52,693)	(261,993)	492,724
Net assets:						
Beginning of the year	5,853,847	706,210	274,276	707,127	7,541,460	7,048,736
End of the year	\$ 5,503,713	\$847,305	\$274,015	\$ 654,434	\$7,279,467	\$7,541,460

See accompanying notes to financial statements.

UTAH STATE BAR
Statement of Cash Flows

For the Year Ended June 30, 2020
(with Summarized Financial Information for the Year Ended June 30, 2019)

	Bar Operations	Bar Sections	Client Security Fund	Mandatory Continuing Legal Education Fund	Total 2020	Total 2019
Cash flows from operating activities:						
Change in net assets	\$ (350,134)	\$ 141,095	\$ (261)	\$ (52,693)	\$ (261,993)	\$ 492,724
Adjustments to reconcile change in net assets to net cash provided by (used in) operating activities:						
Depreciation and amortization	200,810	-	-	9,990	210,800	246,048
Net unrealized (gains) losses on investments	(35,044)	(3,767)	(988)	(3,022)	(42,821)	(27,399)
Loss on disposal of assets	5,673	-	-	-	5,673	-
Changes in assets and liabilities:						
Receivables	(19,987)	-	-	(50)	(20,037)	(30,390)
Prepaid expenses	72,628	-	-	-	72,628	(70,639)
Accounts payable and accrued liabilities	8,727	14,114	1,236	(4,371)	19,706	100,346
Deferred revenue	(483,507)	-	-	-	(483,507)	22,072
Interfund advance	(76,184)	23,685	-	52,499	-	-
Net cash provided by (used in) operating activities	(677,018)	175,127	(13)	2,353	(499,551)	732,762
Cash flows from investing activities:						
Purchases of property and equipment	(48,356)	-	-	(5,024)	(53,380)	(168,425)
Purchases of investments	(5,469,144)	(460,220)	(131,202)	(378,573)	(6,439,139)	(5,063,702)
Proceeds from sale of investments and reinvested income	4,580,000	120,000	30,000	140,000	4,870,000	6,019,576
Net cash provided by (used in) investing activities	(937,500)	(340,220)	(101,202)	(243,597)	(1,622,519)	787,449
Cash flows from financing activities:						
Payments on capital lease obligation	(3,683)	-	-	-	(3,683)	(3,485)
Net increase (decrease) in cash and cash equivalents	(1,618,201)	(165,093)	(101,215)	(241,244)	(2,125,753)	1,516,726
Cash and cash equivalents as of beginning of the year	4,209,738	631,520	254,077	594,980	5,690,315	4,173,589
Cash and cash equivalents as of end of the year	\$2,591,537	\$ 466,427	\$ 152,862	\$ 353,736	\$3,564,562	\$5,690,315

See accompanying notes to financial statements.

UTAH STATE BAR
Statement of Cash Flows
Continued
For the Year Ended June 30, 2020
(with Summarized Financial Information for the Year Ended June 30, 2019)

	<u>Bar Operations</u>	<u>Bar Sections</u>	<u>Client Security Fund</u>	<u>Mandatory Continuing Legal Education Fund</u>	<u>Total 2020</u>	<u>Total 2019</u>
Supplemental disclosure of cash flow information:						
Cash paid for interest	\$ 573	\$ -	\$ -	\$ -	\$ 573	\$ 573

See accompanying notes to financial statements.



1. **Description of Organization and Summary of Significant Accounting Policies**

Description of Organization

The Utah State Bar (the Bar) is an organization created by statute in 1931 under the laws of the state of Utah. The Bar's purpose was amended and clarified by the Utah State Constitution and by court order on June 30, 1981, and the Bar was incorporated as a 501(c)(6) organization on June 24, 1991. All attorneys licensed under the laws of the state of Utah, which approximate 13,100, are considered members of the Bar.

Basis of Presentation and Fund Accounting

The assets, liabilities and net assets of the Bar have been prepared in accordance with accounting principles generally accepted in the United States of America (US GAAP), which require the Bar to report information regarding its financial position and activities according to the following net asset classifications, as applicable:

Net assets without donor restrictions: Net assets that are not subject to donor-imposed restrictions and may be expended for any purpose in performing the primary objectives of the Bar. These net assets may be used at the discretion of the Bar's management and Board of Directors.

Net assets with donor restrictions: Net assets subject to restrictions imposed by donors and grantors. Some donor restrictions are temporary in nature; those restrictions will be met by actions of the Bar or by the passage of time. Other donor restrictions are perpetual in nature, where the donor stipulates the funds be maintained in perpetuity.

Net assets without donor restrictions are presented as designated or undesignated. The undesignated fund is used for the general operations of the Bar. The designated funds are used for activities of the various Bar sections, the Client Security Fund, and the Mandatory Continuing Legal Education Fund (MCLE Fund), including overhead charges to defray the costs of administering those funds.

The financial statements include prior-year summarized comparative information in total but not by net asset class. Such information does not include sufficient detail to constitute a presentation in accordance with US GAAP. Accordingly, such information should be read in conjunction with the Bar's financial statements as of and for the year ended June 30, 2019, from which the summarized information was derived.



1. Description of Organization and Summary of Significant Accounting Policies
Continued

Concentrations of Risk

The Bar maintains cash in bank deposit accounts which, at times, exceed federally insured limits. As of June 30, 2020, the Bar had \$639,601 of cash that exceeded federally insured limits. Additionally, as of June 30, 2020, the Bar maintained cash and cash equivalents of \$2,513,668 in an institutional investment account which is not federally insured. To date, the Bar has not experienced a loss or lack of access to its invested cash and cash equivalents; however, no assurance can be provided that access to the Bar's invested cash and cash equivalents will not be impacted by adverse conditions in the financial markets.

Use of Estimates in Preparing Financial Statements

The preparation of financial statements in accordance with US GAAP requires management to make estimates and assumptions that affect the reported amounts and disclosures. Accordingly, actual results could differ from those estimates.

Cash Equivalents

The Bar considers all highly liquid investments purchased with original maturities to the Bar of three months or less to be cash equivalents. As of June 30, 2020, these cash equivalents consisted of money market accounts totaling \$2,513,668.

Investments

Investments consist primarily of corporate bonds. Investments are reported at their fair values in the statement of financial position. Realized and unrealized gains or losses are reflected currently in the statement of activities.

Property and Equipment

Property and equipment are stated at cost less accumulated depreciation and amortization. Depreciation and amortization are calculated using the straight-line method over the estimated economic useful lives of the assets or over the related lease terms (if shorter), as follows:

Building	25 years
Building improvements	10-25 years
Computers and computer software	3-5 years
Office furniture, equipment and leased equipment	3-7 years



1. Description of Organization and Summary of Significant Accounting Policies
Continued

Property and Equipment – continued

Expenditures for routine maintenance and repairs are charged to operating expenses as incurred. Major renewals and betterments are capitalized and depreciated over their estimated useful lives. Upon retirement or other disposition of property and equipment, the cost and accumulated depreciation and amortization are removed from the accounts and any gain or loss is recorded as income or expense in the statement of activities.

Revenue Recognition and Deferred Revenue

The Bar recognizes revenue from services and programs, conventions, bar examinations, room rental and catering and other services at the time of sale or at the time services are provided. Licensing fees are assessed in June for the following fiscal year. All fees collected prior to the current fiscal year-end are recorded as deferred revenue. Deferred revenue is recognized as income in the year in which it is earned (i.e., benefits provided to members).

Grant Revenue

Grants received are recorded as with or without donor restrictions, depending on the existence and/or nature of any donor restrictions. Revenue from grants with a measurable performance or other barrier, and a right of return, are not recognized until the conditions on which they depend have been substantially met.

If a donor restriction expires in the same reporting period in which the grant revenue was initially recognized, that revenue is reported as an increase in net assets without donor restriction. All other donor-restricted revenue is reported as an increase in net assets with donor restrictions. When a restriction expires (that is, when a stipulated time restriction ends or purpose restriction is accomplished), net assets with donor restrictions are reclassified to net assets without donor restrictions and reported in the statement of activities as net assets released from restrictions.

Income Taxes

On June 24, 1991, the Bar was incorporated as a 501(c)(6) organization and has received a determination letter from the Internal Revenue Service exempting the Bar from federal income taxes. Management believes that the Bar is designed and operated in compliance with the applicable requirements of the Internal Revenue Code and, accordingly, no provision for federal and state income taxes has been provided for in the accompanying statement of activities.

The Bar is subject to income tax at current corporate rates on net income from unrelated business activities. Income taxes on unrelated business activities have not been significant. The Bar paid no income taxes for the year ended June 30, 2020.



UTAH STATE BAR
Notes to Financial Statements
Continued
June 30, 2020

1. Description of Organization and Summary of Significant Accounting Policies
Continued

Income Taxes – continued

A liability for uncertain tax positions is recognized in the financial statements when it is more likely than not the position will not be sustained upon examination by the tax authorities. As of June 30, 2020, the Bar had no uncertain tax positions that qualified for either recognition or disclosure in the financial statements. The Bar is subject to routine audits by tax jurisdictions; however, there are no audits for any tax periods in progress.

Subsequent Events

Management has evaluated events occurring subsequent to June 30, 2020 through October 5, 2020 (the date the financial statements were available to be issued) for possible disclosures or accounting impact.

2. Liquidity and Availability

Financial assets available for general expenditure, that is, without donor or other restrictions limiting their use, within one year of the date of the statement of financial position, comprise the following as of June 30, 2020:

Cash and cash equivalents	\$ 3,564,562
Investments	5,378,266
Receivables	<u>62,223</u>
	<u>9,005,051</u>
Less amounts not available to be used within one year or otherwise restricted:	
Board designated funds	(4,207,056)
Donor restricted funds	<u>(41,739)</u>
	<u>\$ 4,756,256</u>

The Bar regularly monitors liquidity required to meet its operating needs and other contractual commitments using budgets and cash flow projections, while also striving to maximize the investment of its available funds. The Bar's excess cash is invested in a portfolio of corporate bonds. Additionally, the Bar's governing board has designated a portion of its unrestricted resources for contingencies, which is identified as board-designated in the table above (Note 8).



UTAH STATE BAR
Notes to Financial Statements
Continued
June 30, 2020

3. Investments and Net Investment Income

Investments consisted of the following as of June 30, 2020:

	Amortized Cost	Cumulative Net Unrealized Gains	Fair
Corporate bonds	\$ 5,298,114	\$ 80,152	\$ 5,378,266

Investment income for the year ended June 30, 2020, consisted of the following:

	Undesignated	Designated	Total
Net investment income and interest	\$ 149,077	\$ 15,980	\$ 165,057
Net unrealized gain/(loss)	32,908	2,829	35,737
	\$ 181,985	\$ 18,809	\$ 200,794

4. Fair Value Measurements

The Bar's financial instruments consist of investments as of June 30, 2020. Management believes that the recorded value of each financial instrument approximates its fair value.

Fair value is defined as the price that would be received to sell an asset or paid to transfer a liability in an orderly transaction between market participants at the measurement date. To increase the comparability of fair value measures, the following hierarchy prioritizes the inputs to valuation methodologies used to measure fair value:

Level 1	Valuations based on quoted prices for identical assets or liabilities in active markets
Level 2	Valuations based on observable inputs other than quoted prices included in Level 1, such as quoted prices for similar assets or liabilities in active markets, quoted prices for identical or similar assets and liabilities in markets that are not active, or other inputs that are observable or can be corroborated by observable market data.
Level 3	Valuations based on unobservable inputs reflecting the Bar's own assumptions, applied consistently with reasonably available assumptions made by other market participants. These valuations require significant judgment.



UTAH STATE BAR
Notes to Financial Statements
Continued
June 30, 2020

4. Fair Value Measurements
Continued

The Bar's investments are considered Level 1 assets under the fair value hierarchy and are measured on a recurring basis. Bar management obtains valuation data for the corporate bonds from third-party sources, which determine the net asset values for the Bar's accounts using quoted market prices and reportable trades.

5. Property and Equipment

Property and equipment consisted of the following as of June 30, 2020:

Building and building improvements	\$ 3,035,850
Computers and computer software	821,359
Office furniture, equipment and leased equipment	821,281
Land	<u>633,142</u>
	5,311,632
Less accumulated depreciation and amortization	<u>(4,049,549)</u>
Property and equipment, net	<u>\$ 1,262,083</u>

Depreciation and amortization expense for property and equipment totaled \$210,800 for the year ended June 30, 2020

6. Lease Obligation

The Bar leases certain equipment under a capital lease obligation. The lease requires quarterly payments of \$1,064, has an effective interest rate of 16.6%, and is secured by the equipment being leased. As of June 30, 2020, equipment held under the capital lease had a cost of approximately \$18,000 and accumulated amortization of approximately \$13,000. As of June 30, 2020, future minimum lease payments under the capital lease were as follows:

Year Ending June 30:

2021	\$ 4,256
2022	<u>4,256</u>
Total	8,512
Less amount representing interest	<u>(508)</u>
	8,004
Less current portion	<u>(3,892)</u>
	<u>\$ 4,112</u>



UTAH STATE BAR
Notes to Financial Statements
Continued
June 30, 2020

7. Employee Benefit Plans

The Bar sponsors a defined contribution 401(k) plan (the Plan). Employees who have completed one year of service with the Bar and have attained the age of 21 or older are eligible to participate, and may elect to contribute a portion of their compensation, subject to Internal Revenue Code limitations, to the Plan. The Bar contributes to the Plan an amount equal to 10% of the compensation of all Plan participants. Contributions to the Plan were \$277,322 for the year ended June 30, 2020.

The Bar sponsors a Section 125 cafeteria plan. All contributions to this plan are made by the participants.

8. Board Designated Net Assets Without Donor Restrictions

Board designated net assets without donor restrictions consist of the Bar operation's reserves for potential future liabilities and assets designated for Bar sections, client security fund, and the mandatory continuing legal education fund. Board designated net assets without donor restrictions consisted of the following as of June 30, 2020:

Bar operations reserves:	
Three-month operating expense reserve	\$ 1,581,302
Capital replacement reserve – building	650,000
Capital replacement reserve – equipment	<u>200,000</u>
Total Bar operations reserves	2,431,302
Bar sections	847,305
Client security fund	274,015
Mandatory continuing legal education fund	<u>654,434</u>
	<u>\$ 4,207,056</u>

9. Client Security Fund

On October 30, 1983, the Bar received approval from the Utah Supreme Court (USC) to collect up to \$20 per attorney per year to accumulate a client security fund (the Fund) in the base amount of \$200,000. The Fund was created to partially indemnify the public against losses incurred as a result of lawyers' misappropriation of clients' funds. Claims against the Fund are limited to \$20,000 per claimant. On April 20, 2015, the USC approved the reduction of the fee paid to the Fund by each member attorney from \$20 to \$5. The Bar determined no fee would be collected from member attorneys for the year ended June 30, 2020, as the fund was sufficiently funded.

Cases must be reviewed and approved by the Fund Committee of the Bar and also by the Board of Commissioners of the Bar before they are considered to be claims payable by the Fund. The Fund Committee routinely reviews open matters. In the Fund Committee's opinion, these open matters will not have a material adverse effect on the financial position, results of activities, or liquidity of the Bar.



UTAH STATE BAR
Notes to Financial Statements
Continued
June 30, 2020

**10. Expenses
By Nature
and Function**

The accompanying financial statements include certain expenses that are attributable to both program and supporting functions of the Bar. These expenses include salaries and wages, employee benefits, and supplies and other office expenses, which are allocated based on head count; and depreciation, utilities, and maintenance, which are allocated based on estimated square footage.

Expenses by natural classification for the year ended June 30, 2020 are as follows:

	Program Services									Support Services	Total
	Regulatory	Member Services	Public Services	Education	Building Usage	MCLE	CSF	Sections	In-kind	General & Administrative	
Program	\$ 126,362	\$ 259,867	\$ 154,563	\$ 606,434	\$ 68,728	\$ -	\$ 30,705	\$ 248,554	\$ -	\$ 240,028	\$ 1,735,241
Salaries and benefits	1,724,972	132,999	333,885	169,172	170,935	264,910	-	-	-	1,266,786	4,063,659
General and administrative	300,007	213,302	46,605	91,602	16,761	21,792	628	-	-	273,543	964,240
Overhead and depreciation	106,121	6,588	13,352	14,441	209,422	68,844	-	-	-	52,793	471,561
In-kind and Interfund facilities	(14,690)	(8,957)	(30,494)	(21,929)	-	7,713	-	37,783	21,143	(10,378)	(19,809)
	<u>\$ 2,242,772</u>	<u>\$ 603,799</u>	<u>\$ 517,911</u>	<u>\$ 859,720</u>	<u>\$ 465,846</u>	<u>\$ 363,259</u>	<u>\$ 31,333</u>	<u>\$ 286,337</u>	<u>\$ 21,143</u>	<u>\$ 1,822,772</u>	<u>\$ 7,214,892</u>

11. Contingencies

The Bar may, from time to time, be subject to legal proceedings arising in the normal course of business. Management does not believe the outcome of any matters currently pending will have a material impact on the financial position, results of activities, or liquidity of the Bar.

The COVID-19 pandemic has caused significant business disruption throughout the world. While the disruption is currently expected to be temporary, there is considerable uncertainty around the duration of the disruption. Therefore, the Bar anticipates this matter may negatively impact its operating results. However, the related financial impact and duration cannot be reasonably estimated at this time.

12. Related Parties

The primary purpose of the Bar is to perform services on behalf of its members, which may result in related-party transactions arising through its regular activities.

SUPPLEMENTAL SCHEDULES

UTAH STATE BAR
Schedule of Continuing Legal Education and Conferences
Revenues and Expenses

For the Year Ended June 30, 2020

	Summer Convention	Fall Forum	Spring Convention	CLE Events	Total
Revenues	\$ 215,930	\$ 83,224	\$ 495	\$ 391,038	\$ 690,687
Expenses:					
Program	246,401	64,336	21,228	274,469	606,434
Salaries and benefits	21,359	4,160	11,102	132,551	169,172
General and administrative	14,679	7,100	12,302	71,962	106,043
Interfund facilities	(1,402)	(320)	(1,134)	(19,073)	(21,929)
Total expenses	281,037	75,276	43,498	459,909	859,720
Excess (deficiency) of revenues over expenses	\$ (65,107)	\$ 7,948	\$ (43,003)	\$ (68,871)	\$ (169,033)

UTAH STATE BAR
Schedule of Member Services Revenues and Expenses

For the Year Ended June 30, 2020

	Bar Journal	Member Services	Legislative	Public Education	Young Lawyers Division	Total
Revenues	\$ 176,432	\$ 14,780	\$ -	\$ -	\$ 6,027	\$ 197,239
Expenses:						
Program	34,503	116,116	72,234	6,019	30,995	259,867
Salaries and benefits	40,072	-	5,427	87,500	-	132,999
General and administrative	119,277	-	225	96,696	3,692	219,890
Interfund facilities	(2,967)	-	(5,093)	(737)	(160)	(8,957)
Total expenses	190,885	116,116	72,793	189,478	34,527	603,799
Excess (deficiency) of revenues over expenses	\$ (14,453)	\$ (101,336)	\$ (72,793)	\$ (189,478)	\$ (28,500)	\$ (406,560)

UTAH STATE BAR
Schedule of Public Services Revenues and Expenses

For the Year Ended June 30, 2020

	Committees	Consumer Assistance	Access to Justice	Tuesday Night Bar	Total
Revenues	\$ 214	\$ -	\$ 14,375	\$ -	\$ 14,589
Expenses:					
Salaries and benefits	123,402	-	7,884	23,277	154,563
Program	29,452	127,976	173,099	3,358	333,885
General and administrative	4,992	8,682	44,835	1,448	59,957
Interfund facilities	(4,823)	-	(5,822)	(19,849)	(30,494)
Total expenses	153,023	136,658	219,996	8,234	517,911
Deficiency of revenues over expenses	\$ (152,809)	\$ (136,658)	\$ (205,621)	\$ (8,234)	\$ (503,322)

UTAH STATE BAR

Schedule of Bar Sections Revenues and Expenses

For the Year Ended June 30, 2020

	Balance June 30, 2019	Revenues	Expenses	Balance June 30, 2020	Net Increase (Decrease)
Bar Section Funds:					
Antitrust/Unfair Competition	\$ 10,316	\$ (3,656)	\$ 588	\$ 6,072	\$ (4,244)
Appellate Practice	14,666	11,625	7,145	19,146	4,480
Banking and Finance	6,706	7,175	4,183	9,698	2,992
Bankruptcy	10,026	7,365	5,016	12,375	2,349
Business Law	43,442	23,165	8,965	57,642	14,200
Collection Law	24,833	6,843	1,043	30,633	5,800
Communications Law	3,799	460	161	4,098	299
Constitutional Law	6,194	2,295	1,214	7,275	1,081
Construction Law	7,254	2,816	4,754	5,316	(1,938)
Corporate Counsel	38,377	26,608	6,820	58,165	19,788
Criminal Law	20,764	13,086	8,347	25,503	4,739
Cyber Law	28,118	8,618	5,567	31,169	3,051
Community Association Law	4,055	1,274	378	4,951	896
Cannabis Law	-	1,000	140	860	860
Dispute Resolution	16,801	9,193	3,048	22,946	6,145
Education Law	5,398	2,140	749	6,789	1,391
Elder Law	6,751	7,594	6,918	7,427	676
Entertainment Law	238	9,598	4,426	5,410	5,172
Environmental Law	13,183	1,200	5,470	8,913	(4,270)
Family Law	81,975	54,214	36,434	99,755	17,780
Franchise Law	4,382	990	231	5,141	759
Government/Administrative Law	16,588	10,676	8,243	19,021	2,433
Health Law	16,927	4,670	2,117	19,480	2,553
Intellectual Property	70,160	18,823	16,257	72,726	2,566
International Law	3,664	2,180	1,071	4,773	1,109
Indian Law	3,070	2,295	1,447	3,918	848
Juvenile Law	3,285	2,960	2,009	4,236	951
Labor and Employment Law	18,621	15,332	8,656	25,297	6,676
Legal Entrepreneurs	860	45,097	42,251	3,706	2,846
Litigation	86,201	444	149	86,496	295
Limited Scope	2,112	700	196	2,616	504
Military Law	2,562	904	322	3,144	582
Non-profit/Charitable Law	5,247	2,475	693	7,029	1,782
Probate/Estate Planning	23,014	27,401	19,724	30,691	7,677
Real Property	26,580	42,330	41,414	27,496	916
Securities	33,238	11,189	1,863	42,564	9,326
Senior Lawyers	525	580	252	853	328
Solo, Small Firm, Rural Practice	11,493	8,276	2,464	17,305	5,812
Tax	16,225	12,483	10,703	18,005	1,780
Total Bar Section Funds	687,650	402,418	271,428	818,640	130,990
Paralegal Division	18,560	25,014	14,909	28,665	10,105
	\$ 706,210	\$ 427,432	\$ 286,337	\$ 847,305	\$ 141,095

See Independent Auditors' Report.

UTAH STATE BAR
Schedule of Mandatory Continuing Education Advisory Board

For the Year Ended June 30, 2020

Revenues:	
Compliance fees from attorneys	\$ 173,042
Continuing Legal Education (provider attendance fees)	123,656
Investment income	<u>13,868</u>
Total revenues	<u>310,566</u>
Expenses:	
Salaries, payroll taxes, and benefits	264,910
Office overhead	68,844
Interfund facilities	7,713
Travel	18,371
Board meetings	<u>3,421</u>
Total expenses	<u>363,259</u>
Deficiency of revenues over expenses	<u>\$ (52,693)</u>

UTAH STATE BAR
Schedule of Facilities Revenues and Expenses

For the Year Ended June 30, 2020

Revenues:	
Outside parties	<u>\$ 19,367</u>
In-kind and interfund revenues:	
Interdepartmental charges	92,210
Sections	37,783
Utah Dispute Resolution and other in-kind	17,837
MCLE	<u>7,713</u>
Total in-kind and interfund revenues	<u>155,543</u>
Total revenues	<u>174,910</u>
Expenses:	
Building overhead	209,422
Food, beverage and AV costs	68,728
Salaries and benefits	170,935
General and administrative	<u>16,761</u>
	465,846
In-kind expenses	<u>21,143</u>
Total expenses	<u>486,989</u>
Deficiency of revenues over expenses	<u>\$ (312,079)</u>

Tanner LLC
Key Bank Tower at City Creek
36 South State Street, Suite 600
Salt Lake City, Utah 84111-1400
Telephone 801.532.7444
Fax 801.532.4911
www.tannerco.com

October 5, 2020

Board of Commissioners and Management
Utah State Bar
645 South 200 East, Suite 310
Salt Lake City, UT 84111

Ladies/Gentlemen:

In planning and performing our audit of the financial statements of the Utah State Bar (the Bar) as of June 30, 2020 and for the year then ended, in accordance with auditing standards generally accepted in the United States of America, we considered the Bar's internal control over financial reporting (internal control) as a basis for designing audit procedures that are appropriate in the circumstances for the purpose of expressing an opinion on the financial statements, but not for the purpose of expressing an opinion on the effectiveness of the Bar's internal control. Accordingly, we do not express an opinion on the effectiveness of the Bar's internal control.

Our consideration of internal control was for the limited purpose described in the preceding paragraph and was not designed to identify all deficiencies in internal control that might be material weaknesses or significant deficiencies and, therefore, material weaknesses or significant deficiencies may exist that were not identified. In addition, because of inherent limitations in internal control, including the possibility of management override of controls, misstatements due to error or fraud may occur and not be detected by such controls.

A deficiency in internal control exists when the design or operation of a control does not allow management or employees, in the normal course of performing their assigned functions, to prevent, or detect and correct, misstatements on a timely basis.

A material weakness is a deficiency, or a combination of deficiencies, in internal control, such that there is a reasonable possibility that a material misstatement of the Bar's financial statements will not be prevented, or detected and corrected, on a timely basis.

A significant deficiency is a deficiency, or a combination of deficiencies, in internal control that is less severe than a material weakness, yet important enough to merit attention by those charged with governance.

We consider the following deficiency to be a material weakness:

Segregation of Incompatible Duties in Accounting and Financial Reporting Functions

Internal controls should be designed to safeguard assets and help prevent losses, errors, or fraudulent acts. A fundamental concept in an adequate system of internal control is the segregation of incompatible duties. Proper segregation of incompatible duties dictates that the same individual should be involved in only one of the following functions: authorization, recording, asset custody, and control activities related to a transaction. Finance department users of Clear Vantage, the Company's membership database, have the ability to make and adjust invoices as well as collect cash payments. Additionally, the Financial Administrator has the ability to create journal entries without formal review or approval. We recommend that the Bar review its procedures to ensure that duties are properly segregated between individuals and implement mitigating controls over processes where segregation is not possible.

The following deficiency should be considered as part of the ongoing process of modifying and improving the Bar's internal control practices and procedures over accounting and financial reporting:

Third-Party SOC 1 Reports

The third-party payroll processing company, Intuit, does not have a SOC 1 report. A SOC 1 report provides reasonable assurance that transactions with the third party are captured completely, accurately, and timely. We suggest that management take into consideration whether a third-party provider obtains a SOC 1 report as a criterion in the Bar's selection process for such third-party providers.

This communication is intended solely for the information and use of the Board of Commissioners and management, and is not intended to be and should not be used by anyone other than these specified parties.

Sincerely,

Tanner LLC

By:



Nina Quarequio, Partner



Utah State Bar

645 South 200 East, Suite 310 • Salt Lake City, Utah 84111-3834
 Telephone: 801-531-9077 • Fax: 801-531-0660
<http://www.utahbar.org>

John C. Baldwin
 Executive Director

Board of Bar Commissioners

Heather M. Farnsworth
 President
 Match & Farnsworth
 Salt Lake City

Heather L. Thuet
 President-elect
 Christensen & Jensen
 Salt Lake City

John W. Bradley
 Utah Attorney General's Office
 Ogden

Traci A. Gundersen
 Attorney at Law
 Draper

Rick Hoffman, CPA
 Public Member
 Lone Peak Valuation Group
 Salt Lake City

Chrystal Mancuso-Smith
 Swenson & Shelley
 Salt Lake City

Marty E. Moore
 Peck Hadfield Baxter & Moore
 Logan

Mark O. Morris
 Snell & Wilmer
 Salt Lake City

Andrew M. Morse
 Snow Christensen & Martineau
 Salt Lake City

Shawn Newell
 Public Member
 Waves Enterprises, LLC
 Salt Lake City

Mark W. Pugsley
 Ray Quinney & Nebeker
 Salt Lake City

Michelle Quist
 Kunzler Bean & Adamson
 Salt Lake City

Thomas W. Seiler
 Seiler, Anderson, Fife,
 & Marshall, LC
 Provo

Kristin K. Woods
 Attorney at Law
 St. George

October 5, 2020

Tanner LLC
 Key Bank Tower at City Creek
 36 South State Street, Suite 600
 Salt Lake City, Utah 84111-1400

Attn: Nina Quarequio and Jeremy Heckaman

This representation letter is provided in connection with your audit of the financial statements of the Utah State Bar (the Bar), which comprise the statement of financial position as of June 30, 2020, the related statements of activities and cash flows for the year then ended, and the related notes to the financial statements, for the purpose of expressing an opinion as to whether the financial statements are presented fairly, in all material respects, in accordance with accounting principles generally accepted in the United States of America (US GAAP). This representation letter is also provided in connection with your work on the summarized comparative information presented as of June 30, 2019 and for the year then ended as derived from the related audited financial statements.

Certain representations in this letter are described as being limited to matters that are material. Items are considered material, regardless of size, if they involve an omission or misstatement of accounting information that, in light of surrounding circumstances, makes it probable that the judgment of a reasonable person relying on the information would be changed or influenced by the omission or misstatement. An omission or misstatement that is monetarily small in amount could be considered material as a result of qualitative factors.

We confirm, to the best of our knowledge and belief, as of the date of this letter, the following representations made to you during your audit.

Financial Statements

1. We have fulfilled our responsibilities, as set out in the terms of the audit engagement letter dated July 27, 2020, including our responsibility for the preparation and fair presentation of the financial statements in accordance with US GAAP.
2. The financial statements referred to above are fairly presented in accordance with US GAAP.
3. We acknowledge our responsibility for the design, implementation, and maintenance of internal control relevant to the preparation and fair presentation of financial statements that are free from material misstatement, whether due to error or fraud.

4. We acknowledge our responsibility for the design, implementation, and maintenance of internal control to prevent and detect fraud.
5. Significant assumptions we used in making accounting estimates, including those measured at fair value, are reasonable.
6. Related-party relationships and transactions have been appropriately accounted for and disclosed in accordance with the requirements of US GAAP.
7. No events occurred subsequent to the date of the financial statements and for which US GAAP requires adjustment or disclosure.
8. Material concentrations have been properly disclosed in accordance with US GAAP.
9. There are no guarantees, whether written or oral, under which the Bar is contingently liable.
10. We have complied with all aspects of contractual agreements that would have a material effect on the financial statements in the event of noncompliance.
11. We are in agreement with the adjusting journal entries you have proposed, and they have been posted to the Organization's accounts.
12. There are no arrangements with financial institutions involving compensating balances or other arrangements involving restrictions on cash balances, lines of credit, or similar arrangements.
13. The following information about financial instruments with off-balance-sheet risk and financial instruments with concentrations of credit risk has been properly disclosed in the financial statements:
 - a. The extent, nature, and terms of financial instruments with off-balance-sheet risk;
 - b. The amount of credit risk of financial instruments with off-balance-sheet risk and information about the collateral supporting such financial instruments;
 - c. Significant concentrations of credit risk arising from all financial instruments and information about the collateral supporting such financial instruments.

Information Provided

14. We have provided you with:
 - a. Access to all information, of which we are aware, that is relevant to the preparation and fair presentation of the financial statements, such as records, documentation, and other matters, and all audit or relevant monitoring reports, if any, received from funding sources.
 - b. Additional information that you have requested from us for the purpose of the audit.
 - c. Unrestricted access to persons within the Bar from whom you determined it necessary to obtain audit evidence.
 - d. Minutes of the meetings of the Board of Commissioners and committees of the Board of Commissioners, or summaries of actions of recent meetings for which minutes have not yet been prepared. Any minutes that have not been executed are not expected to have significant changes once approved and executed. A complete list of meetings of the Board of Commissioners from July 1, 2018 through the date of this letter, is set forth below:
 Board of Commissioners: July 18, 2019; August 16, 2019; October 4, 2019; November 8, 2019; December 20, 2019; January 24, 2020; March 12, 2020; June 5, 2020; July 16, 2020 and August 28, 2020

15. All material transactions have been recorded in the accounting records and are reflected in the financial statements.
16. We have disclosed to you the results of our assessment of the risk that the financial statements may be materially misstated as a result of fraud.
17. We have no knowledge of any fraud or suspected fraud that affects the Bar and involves:
 - a. Management,
 - b. Employees who have significant roles in internal control, or
 - c. Others where the fraud could have a material effect on the financial statements.
18. We have no knowledge of any allegations of fraud or suspected fraud affecting the Bar's financial statements communicated by employees, former employees, grantors, regulators, or others.
19. We have no knowledge of any instances of noncompliance or suspected noncompliance with laws, regulations, contracts, grant agreements, or abuse whose effects should be considered when preparing financial statements.
20. We are not aware of any pending or threatened litigation, claims, or assessments or unasserted claims or assessments that are required to be accrued or disclosed in the financial statements in accordance with US GAAP, and we have not consulted a lawyer concerning litigation, claims, or assessments.
21. We have disclosed to you the identity of the Bar's related parties and all the related-party relationships and transactions of which we are aware.
22. The Bar has satisfactory title to all owned assets, and there are no liens or encumbrances on such assets nor has any asset been pledged as collateral.
23. We are responsible for compliance with the laws, regulations, and provisions of contracts and grant agreements applicable to us; and we have identified and disclosed to you all laws, regulations and provisions of contracts and grant agreements that we believe have a direct and material effect on the determination of financial statement amounts or other financial data significant to the audit objectives.
24. The Bar is an exempt organization under Section 501(c)(6) of the Internal Revenue Code. Any activities of which we are aware that would jeopardize the Bar's tax-exempt status, and all activities subject to tax on unrelated business income or excise or other tax, have been disclosed to you. All required filings with tax authorities are up-to-date.
25. We acknowledge our responsibility for presenting the financial statements and supplemental schedules in accordance with US GAAP, and we believe the financial statements, including their form and content, are fairly presented in accordance with US GAAP. The methods of measurement and presentation of the financial statements and supplemental schedules have not changed from those used in the prior year, and we have disclosed to you any significant assumptions or interpretations underlying the measurement and presentation of the financial statements and supplemental schedules.
26. The Bar has no plans or intentions that may materially affect the carrying values or classification of assets and liabilities.

27. There are no other liabilities or gain or loss contingencies that are required to be accrued or disclosed by the *Contingencies* topic of the Financial Accounting Standards Board Accounting Standards Codification.

Other

28. In regards to the nonattest services performed by you, we have—
- a. Made all management decisions and performed all management functions.
 - b. Designated an individual with suitable skill, knowledge, or experience to oversee the services.
 - c. Evaluated the adequacy and results of the services performed.
 - d. Accepted responsibility for the results of the services.
29. There have been no communications from regulatory agencies concerning noncompliance with, or deficiencies in, financial reporting practices.
30. During the course of your audit, you may have accumulated records containing data that should be reflected in our books and records. All such data have been so reflected. Accordingly, we no longer need copies of such records in your possession.

Sincerely,

Utah State Bar



John Baldwin, Executive Director



Lauren Stout, Financial Director

cc: Board of Commissioners

TAB

3

UTAH BAR COMMISSION MEETING AGENDA ITEM

Title: Select Delegate to the ABA

Item # 2.2

Submitted by: John Baldwin

Meeting Date: October 16, 2020

ITEM/ISSUE:

The Utah State Bar Commission is seeking applicants to fill a vacant position as one of the Bar's two representatives in the American Bar Association's (ABA) House of Delegates for a term to run through the August 2022 ABA Annual Meeting. The Bar has one other representatives in the House of Delegates, as well as a representative from the Young Lawyers Division. The ABA Members in Utah also have an elected delegate.

The delegate is expected to attend the ABA's Midyear and Annual meetings and to participate in appropriate interim meetings and in conference calls as needed. There will also be some preparation work to review issues and communicate with and report to the Bar Commission on a regular basis. The delegate also serves as an *ex-officio* member of the Bar Commission and would be expected to attend regular Commission Meetings. The delegate must be an active member in good standing of the Utah State Bar and a member in good standing of the ABA and meet all eligibility requirements set forth by the ABA.

APPLICANTS:

1. Kim Cordova
2. Scott S. Kunkel
3. David E. Leta
4. Paul T. Moxley

INFO ONLY:

DISCUSSION:

ACTION NEEDED: X

KIM CORDOVA

kim@edbrasslaw.com/kimcordova@utah.gov

8018793339

12501 South Fox Run Way

Draper, UT 84020

September 22, 2020

Utah State Bar Commission,

I am writing to express my interest to serve as Utah's representative in the American Bar Association's House of Delegates. I have been a practicing attorney since 2001. I am in good standing with the Bar. I am a member of several legal associations. I served two terms on the ethics committee for the Office of Professional Conduct. I am now the criminal justice policy advisor for the Governor of Utah.

My background gives me the experience to be effective in representing the interests of our State on a national level and understanding the necessity of partnering and collaboration. I have worked both in the government and private sectors. I have daily interactions with stakeholders across the State on issues surrounding the courts and the criminal justice system. I have a unique perspective of both a practicing attorney and a policy maker. My skills would be an asset to both the Utah State Bar and the American Bar Association.

Our legal community is filled with incredibly talented, smart, generous, innovative, committed and hard working individuals. I am quite proud to be a lawyer in this state. From the commissioners to the programs to the diverse legal associations, our Bar is exemplary and I would love the opportunity to contribute to our legal community in any way I can serve. My skill set and experience would be an asset to these organizations. I thank you for your time and consideration.

With Gratitude,

Kim Cordova

KIM CORDOVA

12501 South Fox Run Way, Draper, UT 84020 ♦ Cell (801) 879-3339 ♦ kim@edbrasslaw.com

PERSONAL PROFILE

I thrive in dynamic environments and can quickly adapt to the ever-changing demands of the legal field. I exemplify personal drive, integrity and resilience under difficult circumstances, while striving to cultivate personal and professional relationships.

ACADEMIC PROFILE

University of Utah College of Law

Juris Doctor | 2001

- Graduate Assistant
- Moot Court
- Trial Advocacy Group
- Minority Law Caucus
- Women's Law Caucus

Westminster College

Bachelor of Science Psychology & English | 1995

- Summa Cum Laude
 - Numerous Academic Scholarships
-

BAR STATUS

- Admitted to Utah Bar (9100)
 - Admitted to US District Court, Utah
-

LEGAL EXPERIENCE

Executive Director

Commission on Criminal & Juvenile Justice | 2017 - Present

I advise the Governor and coordinate with various branches of government on criminal and juvenile justice policy. I build and maintain relationships with public, private, and community groups. I present policy implementation to stakeholders throughout the State of Utah and across the country.

I manage a multi-million dollar budget for the agency and grant funding while supervising sixty employees. I provide a mentoring platform to enhance personal and professional growth among employees by coordinating and directing training, education and implementing performance standards.

I oversee the judicial nominating commissions, Indigent Defense Commission, Judicial Performance Evaluation Commission, Sentencing Commission, Utah Office for Victims of Crime, Substance Abuse and Mental Health Advisory Council, Domestic Violence and Sexual Assault, Utah Board of Juvenile Justice and Juvenile Justice and Oversight Committee.

Adjunct Professor- Criminal Process

University of Utah College of Law | 2017 - Present

I develop challenging and engaging curriculum for second and third year law students and provide a space for students to cultivate practical motion experience. I guest lecture on criminal justice issues.

Edward K. Brass, PC

dba Brass & Cordova | 2010 - 2017

I was a managing attorney for the firm and was responsible for all personnel and budgets. I had a high caseload of criminal defense cases with extensive trial experience from misdemeanor cases to complex and serious felonies including three capital homicides.

I gained proficient legal research skills on Westlaw and experience in legal writing and research on numerous issues related to criminal law. I was a skilled negotiator who appeared in court on a daily basis, diligently representing clients in State and Federal court. I tailored representation to each individual client while having the experience and reputation to effectively negotiate with prosecutors and deal with court personnel.

Trial Attorney

Salt Lake County District Attorney's Office | 2001 - 2009

I managed caseload of between 80-120 active clients. I worked exclusively on child sex crimes and homicides from 2005-2009. I worked closely with law enforcement, victim counselors and medical professionals. I represented clients in over 50 jury trials. I participated in all specialty teams within the office including juvenile, drugs, and general felonies.

Law Clerk

Salt Lake County District Attorney's Office | 1999 - 2001

I reviewed discovery, wrote briefs and memoranda in all areas of criminal law including search and seizure, dog sniff, illegal traffic stops, pat downs, Miranda, validity of search warrants, Utah Rules of Evidence 404b issues, child testimony through videos, Confrontation Clause, Miranda, Daubert, Bruton, Giglio, discovery, ex post facto applicability to newly passed laws, eyewitness identification, memory, statute of limitations, severance, motions to quash bind overs after the preliminary hearing, reliability of child witnesses, jury instructions and responses to motions for new trials.

Graduate Assistant

University of Utah College of Law | 2000 - 2001

I mentored first year law students in a program designed to assist students acclimate and succeed in law school. I met with students weekly and worked closely with the law school advisor.

Juvenile Court Probation Officer

Administrative Office of the Courts | 1996 - 1998

I supervised youth under court jurisdiction in the community. I appeared in court and collaborated with families, schools, and community partners to ensure support and compliance.

PROFESSIONAL AFFILIATIONS

U.S. District Court

CJA Panel member | 2011 - 2017

Third District Court Nominating Commission

Member | 2015 - 2018

Neighborhood House

Board Member | 2015 - 2018

The Waterford School

Board Member | 2015 - Present

Housing Authority of Salt Lake County

Board Member | 2017 - 2018

Salt Lake County Bar Association

Member | 2001 - Present

Women Lawyers of Utah

Member | 2001 - Present

Minority Bar Association

Member | 2001 - Present

Aldon J. Anderson American Inn of Court

Member | 2010 – 2016

David K. Watkiss Sutherland Inn of Court

Member | 2020 - Present

Utah Association of Criminal Defense Lawyers

Member | 2010 - Present

National Association of Criminal Defense Lawyers

Member | 2010 - Present

Ethics Committee for the Utah State Bar

Member | 2011 – 2017

Utah Criminal Justice Center (University of Utah)

Board Member | 2018 – present

National Governor's Association Cross Branch Summit

Presenter- Juvenile Justice Reform | May 2018, Chicago, Ill

Prosecutor Impact, Philadelphia, PA

Fellow | 2018

Judicial Conference

Presenter – Data and the Future in Adult Reform | 2019

Coalition for Juvenile Justice

Presenter- Juvenile Justice Reform | June 2019, Washington D.C.

KUNKEL LAW OFFICES, P.C.

Williamsburg Office Park
5806 South 900 East
Salt Lake City, UT 84121
Telephone: 801-892-5067
E-Mail: kunkellaw@hotmail.com

SCOTT S. KUNKEL

Admitted to Practice
in Utah and Washington D.C.

DIRECT LINE: 801-281-2535

September 30, 2020

Ms. Christy Abad
Utah State Bar
645 South 200 East
Salt Lake City, Utah 84111

Re: Application/Letter of Interest for ABA House of Delegates

Dear Bar Commission:

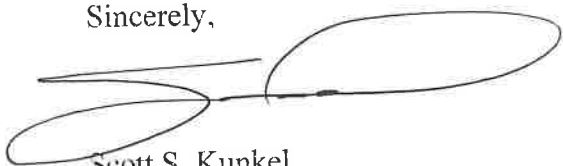
Attached is my resume which I am submitting as part of my application to be the Utah State Bar's representative in the American Bar Association House of Delegates. I would be honored to serve as a representative for the Utah State Bar. I am a member of the American Bar Association and the Litigation Section of the American Bar Association.

I have been practicing law for over 30 years. My practice is a litigation-oriented practice. I have tried both civil and criminal cases in state and federal courts, through trial. During my career I have either worked in a small firm or as a sole practitioner. While I would be representing the entire Bar, my experience gives me special insight into the needs of the small firm and solo practitioner.

Serving as an ABA delegate requires a significant time commitment. I am willing to make that commitment and can serve the entire term through August 2022.

Thank you for considering my application.

Sincerely,



Scott S. Kunkel
SSK/cc
Enclosure

SCOTT S. KUNKELHome

3059 West Creek Road
Park City, Utah 84098

Office

5806 South 900 East
Salt Lake City, Utah 84121
801-281-4200

Email: kunkellaw@hotmail.com

EDUCATION:University of Utah College of Law

Salt Lake City, Utah

J.D. Law Degree

May 1988

Journal of Contemporary Law / Journal of Energy

Law and Policy - Staff Member

1986 – 1987

University Publications Council

1987 – 1988

Legal Writing Teaching Assistant,

1987 - 1988

University of Utah College of Law

University of Utah

Salt Lake City, Utah

B.S. Economics

June 1985

Dean Franklin L. McKean Leadership Award

Beehive Honor Society

(University of Utah Alumni Association)

Omicron Delta Epsilon

(International Economics Honor Society)

Beta Sigma (Business Student Honor Society)

PROFESSIONAL:

Member of the Utah State Bar

1988 to present

Member of the Washington D.C. Bar

1989 to present

Admitted to Practice before United States District Court,
District of Utah

Admitted to Practice before Supreme Court
of the United States of America

Member, American Bar Association

Member, National Trial Lawyers Association

EXPERIENCE:

Utah Supreme Court, Intern – Judge Daniel Stewart	1986 – 1987
Hatch, Morton & Skeen - Salt Lake City, UT	1988 – 1990
Thompson, Hatch, Morton & Skeen – Salt Lake City, UT	1990 – 1992
Law Offices of Scott S. Kunkel, P.L.L.C. - SLC, UT	1992 – 2010
Kunkel Law Offices, P.C. – Salt Lake City, UT	2010 – Present

LEADERSHIP:

Utah Student Tenant Association - Executive Director
 Hinckley Institute of Politics - Advisor, Washington Winterim, Washington DC
 Omicron Delta Epsilon
 (International Economics Honor Society) - President (Utah Chapter)

PUBLICATIONS:

Insider Trading – A New Equal Access Approach, 15 Journal of Contemporary Law,
 51 (1989)

PERSONAL:

Married, three children.
 Interests include running, tennis, golf, hunting and fishing.

Christy Abad

From: Leta, David <dleta@swlaw.com>
Sent: Monday, September 28, 2020 10:22 AM
To: Christy Abad
Subject: Application for ABA House of Delegates
Attachments: DEL - Resume.pdf

Christy:

Please consider this email as my application for the open position as one of the Utah Bar's representatives on the ABA House of Delegates. I believe that, during the next two years, it will be very important for Utah to have a seasoned, experienced attorney as its representative with the ABA, and that I am well suited to fulfil that role. As Utah continues to "experiment" with its Rules of Professional Conduct and other licensure requirements, including its new "sandbox" concept for alternative practice structures and its development of the LPP license, it is being, and will continue to be, watched by other Bar associations on a state and national level. The person who represents Utah in the ABA needs to be ready to advance the State's interests and be able to command the respect of other Delegates. I believe I have these credentials. Moreover, this year, my firm's partner, Patricia "Trish" Refo, whom I know personally, is the president of the ABA, and, therefore, a Utah delegate from the same law firm, will have special access to this national organization and its leadership. My resume is attached.

Best,

David E. Leta

15 West South Temple, Suite 1200
Gateway Tower West
Salt Lake City, Utah 84101-1547
Direct: (801) 257-1928
Fax: 801-257-1800
Mobile: 801-560-LETA (5382)
www.swlaw.com; dleta@swlaw.com

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David E. Leta

Of Counsel | Salt Lake City

Tel. 801.257.1928

dleta@swlaw.com

Main Bio

David Leta is a financial problem solver. For over 43 years, he has represented debtors, creditors, trustees, creditor committees, asset purchasers, vendors, equity holders and other parties in all aspects of financial disputes, including collections, foreclosures, workouts, receiverships and bankruptcy. David's experience enables him to analyze a financial situation from multiple perspectives and design creative, durable solutions. As an advocate, he handles litigation for clients involving the United States Bankruptcy Code, the Federal and Bankruptcy Rules of Procedure, the Uniform Commercial Code and applicable state laws. David also serves as a neutral in mediating financial disputes for non-clients.

Representative Experience

Recent Major Engagements

- Lead counsel for largest senior secured creditor (claims exceeding \$100M) in Chapter 11 bankruptcy of debtor company involved in media advertising.
- Lead local bankruptcy counsel in the successful asset sale and reorganization of a large open pit copper mine in southern Utah that resulted in a significant dividend to general unsecured creditors.
- Lead counsel for Utah sports equipment vendors with reclamation and unsecured claims in large, national Chapter 11 bankruptcy of sporting goods retail company.
- Lead counsel to the Committee of Unsecured Creditors in the reorganization of the largest dairy operation in Utah
- Lead bankruptcy counsel to a consortium of senior secured creditors with liens against one of the largest tar sands processing facilities in Eastern Utah
- Lead counsel in prosecuting and defending \$100M+ preference, fraudulent transfer and equitable subordination claims
- Lead counsel in complex claims litigation involving multi-million dollar intellectual property rights as assets of the bankruptcy estate
- Lead counsel to Unsecured Creditors' Committee in connection with multi-state real estate sales agent franchise business
- Lead counsel to creditors in connection with prosecution and defense of their claims, as well as purchase by them of business from the estate
- Lead counsel to senior secured creditors in prosecuting and defending \$60M+ claims secured with debtor's assets, as well as negotiation, drafting and consummating settlement and sale of the claims

to third-party buyer

- Lead counsel to largest unsecured creditor in prosecuting non-dischargeability complaint against individual debtor, and assisting the Chapter 7 Trustee to investigate, prosecute and recover possible fraudulent transfers from third parties
- Lead counsel to senior secured lender in pursuing remedies against debtor and its assets, and in negotiating plan terms
- Lead counsel to lender in judicial foreclosure action involving complicated SWAP litigation
- Lead counsel to largest supplier of inventory in large, multi-state residential security system bankruptcy case and related proceedings
- Lead counsel to debtor's largest secured creditor in obtaining appointment of receiver and collection of amounts due under defaulted loan secured with over \$250M in distressed credit card receivables
- Lead counsel to largest secured creditor of fabrication business in obtaining appointment of a receiver, in selling assets and in collecting collateral
- Lead counsel to largest secured creditor in pending judicial foreclosure action involving complicated title issues on unfinished commercial real estate development
- Counsel to largest, senior secured creditors to advance and prosecute senior secured claims, and to recover collateral in the pending Chapter 11 bankruptcy cases, including resolution of complicated plan terms involving development of large tar sands resources project
- Lead counsel to largest secured creditor in connection with post-nonjudicial foreclosure deficiency action, with complicated issues involving water shares separate from real property assets
- Lead counsel to largest senior secured creditor in complicated tiered lending arrangement involving multiple loans and real estate assets
- Lead counsel to lender in judicial foreclosure and collection of multi-million dollar claim secured with real property assets in Southern Utah
- Counsel to senior secured lender in large, multi-affiliate bankruptcy proceeding involving secured and unsecured claims against one of the debtor's affiliates
- Lead counsel to senior secured creditor in bankruptcy and post-bankruptcy foreclosure in connection with incomplete casino project in Las Vegas
- Lead counsel to senior creditors and shareholders in bankruptcy and post-bankruptcy proceedings to enforce claims and acquire data center business
- Lead counsel to senior secured creditors in multi-state rental car business bankruptcy proceeding, including defense of lender liability claims
- Special counsel to Chapter 7 Trustee to prosecute multi-million dollar fraudulent transfer claims arising out of the pre-petition purchase of debtor's life settlement contracts
- General bankruptcy counsel to large developer of golf and residential properties
- Lead counsel to governmental agency in bankruptcy action involving over 1400 acres of environmentally sensitive development property
- Lead counsel to owners in connection with resolution of actual and contingent liabilities arising out of failed casino businesses, including negotiation of complicated plan terms that were largely based on tax considerations
- Lead counsel to senior secured creditor in connection with bankruptcy case of large regional tractor and trailer dealership

- Lead counsel to largest senior secured creditor in connection with Chapter 11 bankruptcy case of large regional construction equipment rental business
- Lead counsel to largest senior secured creditor in connection with bankruptcy case of large Southern California construction equipment rental business
- Counsel to Unsecured Creditors' Committee in Chapter 11 bankruptcy case involving large failed real estate development
- Counsel to individual business debtor in a Chapter 7 bankruptcy case involving complicated dischargeability issues under DOMA and the definition of "spouse" in the bankruptcy code
- Counsel to individual debtor in complicated bankruptcy case involving tax, trust and fraudulent transfer issues
- Counsel to buyer in connection with matters related to the acquisition of large copper processing and mineral assets
- Counsel to licensor in connection with complicated, multi-state license dispute, including dispute with bankruptcy estate of prior licensor
- Lead counsel to credit card processing company in connection with security interest, reserve account and chargeback claims under merchant agreement of a bankrupt credit card merchant
- Counsel to senior secured lender in connection with failure to three separate hotel properties on public land leases
- Lead counsel to lender in pursuit of a multi-million dollar deficiency judgment related to mega-home in Alpine, Utah, and defense of various claims asserted against lender arising out of the transaction
- Lead counsel to large secured and unsecured creditor in pursuing and collecting claims against individual debtor entrepreneur with over \$70M in liabilities, and involving complicated jurisdictional issues of exemptions, absolute priority rule, nondischargeability and plan terms

Education

- University of Utah College of Law (aka S.J. Quinney College of Law) (J.D., 1976)
 - Editorial Board, Law Review
 - Order of the Coif
 - Phi Beta Kappa
- State University of New York at Binghamton, Harpur College (B.A., highest honors, 1973)

Professional Memberships & Activities

- American College of Bankruptcy, Fellow (2003-present)
 - Director, American College of Bankruptcy Foundation
 - Member, Pro Bono Committee of the Foundation
 - Member, Senior Fellows Committee
- American Bankruptcy Institute
 - Rocky Mountain Bankruptcy Conference
 - Advisory Board (2008-2015)
 - Chair (2004-2008)
- American Bar Association

- Litigation Counsel of America, Fellow (2014-present)
- Salt Lake Chamber of Commerce, Leader Utah Program Member (2018)
- State Bar of Utah
 - Fund for Client Protection Committee
 - Bankruptcy Section, Organizer and First Chairman
 - Bar Exam Grader – UCC questions
 - Utah Licensed Paralegal Practitioners - Examination and Testing Standards Committee for Debtor-Creditor specialization
 - New Lawyer Mentor Program, Mentor
- Utah Bankruptcy Lawyers Forum, Organizer and Initial Trustee
- University of Utah College of Law, Adjunct Professor of Commercial Law (1978-1982, 2012-2017)
- University of Miskolc Law Department, Visiting Professor, Miskolc, Hungary (Fall 2006)

Representative Presentations & Publications

Publications

- "Strategic Alternatives For and Against Distressed Businesses," Chapter Author, Thomson West (2016, 2018 ed.)
- Reporter and author, two chapters of Strategic Alternatives for and Against Distressed Businesses, Friedland, Hammeke, Vandesteeg, Thomson Reuters, 2019 Edition -- Chapter 36, Vol. I, on Utah Assignments for the Benefit of Creditors, and Chapter 71, Vol. II, on Utah Receiverships.
- Trigild, 2009 Deskbook, Guide to Receivership & Foreclosure, Author of Chapter on Utah.
- "Inside the Minds™, Chapter 7 Commercial Bankruptcy Strategies," Chapter Author, Practical Guidelines for Efficient Chapter 7 Filings, Thomson Reuters/Aspatore (2010 ed.)
- **Articles Published**
 - "UCRERA: Coming to Your State?" Author, Receivership News - A Publication of the California Receivers Forum (Summer/Fall 2017)
 - "Utah Becomes First State to Enact the Uniform Commercial Real Estate Receivership Act," Author, Utah Bar Journal (Volume 30 Number 4 July/August 2017)
 - "UCRERA: Coming to Your State?" Author, American Bankruptcy Institute Journal, Vol. XXXVI, No. 7, at page 28. (July 2017)
 - "Stern v. Marshall Changes the Landscape of Bankruptcy Court Jurisdiction," Utah Bar Journal, Vol. 26, No. 2, p. 34 (March/April 2013)
 - "Do the Ends Justify the Means Test," ABI Law Journal (2008)
 - "Circuit Notes," American Bar Association, 10th Circuit Editor (2008)
 - "Checklist for Small Business Cases Under Chapter 11," Utah Bar Journal (2007)
 - "Valuing Intangibles," Utah Bar Journal (February 2005)
 - "Highlights of the Bankruptcy Reform Act of 2004," Utah Bar Journal (2004)
 - "My Evolution from Paper-pusher to Key-clicker," Author, Utah Bar Journal (June/July 2004)
 - "Rebirth of Article 9," Author, Utah Bar Journal (November 2000) Speeches & Panel Participations
 - "Not Just a New Tool, But a New Toolbox: Utah's New Statute on Commercial Real Estate

- Receiverships," Panelist, Utah State Bar Summer Convention, Sun Valley, Idaho (July 27, 2018)
- "Effective Motion Practice: Pointers, Checklists, Templates, Best Practices and More" Panelist, Rocky Mountain Bankruptcy Conference (January 25, 2018)
 - "Proposed Rule Changes to the Federal Rules of Bankruptcy Procedure to Address Stern v. Marshall Jurisdictional Issues," Presenter, Utah State Bar Annual Convention, Snowmass, Colorado (July 2013)
 - "Stern v. Marshall Panel Discussion re Jurisdictional Issues," Presenter/Moderator, ABA 2012 Rocky Mountain Bankruptcy Conference (January 2013)
 - "Stern v Marshall One Year After: What About Bankruptcy Court Jurisdiction," Utah State Bar Annual Meeting, Sun Valley, Idaho (July 18-21, 2012)
 - "New Bankruptcy Rules Effective December 1, 2011," Snell & Wilmer, Webcast Presentation to GE Capital (November 15, 2011)
 - "So You Have a Judgment, Now What? Bankruptcy and Judgment Enforcement in Utah," Lorman Education Services, Advanced Judgment Enforcement in Utah, Salt Lake City, Utah (November 11, 2011)
 - "Uniform Commercial Code Articles 2A Leases," Snell & Wilmer, Presentation to GE Capital, Equipment Finance, Cedar Rapids, Iowa (September 20, 2011)
 - "The Good, The Bad and the Ugly, 10th Circuit Bankruptcy Judges Poll," American Bankruptcy Institute, Rocky Mountain Bankruptcy Conference, Denver, Colorado (January 27-28, 2011)
 - "Mergers and Acquisitions After the Financial Crisis," Snell & Wilmer, Corporate Counsel Forum, Newport Beach, California (October 8, 2010)
 - "SARE's and SPE's in Bankruptcy," Utah State Bar, Banking & Finance Annual Meeting, Salt Lake City, Utah (April 13, 2010)
 - "D&O Liability: Navigating the Regulatory Landscape," Snell & Wilmer, Presentation to Banks and Credit Unions (April 2010)
 - "Staying Out of the Water-Works and Structured Deals," Lorman Education Services, Navigating Bankruptcy in Troubled Times: Options for Creditors and Debtors, Salt Lake City, Utah (December 11, 2009)
 - "Remedies Under Article 9 of the UCC, Deeds in Lieu of Foreclosure, Forbearance Agreements, Secured Liens and Lender Risks, Receiverships, Deficiency Judgments and Pursuit of Guarantors," National Business Institute, Negotiating Real Estate Loan Terms and Workout Options, Salt Lake City, Utah (February 5, 2009)
 - "So You Have a Judgment, Now What? Bankruptcy and Judgment Enforcement in Utah," Lorman Education Services, Judgment Enforcement, Salt Lake City, Utah (November 2, 2008)
 - "Executory Contracts and the Application of 11 U.S.C. § 365," Snell & Wilmer, Bankruptcy Practice Group Meeting (March 6, 2008)
 - "An Overview of Defaults and Remedies in Lending Transactions," Utah State Bar, Mid-Year Meeting, St. George, Utah (February 7, 2008)
 - "Mechanics Liens, Fraudulent Transfers, Preferences and Pre-Bankruptcy Documentation; Executory Contracts and the Application of 11 U.S.C. §365 with Drafting Suggestions," Lorman Education Services, Bankruptcy, A Creditor's Perspective in Utah, Salt Lake City, Utah (December 16, 2006)
 - "Business and Individual Bankruptcy Proceedings in the United States of America," Center for International Legal Studies, Lecture Series, University of Miskolc, Hungary (October 1-30, 2006)

- "Implications of New Bankruptcy Act on Business Bankruptcies," Snell & Wilmer Presentation to GE Capital Franchise Finance Corporation (May 19, 2006)
- "Nondischargeable Restitution Obligations-Collection Hammer for Creditor Victims," Idaho State Bar, 24th Annual Commercial Law & Bankruptcy Seminar, Coeur d'Alene, Idaho (February 16-18, 2006)
- "Battle of the Codes; The Bankruptcy Bully vs. the Tax Tyrant (Tax Liens, 505b Determinations, Sovereign Immunity & New Disclosures)," American Bankruptcy Institute, Rocky Mountain Bankruptcy Conference, Denver, Colorado (January 26-29, 2006)
- Utah State Bar, Ethics Advisory Committee, Presentation to the Utah Supreme Court Rules Committee re Opinion No. 05-03; Salt Lake City, Utah (January 23, 2006)
- "Pre-Petition Sanctions, Contempt (Civil/Criminal), Penalties and Punitive Damages: Allowability and Enforceability," American Bankruptcy Institute, Winter Leadership Conference, Palm Springs, California (December 1-3, 2005)
- "Overview of Major Changes in Chapter 7; Other Changes Affecting Particular Creditors or Industries," National Business Institute, Aligning Your Practice With the Bankruptcy Abuser Prevention Act of 2005, Salt Lake City, Utah (October 14, 2005)
- "So You Have a Judgment, Now What? Bankruptcy Enforcement in Utah-Recent Rule and Code Changes," Lorman Education Services, Judgment Enforcement in Utah, Salt Lake City, Utah (July 8, 2005)
- "Implications of New Bankruptcy Act on Business Bankruptcies," Snell & Wilmer presentation to GE Commercial Finance, Scottsdale, Arizona (May 19, 2005)
- "A Bankruptcy Lawyer's Take on Asset Protection," Utah State Bar, Estate Planning Section Lunch Meeting, Salt Lake City, Utah (May 10, 2005)
- "Valuing Intangibles," Valcon, Legal and Financial Perspectives on Business Valuations and Restructuring, Las Vegas, Nevada (March 3-4, 2005)
- "Are There Universal Standards, or Do the Ends Define the Rules?," American Bankruptcy Institute, Rocky Mountain Bankruptcy Conference, Denver, Colorado (February 10-12, 2005)
- "Bankruptcy: a Creditor's Perspective in Utah, Mechanics Liens, Fraudulent Transfers, Preferences and Pre-Bankruptcy Documentation; Executory Contracts and the Application of 11 U.S.C. § 365 with Drafting Suggestions," Lorman Education Services (December 16, 2004)
- "Homeland Security-Keeping the Bankruptcy Barbarians Off Your Assets," Snell & Wilmer Presentation to GE Commercial Finance, Bellevue, Washington (November 17, 2004)
- "So You Have a Judgment, Now What? Bankruptcy and Judgment Enforcement in Utah," Lorman Education Services, Advanced Judgment Enforcement in Utah, Salt Lake City, Utah (November 11, 2004)
- "Daubert v. Merrill Dow Pharmaceuticals, Inc. and Till v. SCS Credit Corporation and its Possible Application to Chapter 11 Cram Down Interest Rates," Utah Bankruptcy Lawyers' Forum, Autumn 2004 Forum, Salt Lake City, Utah (September 21, 2004)
- "Liens and Credit Issues in Bankruptcy," National Business Institute, An Advanced Look at Utah Real Estate Law, Salt Lake City, Utah (September 1, 2004)
- "Dischargeability, Reaffirmation, Abandonment, Setoff and Use of Assets," Lorman Education Services, Protecting and Collecting Assets in Bankruptcy in Utah, Salt Lake City, Utah (August 18, 2004)

- "Executory Contracts," Snell & Wilmer, Practice Group Training Program, Salt Lake City, Utah (April 28, 2004)
- "Treatment of Secured Claims in U.S. Bankruptcy Cases," Center for International Legal Studies, Secured Transactions and Insolvency (January 11-17, 2004)
- "So You Have a Judgment, Now What? Bankruptcy and Judgment Enforcement in Utah," Lorman Education Services, Advanced Judgment Enforcement in Utah, Salt Lake City, Utah (November 11, 2003)
- "Recent Developments: Sections 523(a)(2), (4) and (6)," Utah Bankruptcy Lawyers' Forum, Autumn 2003 Forum, Salt Lake City, Utah (September 16, 2003)
- "Dischargeability, Reaffirmation, Abandonment, Setoff and Use of Assets," Lorman Education Services, Protecting and Collecting Assets in Bankruptcy in Utah, Salt Lake City, Utah (August 19, 2003)
- "Electronic Banking and Commerce; Ethical Issues," National Business Institute, Challenges in Utah Commercial Lending Practices, Salt Lake City, Utah (July 27, 2003)
- "Treatment of Successor Liability in Connection with Sales Under Section 1123(a)(5)(d) and 1141(c) of the Bankruptcy Code, and Under Section 363," American Bankruptcy Institute, Rocky Mountain Bankruptcy Conference
- "So You Have a Judgment, Now What? Bankruptcy and Judgment Enforcement in Utah," Park City Bar Association, Brownbag CLE, Park City (Utah, May 1, 2003)
- "Protecting the Creditor's Position," National Business Institute, Fundamentals of Bankruptcy Law & Procedure in Utah, Salt Lake City, Utah (December 11, 2002)
- "Bankruptcy: A Creditor's Perspective in Utah, Executory Contracts and the Application of § 365 With Drafting Suggestions and Mechanics Liens, Fraudulent Transfers, Preferences and Pre-Bankruptcy Documentation," Lorman Education Services, Salt Lake City, Utah (October 10, 2002)
- "So You Have a Judgment, Now What? Bankruptcy and Judgment Enforcement in Utah," Utah State Bar, Annual Convention, Sun Valley, Idaho (June 29, 2002)
- Snell & Wilmer Presentation to GE Capital Business Asset Funding, Bellevue, Washington (October 29, 2001)
- "OK Corral," NITA Trial Preparation Program, Phoenix, Arizona (October 24-25, 2001)
- "Bankruptcy: A Creditor's Perspective in Utah, Mechanics Liens, Fraudulent Transfers, Preferences and Pre-Bankruptcy Documentation," Lorman Education Services, Salt Lake City, Utah (October 11, 2001)
- "Training on the New Revised Article 9," Snell & Wilmer presentation to Bank of Utah (June 7, 2001)
- "The Bankruptcy Court and Ethics," National Business Institute, Basic Bankruptcy Litigation, Salt Lake City, Utah (December 14, 2000)
- Robert Morris Association Luncheon of Northern Utah Chapter, Banker's Association, Ogden, Utah (November 15, 2000)
- "Enforcement of Judgments in Utah and Ethical Considerations, Enforcement and Collection of Judgments in Utah," National Business Institute, Salt Lake City, Utah (July 29, 1999)
- "The New (and Improved?) Bankruptcy Code and Rules-Highlights of Proposed Changes," Utah State Bar, Annual Meeting, Sun Valley, Idaho (June 30-July 3, 1999)
- "Intersection Between Domestic and Bankruptcy Law, Discharge and Dischargeability of Domestic

Relations Debts," Utah Bankruptcy Lawyers' Forum and Family Law Section of the Utah State Bar, Salt Lake City, Utah (June 8, 1999)

- "Executory Contracts and the Application of the Bankruptcy Code to Nonresidential Real Property Leases," Snell & Wilmer presentation to American Stores Properties and Jewell Food Stores Property Management Staff, Chicago, Illinois (August 7, 1998)
- "Executory Contracts and the Application of the Bankruptcy Code to Nonresidential Real Property Leases," Snell & Wilmer presentation to In-House Legal Staff of American Stores Properties, Inc. and American Stores Company, Salt Lake City, Utah (May 28, 1998)
- "Loan Documentation," Snell & Wilmer presentation to Bank of Utah Loan Officers (April 15, 1998)
- "Fundamentals of Bankruptcy Law and Procedure in Utah," National Business Institute, Salt Lake City, Utah (October 21, 1997)
- "Bankruptcy Issues," Snell & Wilmer presentation to Bank of Utah Branch Managers and Officers (August 13, 1997)
- "The Impact of Bankruptcy on Dissolution of Marriage in Utah," National Business Institute (June 24, 1997)
- "Intellectual Property Rights and Bankruptcy," Lorman Education Services, Judgment Enforcement Seminar, Salt Lake City, Utah (April 29, 1997)
- "Issues and Considerations in the Creation and Use of 'Bankruptcy Remote' or 'Special Purpose Entities' for Asset Based Lending," Utah State Bar, Real Estate Section Meeting, Salt Lake City, Utah (October 24, 1996)
- "Fundamentals of Bankruptcy Law and Procedures in Utah," National Business Institute, Salt Lake City, Utah (September 26, 1996)

Professional Recognition & Awards

- Lawdragon 500 Leading U.S. Bankruptcy and Restructuring Lawyers (2020)
- The Best Lawyers in America®, Bankruptcy and Creditor-Debtor Rights/Insolvency and Reorganization Law, Litigation - Bankruptcy (1995-2021)
- Utah's Legal Elite: Bankruptcy/Workout, Utah Business Magazine (2005-2006, 2009-2020)
- Mountain States Super Lawyers®, Bankruptcy (2007-2020)
 - Top 10 (2014)
 - Top 25 (2012)
 - Top 100 (2012, 2015, 2016, 2018)
- National Academy for Bankruptcy Attorneys (NAFBA) - America's Top 10 Attorney Award - Utah (2014)
- Top 100 Litigation Lawyers in the State of Utah, American Society of Legal Advocates (2013, 2016)
- Top 100 Attorneys in the Mountain States, Salt Lake City Magazine (2013)
 - Top 25 Attorneys in Salt Lake City (2013)
- Lawdragon Top 3000 Leading Lawyers in America (2010-2011)
- Super Lawyers®, Bankruptcy - Business Edition (2011)
- Super Lawyers®, Bankruptcy - Corporate Counsel Edition (2009-2010)
- Utah 100 Elite, Utah Business magazine (2004-2006)

- Who's Who Legal USA (2006); Insolvency and Restructuring (2014)

Community Involvement

- Fourth Street Clinic, Board Member, Vice-President elect
 - Co-Chair, Advancement Committee
 - Member, Corporate Council Committee
- American Bankruptcy Institute's Rocky Mountain Bankruptcy Conference, Advisory Board, Ex-Officio Member
- S.J. Quinney College of Law
 - Board of Trustees
 - Former President
 - Member, Fundraising Committee
 - Executive Committee Member
- Utah Dispute Resolution, Board Member (2014-2019)
- Trout Unlimited, Stonefly Society (Salt Lake County affiliate)
 - Board member
 - Youth programs coordinator

Bar Admissions

- Utah

Court Admissions

- Supreme Court of Utah
- United States Supreme Court
- United States District Court, District of Utah
- United States District Court, District of Colorado
- United States Court of Appeals, Ninth Circuit
- United States Court of Appeals, Tenth Circuit
- United States Tax Court

Utah Bar Commission
 c/o Christy Abad
 Utah State Bar Executive Assistant
christy.abad@utahbar.org

Dear Utah Bar Commission

This is to request an appointment to be a Utah State Bar delegate to the ABA House of Delegates.

Previously, I served in that capacity for the Utah State Bar and also as the elected State Delegate. For those of you unfamiliar with the House, it has about five-hundred delegates and serves as the policy maker of the ABA.

My purpose in seeking this appointment is because of the Chair of the House, Barbara Howard, lawoffice@barbarajhoward.com, and the Chair of Rules and Calendar, Pam Bresnahan, PABresnahan@vorys.com, are desirous of my serving on the Committee of the House in the capacity as a consultant concerning complex litigation issues that come before the House. One must be a member of the House to serve in that capacity. Based on ABA rules, this Committee shall:

1. Assist the Chair in the expeditious handling of the business of the House;
2. Report to the House on proposals to amend the Rules of Procedure;
3. Prepare and send to the Secretary the preliminary calendar for each meeting of the House in time for the required distribution; and
4. Make recommendations to the House on the order of business and late resolutions.

I am including my current resume and a short bio from my firm's website for your consideration. If appointed, I will not request another appointment and I will only complete this two-year term.

Best,

Paul T. Moxley, Shareholder
 Cohne Kinghorn, P.C.
 111 E. Broadway, Suite 1100
 Salt Lake City, UT 84111

Email: pmoxley@ck.law
 Direct Line: (801) 415-0115
 Mobile: (801) 916-2079
 Fax: (801) 363-4378

PAUL T. MOXLEY

September 30, 2020

PERSONAL DATA

Office Address: 111 East Broadway, 11th Floor, Salt Lake City, UT 84111
 Email Address: pmoxley@ck.law
 Telephone: (801) 363-4300
 Mobile No.: (801) 916-2079

EDUCATION

University of Kansas, Juris Doctor, 1973
 Utah State University, Bachelor of Science in Political Science, 1970

PROFESSIONAL ASSOCIATIONS**Utah State Bar**

Paul T. Moxley Mentoring Award established in 2016, given annually to recognize valuable mentors in the Utah legal community.
 Distinguished Lawyer of the Year Award for 2009-2010, Utah State Bar
 President, 1994-1995
 Ex-Officio Member, Board of Utah State Bar Commissioners, 1996-2009
 Chairman, Task Force for the Utah State Bar on Professionalism for Lawyers, 1995-1996
 Co-Chair, Lawyers Centennial Committee for the Utah Statehood Centennial Commission, 1995-1996
 Member, Board of Utah State Bar Commissioners, 1989-1995
 Judicial Conduct Commissioner, Judicial Conduct Commission, 1990-1995

Jack Rabbit Bar, Chancellor, 2007-2008, for this eight-state organization consisting of State Bars from Utah, Wyoming, Idaho, Montana, Nevada, New Mexico, North Dakota, and South Dakota

Former Member, Board of Arbitrators of the National Association of Securities Dealers, Inc. (NASD) and the New York Stock Exchange

Mediator, complex commercial transactions. Graduate of Pepperdine Law School – Straus Institute of Dispute Resolution. Member of a panel of mediators. See www.utahadrservices.com

Master, Aldon J. Anderson Inn of Court in Salt Lake City

Fellow and State Chair, American Bar Foundation

American Bar Association

Chair, Standing Committee on the Federal Judiciary, 2018-2019¹
 Member, Rule of Law Initiative (ROLI), 2016-2017
 Member, Board of Governors, 2012 - 2015
 Member, Standing Committee on Federal Judiciary, Member for Tenth Circuit, 2009-2012
 Candidate, President-Elect, 2006-2007
 State Delegate, House of Delegates, 2000-2009
 Utah State Bar Association Delegate to House of Delegates, 1996-2000
 President, National Conference of Bar Presidents (NCBP), 2003-2004
 Member, Governance Commission, 2003-2005
 Co-Chair, Host Committee for Mid-Year Meeting in Salt Lake City, 2005
 Member, Standing Committee on Strategic Communications, 2005-2006, 2006-2009
 Member, Planning Committee for ABA Day in Washington, D.C., 2004, 2006, and 2009
 Member, ABA Standing Committee on Judicial Independence, 2002-2005
 Member, ABA Advisory Council to Standing Committee on Judicial Independence, 2001-2002
 Member, Commission to Study State Court Funding, 2003-2004
 Member, ABA Task Force on Judicial Selection and Campaigns, 2002-2003
 Member, Litigation Section, since 1974
 Member and Liaison from ABA Board of Governors, Criminal Law Section
 Member, Business Law, 1974-2002, and LPM, 1982-2002
 Lecturer, Central and East European Law Initiative (CEELI) for Uzbekistan and Kazakstan, 1996. Presented Law Office Practice Seminars to Russian lawyers for three weeks.
 Member, Executive Council of National Conference of Bar Presidents (NCBP), 1996-1999

PRACTICE and RELATED EXPERIENCE

1974 – Present	Practice of law and presently with Cohn Kinghorn, P.C.
1973 – 1974	Law Clerk, Honorable David T. Lewis, United States Tenth Circuit Court Judge (Chief Judge of Tenth Circuit).
Summer 1971	Law School Intern, District Attorney Arlen Specter of Philadelphia, Pennsylvania (former US Senator from Pennsylvania).

¹ This is the committee that vets federal judges for the United States. During my tenure as Chair we vetted 130 vacancies including Justice Kavanaugh. I gave senate testimony re Justice Kavanaugh.

1969 College intern, United States Senate (intern to Senator Frank E. Moss in Washington, D.C.).

1968 – 1970 Political Pollster.

LAW-RELATED ACTIVITIES

Law Lecturer and panelist concerning securities litigation at numerous securities conferences and other sponsored programs of the Utah State Bar Association.

Lecturer and panelist at American Bar Association, National Conference of Bar Presidents and Utah State Bar Meetings, and for CEELI (Central and East European Law Initiative).

Expert witness in securities law and corporate law issues in state and federal court proceedings.

Member of the National Advisory Board of Lexis-Nexis Martindale Hubbell, 2003-2005.

Delegation leader, People to People Ambassador Program for Utah Lawyers and Judges to China, April 2006.

BAR ADMISSIONS

United States Supreme Court
 Utah Supreme Court
 Federal District of Utah
 Federal District of Kansas
 Federal District of Missouri (Pro Hac Vice)
 Federal District of Wyoming (Pro Hac Vice)
 Federal District of Nevada (Pro Hac Vice)
 Federal District of Florida (Pro Hac Vice)
 Federal District of Pennsylvania (Pro Hac Vice)
 Third Circuit Court of Appeals
 Tenth Circuit Court of Appeals
 Eleventh Circuit Court of Appeals
 D.C. Circuit Court of Appeals
 United States Court of Claims
 Ute Indian Tribe

COMMUNITY SERVICE

Member, Alta Town Council, 2003- 2018 (Elected three times)
 Member, Board of Governors of University of Kansas School of Law, 2005-2007

Trustee, University of Utah College of Law Alumni Association, Board of Trustees, 1995 – 1996

INTERESTS

In addition to running marathons and competing in numerous triathlons, I am a skier and cyclist. I completed stages of the Tour de France Alps, including Alps d'Huez to Paris in 2006 and 2012, and Giro de'Italia in 2002 and 2008. I have participated in bike tours and races throughout the United States, cycled around Mt. Ranier (205 miles, 1995), Logan to Jackson (206 miles in one day, 2008), a bicycle tour of Colorado peaks in August 2017, and Europe. I played varsity football and ran track in college.

I am interested in trekking and mountaineering and have been on mountain expeditions, including trekking peaks in the Himalaya (Manaslu, Island Peak), and the Western United States (Mount Ranier and Mount Shasta), and numerous Utah peaks.

PAUL T. MOXLEY



Paul T. Moxley is a shareholder with the law firm Cohne Kinghorn, P.C. Mr. Moxley has been engaged in the practice of law since 1973 and handles many types of complex matters including securities litigation, white-collar crime, products liability matters, intellectual property and a wide array of commercial litigation. He helps clients to resolve their most critical disputes.

Following law school, Paul was a law clerk to David T. Lewis, who was Chief Judge of the Tenth Circuit for the United States Circuit Court. He was named the "Distinguished Lawyer of the Year" by the Utah State Bar for 2009-2010. Paul is rated "AV Preeminent" by Martindale Hubbell, which is the highest rating awarded to attorneys for professional competence and ethics.

Paul is a past President of the Utah State Bar and the National Conference of Bar Presidents, and he has served in the House of Delegates of the American Bar Association. In 2016, the Utah State Bar recognized Mr. Moxley by naming a mentoring award after him. He was on the Board of Governors of the ABA, representing four western states from 2012-2015. He is a past Chancellor of the Jackrabbit Bar Association, a group of eight State Bars from Utah, Wyoming, Idaho, Montana, Nevada, New Mexico, North Dakota and South Dakota. He is State Chair of the Utah Fellows of the American Bar Association. Mr. Moxley has been listed in Best Lawyers in America (commercial litigation), Super Lawyers, and has been recognized frequently among Utah's "Legal Elite" according to Utah Business Magazine. Mr. Moxley was a member of the ABA Standing Committee on the Federal Judiciary from 2009-2012. He is serving as Chair of this Committee for 2018-2019, directing the work of the fifteen-person committee. He served as a commissioner for the Utah Judicial Conduct Commission and is a past member of the ABA Standing Committee on Judicial Independence. Paul was a member of the Alta Town Council from 2002 through 2018.

Paul has run marathons and competed in triathlons and is an avid skier, cyclist, and tennis player. He completed stages of the Tour de France (Alps, including Alps d'Huez to Paris) and Giro de' Italia. He participated in bike tours and races throughout the United States including the ride around Mt. Rainier (205 miles), Logan to Jackson (206 miles in one day), and in Europe. Mr. Moxley is interested in trekking and mountaineering and has been on mountain expeditions, including trekking peaks in the Himalayas (Manaslu, Island Peak), the Western United States (Mount Rainier and Mount Shasta), and numerous Utah peaks. He played football and ran track in college.



111 E. Broadway, 11th Floor
Salt Lake City, UT 84111
(801) 363-4300



BARBARA J. HOWARD CO., L.P.A.
ATTORNEYS AT LAW

October 9, 2020

Via E-Mail Only (christy.abad@utahbar.org)

Attention: Christy Abad

Re: Paul Moxley's Application for ABA House of Delegates Position

Dear Members of the Utah Bar Commission:

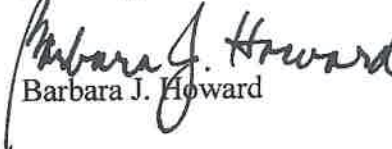
I am writing in support of Paul Moxley's request to be appointed as a Utah State Bar Delegate to the American Bar Association House of Delegates. I have known Mr. Moxley for many years through our ABA and related-entity work, including in his years in the House, on the Board of Governors and as President of National Council of Bar Presidents, an affiliated organization.

I am Chair of the ABA's House of Delegates, its legislative body. The House is comprised of just under 600 members, representing lawyers from across the country and even internationally. It meets twice a year, in February and in August, to consider and vote on proposed resolutions that are brought to it by its various constituent members. We may have anywhere between 25 and 60 resolution to consider at any particular meeting. The Committee on Rules and Calendar oversees the operations of the session of the House.

I would very much like Mr. Moxley to head a sub-committee of the Committee of Rules and Calendar to focus on resolutions that pertain to more technical and discreet areas of the law, and that require a more seasoned review than most members of the House can provide. Mr. Moxley's proposed position is an important one to ensure that the work the House is done effectively and efficiently. Mr. Moxley's experience in litigation, intellectual property law and securities law, as well as his knowledge of the workings of the ABA and the House of Delegates make him my choice for this position.

I very much appreciate your consideration of Mr. Moxley's request to receive an appointment from the Utah State Bar as a Delegate to the ABA House of Delegates. If you have any questions at all concerning my letter, feel free to reach me at (513) 702-1955. Thanks so much for your consideration.

Sincerely,


Barbara J. Howard

e-cc: Paul Moxley, Esq.
Pamela A. Bresnahan, Esq.

BARBARA J. HOWARD
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OSBA Board Certified Family Relations Law Specialist
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Founded 1909

Pamela A. Bresnahan
Direct Dial (202) 467-8861
Direct Fax (202) 533-9020
Email pabresnahan@vorys.com

October 7, 2020

VIA E-MAIL ONLY (CHRISTY.ABAD@UTAHBAR.ORG)

Utah Bar Commission
c/o Christy Abad
Utah State Bar Executive Assistant

Re: Appointment of Paul T. Moxley
Utah State Bar delegate to the ABA House of Delegates

Dear Members of the Utah Bar Commission:

I write in support of Paul Moxley's Letter of Interest submitted to you on September 30, 2020. My name is Pamela Bresnahan and I am serving as Chair of the American Bar Association's Committee on Rules & Calendar. The Committee on Rules & Calendar sets the calendar for the ABA House of Delegates and is the advisor to the Chair on the rules of the House. The House of Delegates meets twice a year to consider resolutions and amendments approved for submission to the House. I have asked Paul Moxley to chair a subcommittee of the Committee on Rules & Calendar that will review and recommend what we term complex or technical resolutions from various sections, commissions and committees of the ABA.

As you will see from Mr. Moxley's resume, he has vast experience with the ABA and its various entities. He served as a member of the Board of Governors and as a longtime member of the House. He commands respect of the House members and his expertise in litigation, particularly in intellectual property law and securities law, make him an ideal candidate to serve in this capacity in the House of Delegates.



Utah Bar Commission
October 7, 2020
Page 2

Mr. Moxley is a person of outstanding intellect. He is articulate and well-versed in the various issues brought before the House. It is for these reasons I am hopeful you will look upon his letter of interest favorably. If you have any questions or wish to discuss Mr. Moxley and his qualifications further, please do not hesitate to call me. My mobile phone number is (410) 353-1556.

Very truly yours,

A handwritten signature in blue ink that reads "Pamela A. Bresnahan". The signature is fluid and cursive.

Pamela A. Bresnahan

PAB/tjs

cc: Barbara J. Howard, Chair, ABA House of Delegates
Paul T. Moxely

TAB**4**

Utah State Bar®

M E M O R A N D U M

TO: Board of Bar Commissioners

FROM: Carrie T. Boren, Esq.
Administrator, New Lawyer Training Program

RE: NLTP Outstanding Mentor Awards

DATE: October 05, 2020

The Utah State Bar Committee on New Lawyer Training considered 28 nominations for the Outstanding Mentor Award. Attached to this memorandum you will find the nominations letters for the nominees who mentored a new lawyer in 2019.

The Committee voted to choose an award member from each term. For the January 2019 term, **Michael Langford** received the most votes and David Reymann received the second most. For the July 2019 term, **Patrick Tan** received the most votes and Tamara Fackrell received the second most.

The Utah State Bar Committee on New Lawyer Training recommends that **Michael Langford** and **Patrick Tan** receive the 2018 Outstanding Mentor Award.

Sincerely,

Carrie Boren

Carrie T. Boren

Nominations for Outstanding Mentor Award
January 2019 Term

Mentee's Name: Jake Tuimauualuga
 Mentor's Name: Todd Weiler
 Term: January 2019

Todd went above and beyond in contacting me and making sure that I was taken care of and that I was gaining valuable experience as an attorney. Todd took me to lunch nearly every time we met and whenever I texted him he'd make time to meet with me there and then. I got to witness him in litigating where I have not got that opportunity in my practice. Despite the fact that he works at a big firm, is a busy state senator, and a family man, he never makes excuses and gives his time freely to help. He's a great man and I appreciate his voluntary mentorship and friendship.

Mentee's Name: Lynne Wang
 Mentor's Name: Robyn L. Phillips
 Term: January 2019

She carefully planned and prepared materials for each of our meetings ahead of the time. She told stories about her personal experiences. Her answers to our questions were very helpful.

Mentee's Name: Camarie Stephenson
 Mentor's Name: Catherine Parrish Lake
 Term: January 2019

Catherine went above and beyond the NLTP requirements. She took time to discuss the scheduled topic as well as provide insight on life as a female lawyer, and managing working and home life. Catherine was generous with her time, money, and knowledge. She made it a point to touch base with me at CLE events, even the IP Summit when she was on the organizing committee. Catherine is an amazing mentor, role model, and friend.

Mentee's Name: Jeffery Jensen
 Mentor's Name: James Waddoups
 Term: January 2019

James was instrumental in helping me acquire the practical skills and judgment necessary to become a successful M&A attorney. Law school does not adequately prepare one to practice in the field of M&A. James went above and beyond in mentoring me on my first deals by spending countless hours answering my questions and assisting me in drafting and negotiating the definitive and ancillary purchase agreement documents. He would allow me to be on calls and revise the relevant provisions that were discussed on such calls. Then he would send me redline edits with comments back. Although it almost certainly required him to spend more time than simply doing it all himself, this process was very useful to me and provided me with confidence in myself as I moved forward on future deals.

Mentee's Name: James D Lewis
 Mentor's Name: Marco Brown
 Term: January 2019

Marco went above and beyond what he was required to do. I have heard from a number of colleagues that their mentor treated this program like a checklist of going through the mandatory things and then moving on. Marco did not do this. Marco not only crossed the required items off, but he then went into detail about things that are not a part of the curriculum. Marco went through business structure related to running your own small firm, how to get new clients, advertising benefits, litigation strategies, etc. Every time I met with him he was prepared to answer my questions, and then had topics of his own that he wanted to discuss with me. He gave me challenges, including reading books that were not directly related to being a lawyer, but extremely helpful in growing my practice, and setting goals before we would meet again. He would text me to follow up on my progress, and motivate me. I would highly recommend Marco to any new lawyer.

Mentee's Name: Camila Moreno
 Mentor's Name: Scott Mayeda
 Term: January 2019

As a graduate of an out of state law school I was hesitant and lost trying to navigate the USB NLTP requirements. I was brand new to the legal community and suddenly tasked with finding a mentor from this long list of strangers who I could connect with and learn from. By chance, I ran a quick search of Mr. Mayeda on the internet and felt hopeful that a minority mentor was participating in the program. Mr. Mayeda was receptive to being my mentor and was always flexible and engaging during our meetings. I got the opportunity to learn and discover general responsibilities of in house counsel for one of Utah's largest and most established corporations. While it didn't dawn on me until just recently, when the program ended, I found I was much more comfortable becoming involved with the local legal community and the USB.

Since then, I have applied for and accepted a position on the Utah YLD board, and on the Utah State Bar Commission. I am active with the ABA as the Utah Young Lawyer Representative, and have been able to grow my network here in Utah exponentially.

The NLTP program was a fantastic segway to becoming more active in the legal community, due in large part to Mr. Mayeda's encouragement and his previous involvement with the state bar. He was a truly wonderful mentor.

Mentee's Name: Christine Cooke
 Mentor's Name: Bill Duncan
 Term: January 2019

Bill Duncan has long been a mentor to me. His mentorship was simply formalized for the purposes of the New Lawyer Training Program last year. When I was an intern at my current place of employment, he actually oversaw my research projects and even then gave me helpful feedback and meaningful encouragement. I identified him as a great resource on several legal and policy topics. As my NLTP mentor, he was dedicated to scheduling our meetings, helped me formulate important goals and was willing to give me as much time as needed to cover the assignments, and was especially generous when the topics developed into genuinely interesting conversations. Bill has listened to me as I've brainstormed my evolving career path and is always at the ready to offer me insights, connections or helpful research. My point is, Bill Duncan was a mentor before NLTP and continues to be so after. He deserves to be publicly recognized as the NLTP Mentor of the Year and, truthfully, if it were also an award, as an all around good person.

Mentee's Name: Walter Mason
 Mentor's Name: Lisa Petersen
 Term: January 2019

Lisa is a wonderful buoy for those she mentors. In the chaos of one's first year of practice, there couldn't be a better support than Lisa. She was always available to give quick and insightful answers to all of my questions, whether they regarded complexities of substantive law, best practices for difficult situations with either clients or opposing counsel, or matters of decorum and professionalism in the court room. In addition to reviewing all of the mandatory subject areas and participating in each of the required experiences, I knew that Lisa was always there to answer, usually within minutes, whatever questions I had. Such a reliable and responsive lifeline took much of the anxiety and doubt out of my first year of practice, allowing me to confidently focus on doing great work for my clients and developing my skills. Even though I did not work for the same firm as Lisa, she made sure to create rewarding and educational hands-on experiences for me, including inviting me to watch her arguments on a motion for summary judgment. Because I was not in the same firm, Lisa made extraordinary efforts to educate me about the case and answer my questions so that I would gain the most from the experience. Lisa is an exceptional mentor who models professionalism in everything she does while providing expert legal advice and direction.

Mentee's Name: Elise Walker Jones
 Mentor's Name: Jim Lundberg
 Term: January 2019

Jim is an incredibly busy person. Not only did he help take the company he worked for public the year he was my mentor, but he was also on the Mapleton City Council and owns horses that he cares for. But, he always made time to meet with me and showed a real interest in my career. As a new lawyer working in-house, it was invaluable to have his perspective and talk to him about various issues that specific to being corporate counsel. Besides being an excellent lawyer, Jim is incredibly kind. Without the mentorship program I probably never would have developed the relationship I have with Jim.

Mentee's Name: Mallorie Goguen
 Mentor's Name: Heidi Buchi
 Term: January 2019

Heidi was so informative and was always there whenever I had a question. She showed me so many things and continues to be an amazing mentor even after NLTP. She allowed me to join her on one of her felony cases from beginning to end. She gets you excited about being an attorney. She was always available and always ready to point me in the right direction or talk me through anything I had going on. She will be a lifelong resource and I appreciate her!

Mentee's Name: Annika Jones
 Mentor's Name: Amy Sorenson
 Term: January 2019

Amy is an exceptional mentor. Not only does she consistently and happily take time out of her busy schedule to meet with me, her advice is helpful, honest, and insightful. She has included me in opportunities both at our firm and in the larger legal community. Throughout the craziness of my first year of practice, the Covid-19 pandemic, and the birth of my son, I have been extremely grateful to know that Amy has my back and is invested in my success.

Mentee's Name: Matthew Cole Strickland
 Mentor's Name: Michael Langford
 Term: January 2019

Michael Langford deserved to win the Mentor of the Year award because he went above and beyond the call of duty at every stage of the mentoring process. I could not have asked for a better Mentor. Michael was gracious enough to take me on as a mentee before I passed the bar and mentored me for roughly two years. Despite his busy schedule, he always made time to meet with me, as well as discuss life, the practice of law and how to properly balance the two. He was always more than gracious in sharing the lessons that he has learned throughout his esteemed career. The lessons that he taught me are some of the more invaluable lessons that I've learned throughout my study and practice of law.

Many of the lessons that Michael taught me had to do with the private practice of criminal defense and how to properly do it as a solo practitioner. This changed my career (and really, my life) because it resulted in me eventually leaving my old firm to open a criminal defense firm of my own. This was something I previously thought I would have never had the courage or knowhow to do, but something that I was able to do because of Michael's guidance and encouragement.

Another lesson that sticks out is integrating exercise into the practice of law. Not only did Michael highlight the importance of exercising for an outlet from the cases, physical/mental health and a way to avoid falling prey to some of the substance abuse issues that plague the legal profession, but he stressed the importance of exercise providing an opportunity to think about the cases WHILE exercising. This has been an extremely valuable piece of advice that has led to my taking up exercise again and has even resulted in my having crucial realizations about cases that I don't think I otherwise would have had. This has led to better work in my cases and better overall health for myself and I attribute much of this to Michael.

Moreover, Michael also was extremely welcoming during the mentoring process, was down to Earth and extremely humble despite his elevated status and reputation in the legal community. In this way, he was able to make me feel comfortable with someone with the sort of prestigious and intimidating reputation that he has. This was especially important because it made our interactions deeper and more genuine as opposed to the superficial dynamic that could have been the case (i.e. just meeting with each other in order to jump through a required hoop). To this effect, Michael has become a true friend because of the way that he approached mentoring me.

Michael deserves to win the Mentor of the Year award not only because he helped me better myself as an attorney, but because he helped me better my life in so many different ways through his leadership and dedication as a mentor.

Mentee's Name: W. Ash McMurray
Mentor's Name: David Reymann
Term: January 2019

Dear Board of Bar Commissioners,

I write to nominate David Reymann for the New Lawyer Training Program Outstanding Mentor award. A mentor guides others to navigate and overcome obstacles through the benefit of the mentor's experience. An outstanding mentor not only imparts knowledge but provides an example to follow personally and professionally to help others not only navigate those obstacles, but also learn how to become the kind of person who eliminates barriers and lifts up others around them.

David is an outstanding mentor. Over the course of my time working with and learning from David, he has consistently taken time to critique and provide detailed and constructive feedback on my work product. He is honest, incisive, and generous with his time--there has never been a time when I was turned away when I asked for his help, feedback, or advice, regardless of whether the topic was drafting a brief or balancing work and personal life.

Moreover, David provides a personal example that I continue to try to emulate. David has demonstrated time and again that he will always consider and speak on behalf of those around him who have a smaller voice or whose interests may be more easily ignored or glossed over. This is true both when he advocates for clients and for young associates whose interests sometimes come into tension with those of senior partners. For me in particular, David encouraged me to take a sudden and unexpected personal opportunity that would take me away from the firm. When he heard that another attorney at the firm suggested that some would be displeased if I took the opportunity, David volunteered and took time to speak with others on my behalf so that I could leave on good terms with the best opportunity to return, even while acknowledging that my path may not bring me back. For his enthusiasm, encouragement, and helping hand I will forever be grateful.

David is an exemplar of what it means to be an advocate, and his willingness to sacrifice his own time to actively lift up those around him serves as a constant reminder of what kind of person I want to be as I progress in my career and life. For these reasons, I believe David Reymann should receive the Outstanding Mentor award.

END OF JANUARY 2019 NOMINATIONS

Nominations for Outstanding Mentor Award
July 2019 Term

Mentee's Name: Kiley Tilby
 Mentor's Name: Patrick Tan
 Term: July 2019

To be completely honest, I wasn't super thrilled about this requirement. I thought it was one more thing I had to do when I was already busy trying to start my career. Now that's it's over, I have learned so much and am so grateful to my mentor for that!

When I first reached out to Patrick to ask if he would mentor me, he told me he already had a mentee but he still agreed to take me on as another mentor which was so incredible of him to begin with. With each meeting, Patrick brought real life examples of things he had experienced in his career to help me understand the particular topic. He has a background in both criminal defense and prosecution so he was able to bring both of those in to our discussions for a more diverse perspective.

During the witness prep section, Patrick invited me to sit in on a few police interviews who he was prepping for trial which was an incredible experience. He was also thoughtful enough to invite me to watch a seminar he was giving on domestic violence and allowed me to engage in that discussion. Patrick always made time for many phone calls outside of our meetings to answer all of my questions (even my dumb ones) when I was prepping for my own hearings and trials, even when he was swamped with his own work obligations. He then cheered me on and followed up with me after to see how things went after. I knew he was always in my corner, no matter what the outcome of the hearing or trial was. Aside from the professional aspect, Patrick was always there to check in on me in my personal life when I had challenges of my own. I was truly lucky to have him as my mentor. He went above and beyond that which was required of him and I have learned so much from him. I can't say enough good things about him! Patrick is truly one of the most genuine people I know and am so grateful to have him as a colleague and now friend.

Mentee's Name: Melissa Fiso
 Mentor's Name: R. John Moody
 Term: July 2019

John was an outstanding mentor for me this last year. John has over two decades of experience and was the perfect mentor to help me start my career off well. I greatly appreciate all the time John took out of his schedule to meet with me and teach me about how to be an effective advocate for my clients. Whenever I've had questions or concerns, John was always willing to staff cases and provide valuable resources. During one of my first trials John came and took time to help me negotiate for a successful resolution. John has helped me understand what civility and professionalism looks like in the legal field. Thank you John!

Mentee's Name: Elmon Tanielian
 Mentor's Name: Jason Rogers
 Term: July 2019

Mr. Rogers is an outstanding attorney and incredible mentor. He has found the perfect balance between guiding new attorneys by providing advice on complex legal issues and letting new attorneys explore client solutions and resolutions on their own. Mr. Rogers has been instrumental in my development as a corporate transactional attorney, emphasizing not only the legal needs of clients, but also their business and interpersonal needs. The time I was able to practice alongside him has made me a better attorney, and I would recommend him as a mentor to any young attorney who is interested in transactional law.

Mentee's Name: Brenton Ranck
 Mentor's Name: Brady Brammer
 Term: July 2019

Brady has consistently gone above and beyond to not only make sure I finished the New Lawyer Training Program, but also to make sure I'm set up to succeed in my personal and professional life. His door is always open, even though he is very busy with his responsibilities as a partner of the firm and as a member of the Utah house of representatives. He's instructed me on how to be a successful attorney, he's given me many opportunities to exercise my skills, and he's allowed me to succeed and fail. He encourages me to stretch myself. He's also been very transparent about what he expects from me, and what he believes I need to do grow as a person and as an attorney.

To give a few examples of Brady's mentoring style, shortly after I began working for his firm, he enlisted my help with a case that had been referred to the Utah Supreme Court for briefing and oral argument. Instead of simply doing everything himself, he made me part of his team, he caught me up to speed on the case, and he had me take point on the briefing. Although he outlined a few arguments he wanted to make, he encouraged me to find more arguments and cases that would persuade the Supreme Court, and he implemented nearly all of the points I proposed. What was particularly noteworthy to me is that he didn't simply accept everything blindly, but he challenged my arguments and points, and he invited me to challenge his as well.

As another example, after Brady received a smaller case, he assigned it to me and encouraged me to manage and litigate it myself. Although he regularly met with me so he could be up to date on my strategy, goals, and achievements, he expected me to successfully meet the clients needs from beginning to end. However, he didn't simply abandon me to work that case; he made sure to provide guidance and help when I needed it.

In addition to his normal mentoring obligations, Brady has regularly met with me to help me plan out my career and develop my skills. He's also put me in touch with people who can help me expand my professional and personal network. I would wholeheartedly recommend him as a mentor.

Mentee's Name: Josh Cutler
 Mentor's Name: David Jordan
 Term: July 2019

Mr. Jordan is one of the most well-respected attorneys in the state. He serves on numerous committees and boards, he has a busy trial practice, and he regularly takes on important and time-consuming pro bono work. In short, he is an especially busy attorney. Despite this, Mr. Jordan agreed to act as my mentor for the new lawyer training program. And he did so even though I am not an attorney in his firm. This decision proved to be very fortunate for me. Mr. Jordan used his knowledge, experience, and passion for the law to make my mentorship especially rewarding. After being his mentee, I have a stronger desire to be a skilled and ethical attorney. And, perhaps more importantly, I have a clearer vision of what a skilled and ethical attorney looks like.

Mentee's Name: Sarah Cox
 Mentor's Name: Tamara Fackrell
 Term: July 2019

I would like to nominate my mentor, Tamara Fackrell, for the Mentoring Award. I believe that she is the best candidate for this award as she is an individual who has demonstrated an exceptional commitment to mentoring women lawyers in the Utah legal community. Tamara is an outstanding mentor and strongly meets the following criteria: 1) she serves as a role model to women lawyers in the community, 2) she fosters the development and advancement of women lawyers, and 3) she significantly contributes to the profession and the community through these efforts.

She serves as a role model to women lawyers in the community. Many women lawyers in Utah look up to Tamara as a role model. Tamara began her legal career as a student at BYU Law School where she graduated cum laude. This would be a significant achievement for anyone, outside of the fact that she did all this while being a mother. Her baby was only six weeks old when she started her 1L year. She has gone on to have six children all while being a practicing attorney. Her passion was mediation and so she pursued that avenue with full determination despite being told by a professor that there was "no future" in that career. She definitely proved that sentiment wrong! Tamara is an award-winning attorney-mediator who has been practicing family law for over twenty years and has used mediation to help thousands of families. Women lawyers, like myself, see what she has done in and for the community and know that we can follow because of where she has carved out a path.

She fosters the development and advancement of women lawyers. Despite Tamara's busy schedule she always takes the time to help young women lawyers develop their professional identity and advance their legal skills. She is mentoring at least two women lawyers that I know of right now: myself and another young attorney named Ali Morgan. She also taught mediation as a law professor for fourteen years at the J. Rueben Clark Law School where she mentored another woman attorney I know of named Christine. She now has a private mediation practice focusing on divorce and domestic mediation that she started in 1997. She has invested everything she has into the women lawyers who work with her at the practice. It is a space of inclusion and acceptance for working mothers. It is a place where it is possible to be a good attorney and a good mother. This is remarkable in the legal field where this work-life balance is not readily found! This is all thanks to Tamara.

She significantly contributes to the profession and the community through her efforts. Tamara contributes to the profession and the community by being a Domestic Mentor for the State of Utah and doing one-on-one training for those, like me, who are becoming divorce mediators in the State of Utah. Tamara is a Master Mediator and Primary Trainer for the State of Utah and performs certifications in mediation and divorce mediation for professionals. Tamara received her PhD in marriage, family, and human development so she could help strengthen marriages and build families' resilience. She is a popular keynote speaker for workshops and national conferences, where she focuses on effective communication and conflict resolution in relationships. Her life's mission is to empower people throughout the world to strengthen their families and marriages. Tamara also served on the Advisory Committee to the Judicial Council for the State of Utah for House Bill 4, which required mediation for all contested divorces. These are just some of the ways she has positively impacted the profession and community through all she does. Tamara Fackrell deserves this Mentoring award. Thank you!

Mentee's Name: Clancey Henderson
Mentor's Name: Nate Alder
Term: July 2019

Nate was actually on hiatus from the program during the term I was enrolled, but decided to mentor me nonetheless. From the outset, Nate was an engaged mentor who dedicated his time and efforts to the task. Together we formulated a plan tailored to my needs, not his expectations. He used his ample experience to guide our discussions and our review of pertinent material. Where his experience was lacking, he roped in other seasoned professionals to shore up the learning experience. His mentorship went beyond the legal realm and helped shape the initial steps in achieving my professional and personal aspirations. He was always available and responsive. We met regularly and he didn't let Covid-19 slow down our progress. He was a dedicated mentor and continues to make himself available.

Mentee's Name: Donna Evans
Mentor's Name: Brent Bateman
Term: July 2019

Brent was extremely accessible and supportive. He provided great insights as to how an attorney should approach the practice of law with prudence and a good work ethic. Throughout the year he offered words of encouragement as well as critical advice to ensure that I did not make any serious missteps. As an older, new attorney, I was bit worried about working with a mentor because I knew I might be older than they were. Brent made me feel very comfortable and offered help when I needed it without trying to micromanage me. It was a great experience.

Mentee's Name: Orlando Luna
Mentor's Name: Leonor Perretta
Term: July 2019

Over the last year, Leonor was incredibly helpful and provided me with great advise for my career as new attorney in Salt Lake. She introduced me to other attorneys and she was always available to talk to me over the phone or in person. She gave me a lot of information and tips regarding immigration which helped me be prepare for my very first Court case in Immigration Court. Leonor also shared personal experiences and business tips going the extra mile to see me do well as a solo-practitioner at the time and a new attorney in Utah.

Mentee's Name: Marcus Degen
 Mentor's Name: Lauren Scholnick
 Term: July 2019

Lauren Scholnick is already well known as an accomplished and brilliant practitioner with the field of employment law. Amid her tireless endeavors to seek justice for employees across Utah and Idaho, she took the time to meet with me as regularly as was needed, and gave me her undivided attentions in mentoring my development as a young attorney. Most critically for me, she gave much-needed perspective on the demands and concerns of engaging in social justice work while maintaining a viable and ongoing law firm. Amid the tedious box-checking demanded by this program, conversations with her at all times focused on the practical and ethical knowledge needed for effective lawyering and representation. As if all that was not enough, Lauren was just plain excellent and personable company, and was always interested first and foremost in having a good conversation. Lauren Scholnick was an excellent mentor, and should receive recognition as such.

Mentee's Name: Mike Branum
 Mentor's Name: Matt Ekins and Aaron Randall
 Term: July 2019

I chose to have both a mentor within my firm and one outside my firm. Matt and Aaron were both phenomenal mentors. Both took time out of their busy lives each month to sit down with me and gave me their full attention. Aaron and Matt both have not only busy practices, but young children and obligations outside of work. Despite having plenty of excuses, neither ever made me feel like mentoring was a burden. Matt and Aaron were both willing to share challenges they have faced in their journey to where they are in their careers. In retrospect, I do not feel I could have had a better mentoring experience than that provided by Aaron and Matt. It was an honor to learn from them and I look forward to being a member of the Southern Utah Bar with them both for many years to come.

Mentee's Name: Stephanie Jensen
 Mentor's Name: Marla Snow
 Term: July 2019

Marla Snow stepped in to help me mid program since my previous mentor could not continue mentoring me. She has let me observe her, she has been so kind to make me feel comfortable to ask questions at any time, she is including me in projects in the future and has given me suggestions for valuable resources. It was very intimidating to have to start over with someone new and she has been so kind and helpful. I appreciate her more than she will ever know.

Mentee's Name: Jeffrey Daybell
 Mentor's Name: Joshua Baron
 Term: July 2019

Josh was instrumental in mentoring me in the practice of law, but also in helping me create my solo law firm. His mentorship provided opportunities to interact with other attorneys and help with forming invaluable business relationships for my own practice.

Mentee's Name: Travis Phelps
 Mentor's Name: Morgan Fife
 Term: July 2019

Morgan Fife deserves the Outstanding Mentor Award for three reasons. First, Morgan and I would meet up for breakfast each month and, along with discussing the NLTP requirements, Morgan would spend over an hour (sometimes two-hours) giving me invaluable practice pointers. These practice points would range from communications with clients to specific Utah procedural rules dealing with cases I was working on. I would eagerly ask Morgan questions, and Morgan would happily give me answers. After each meeting with Morgan I would get in my car and quickly write down all of his practice pointers. Second, anytime I encountered a motion or pleading unique to the firm I am working with, I would immediately reach out to Morgan. Even though Morgan is very busy, Morgan would take the time to dig through his documents and find me a near perfect template for me to use as I drafted the motion/pleading.

Third, during the NLTP, Morgan became not only a good professional contact, but a good friend. Seeing the excitement Morgan had for the practice of law made me excited to practice law. Our meetings quickly became more than just fulfilling the NLTP requirements. As soon as we would sit down for breakfast, we would both anxiously jump into discussions about the cases we were working. I can firmly say that having Morgan as my mentor made me greatly appreciate the NLTP.

Mentee's Name: Mary Manley
 Mentor's Name: Debbie Hill
 Term: July 2019

Debbie has an incredible amount of experience, coupled with an incredible reputation, knowledge base, and overall care. She believes in what she does, and after 20 years on the job, sees each client that she serves as a person, and gives her time care and attention to each. She has been the most valuable mentor that a person could hope to find. From the very beginning of my mentor-ship, she has encouraged me, helped me, spent the time thinking out ideas with me. She has given me incredible amounts of her time, during work, during lunch, Court, and even in the evenings. She has gone way above and beyond the check list we had to complete for the program. She has become more than a mentor, but a role model, and a person whom I aspire to be. Debbie is a person, and attorney, unlike any other, and I could not have been more blessed for her being willing to share you knowledge and experience with me.

END OF JULY 2019 NOMINATIONS

TAB 5

2020 Utah State Bar Member Survey

Final Results

April 8, 2020



Overview

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


Goals

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

Demographics

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

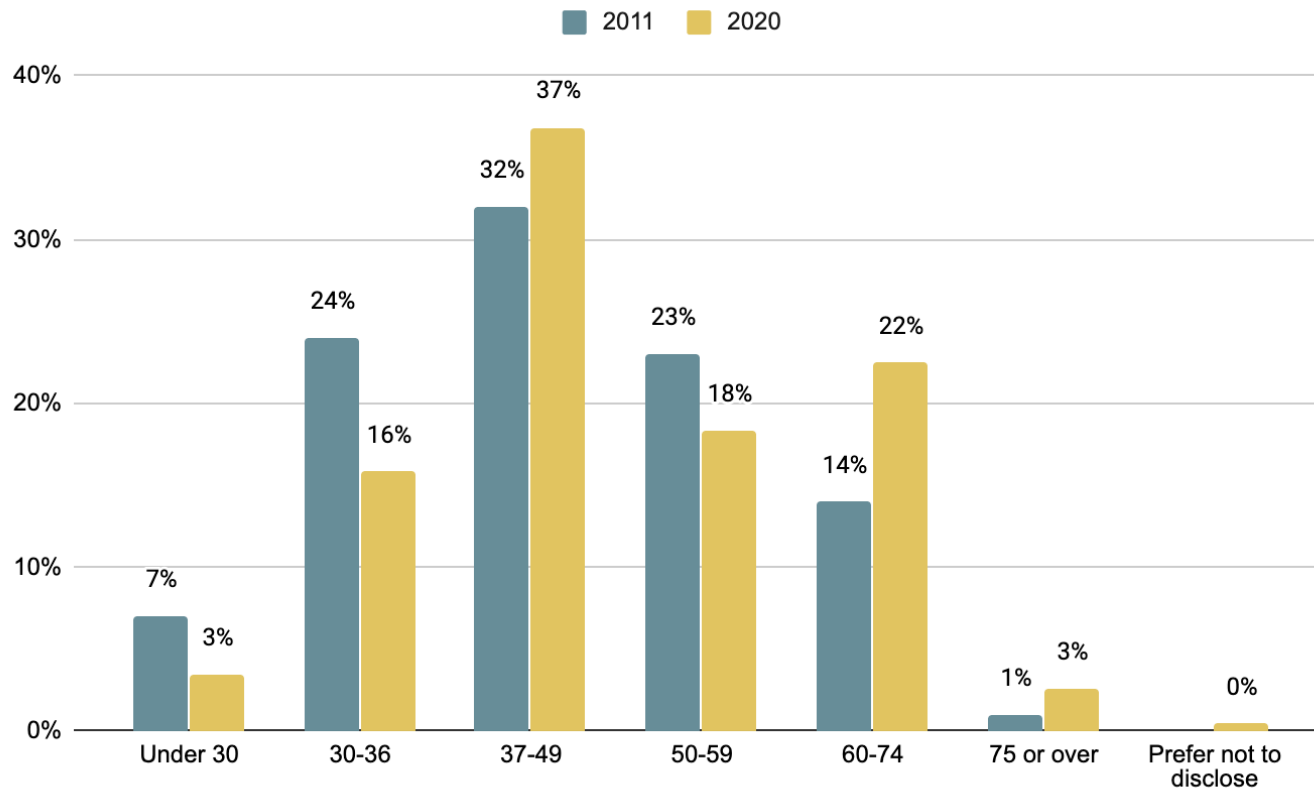
Male is still the dominating gender with 70% of the gender makeup in 2020. Females were up to 29% and 1% were undisclosed.



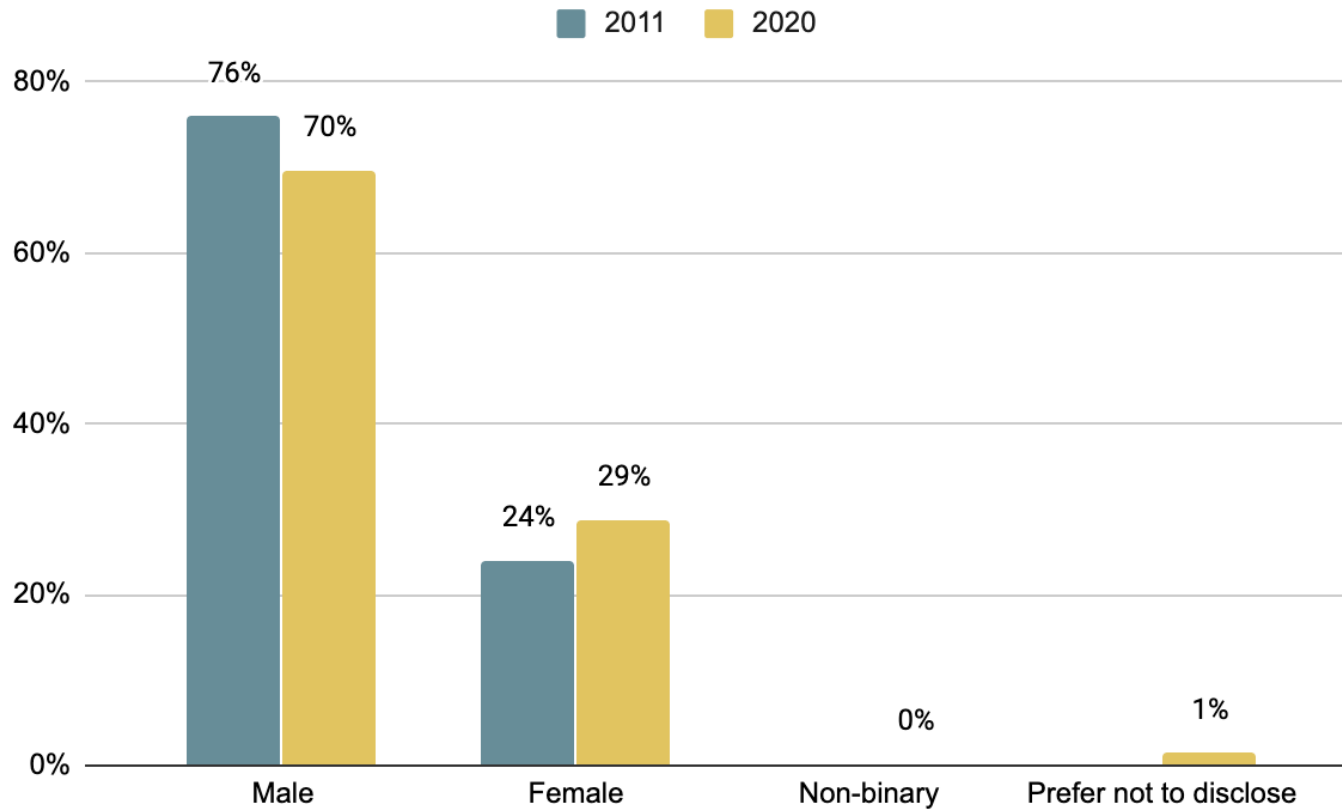
One-third of survey respondents said they face challenges as a lawyer due to ethnicity, gender, age, religion, nationality, disabilities, or sexual orientation.

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

What is your age?

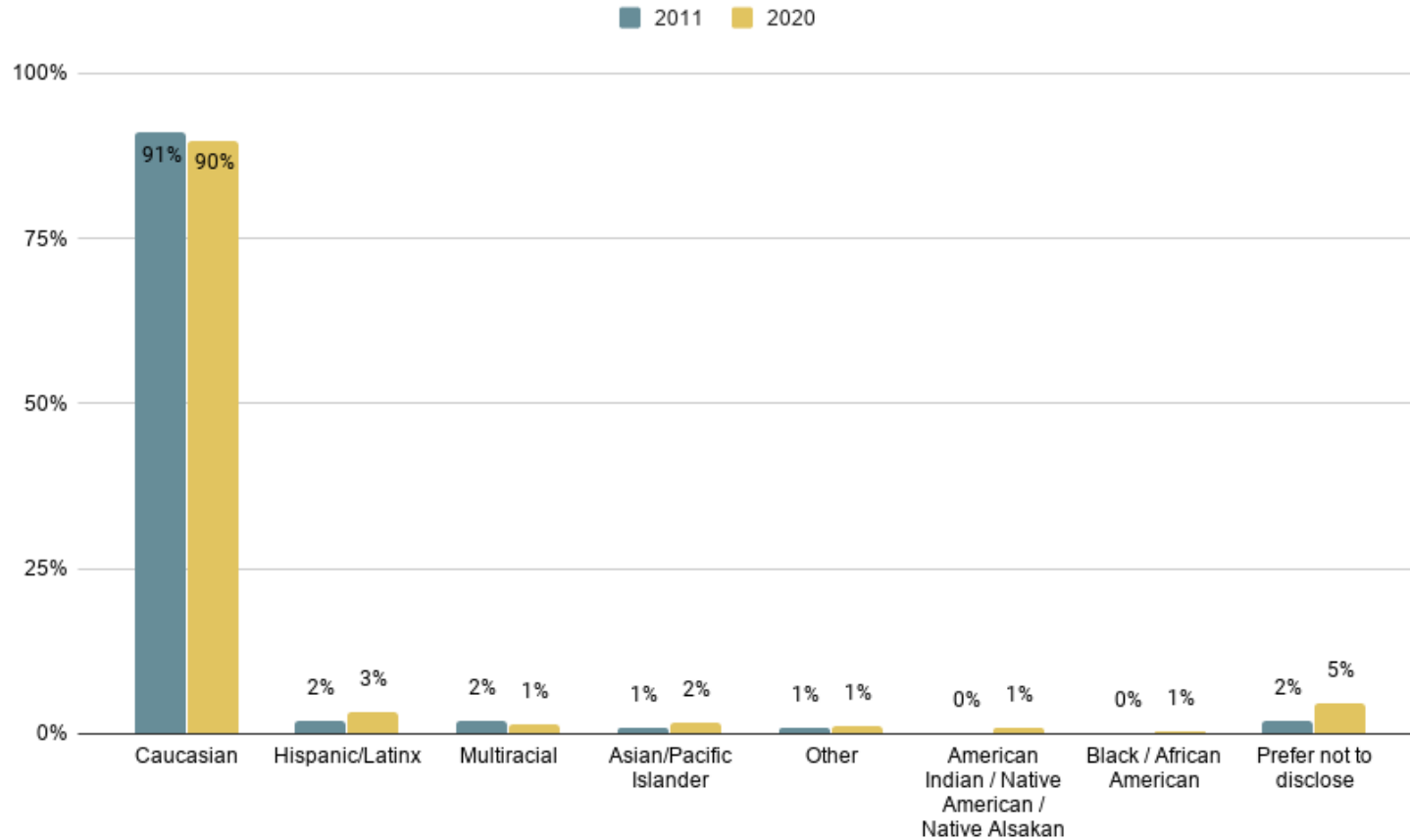


How do you identify your gender?

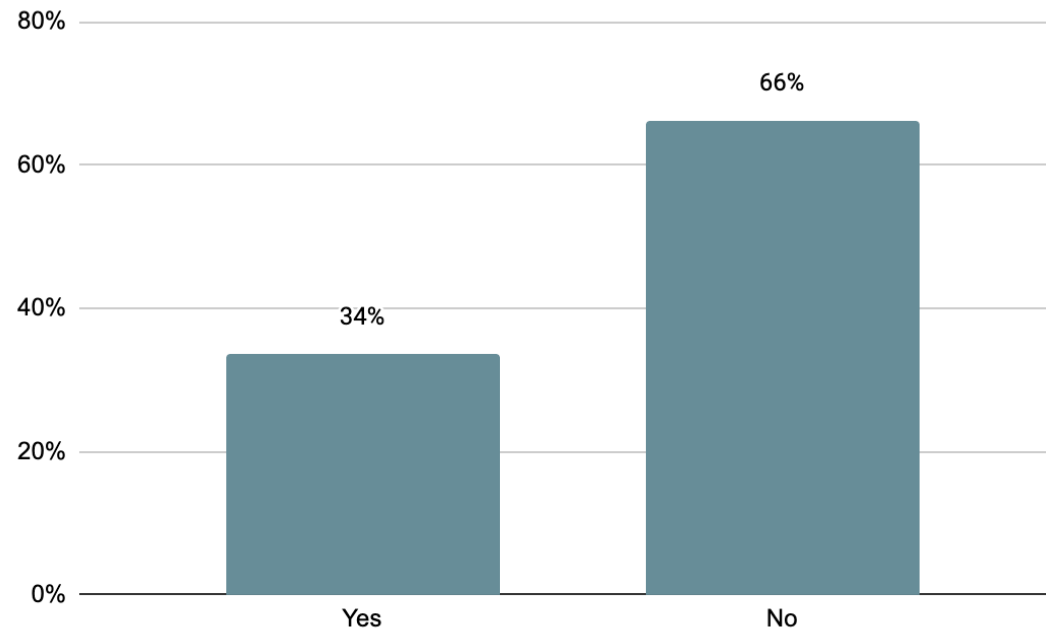


What is your ethnic or racial background?

Please select all that apply.

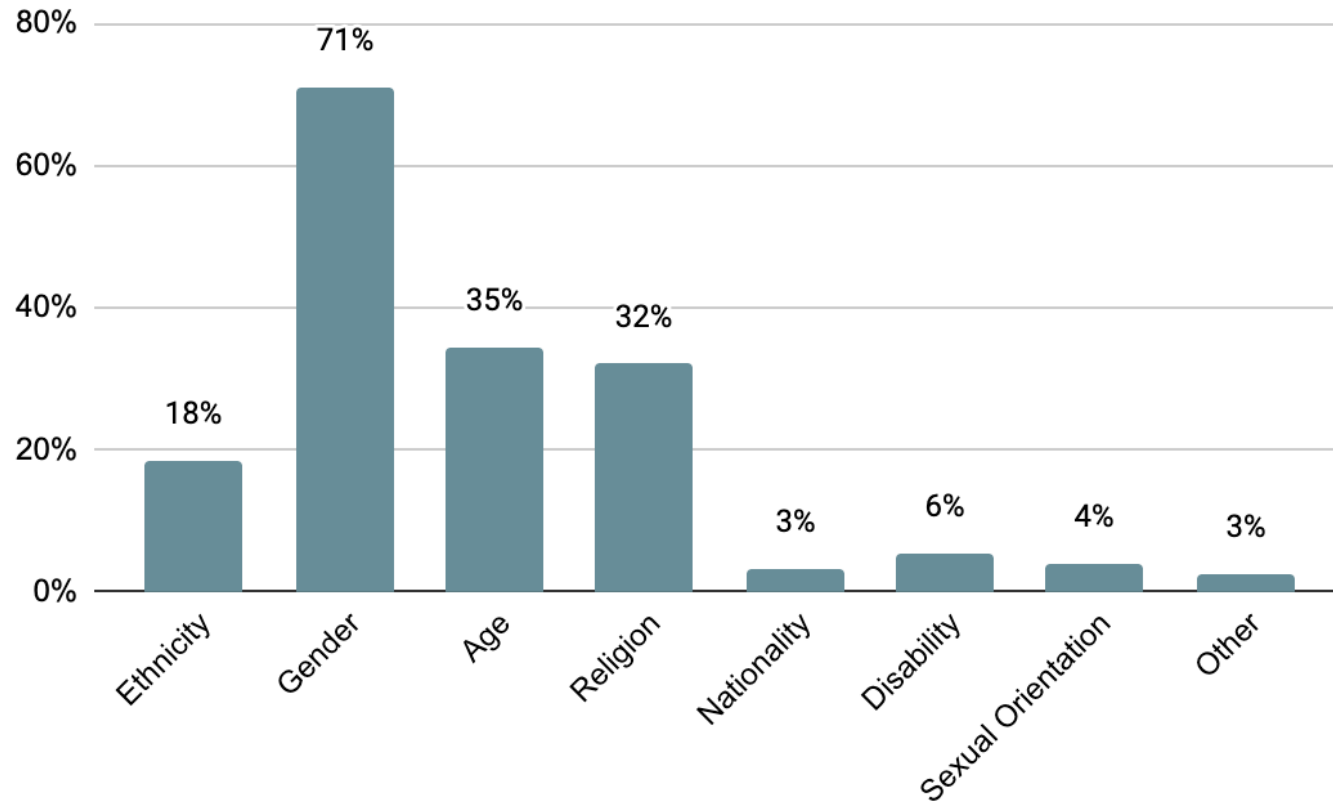


Have you experienced challenges as a lawyer due to your ethnicity, gender, age, religion, nationality, disabilities, or sexual orientation?

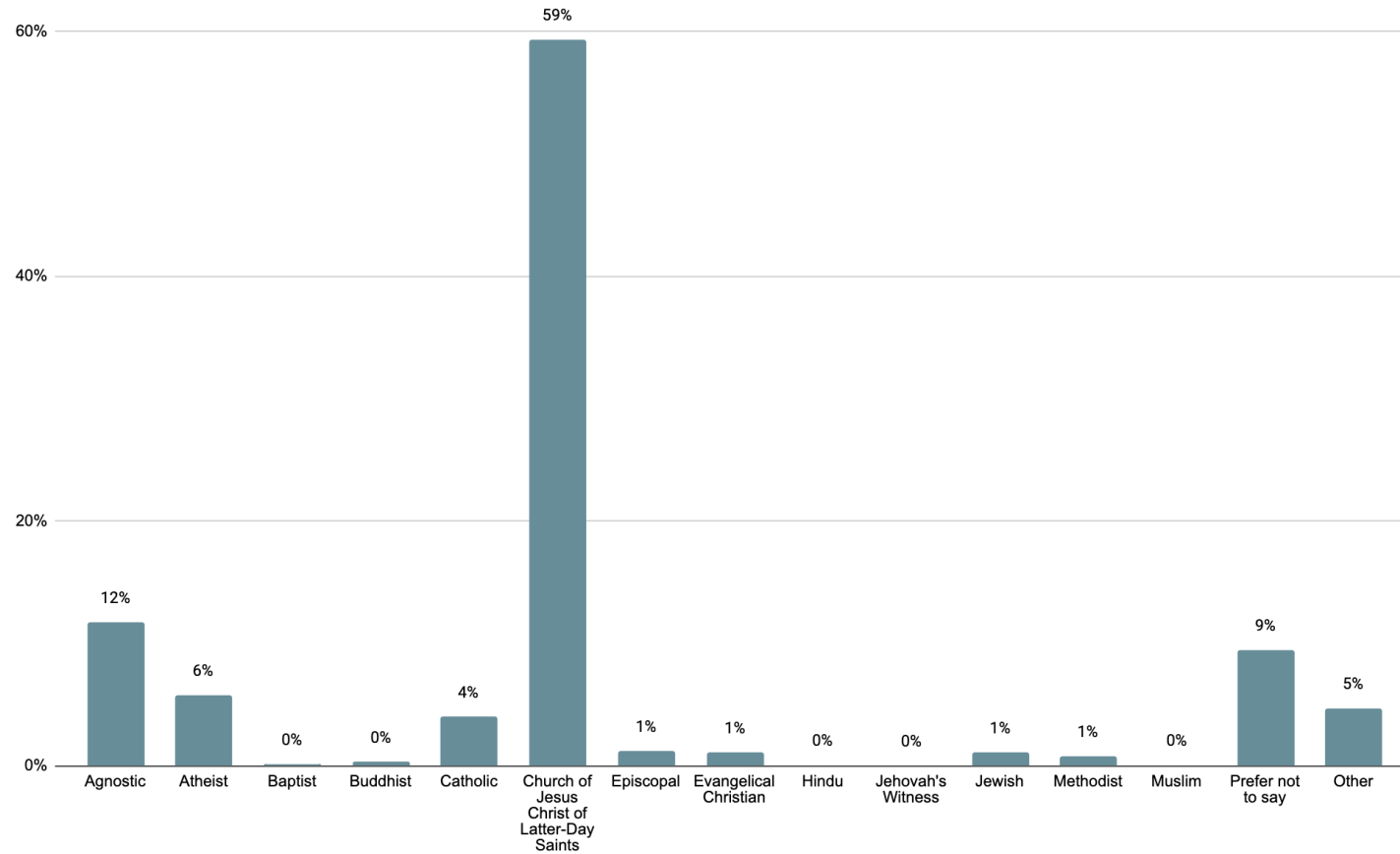


In which of the following areas have you experienced challenges as a lawyer?

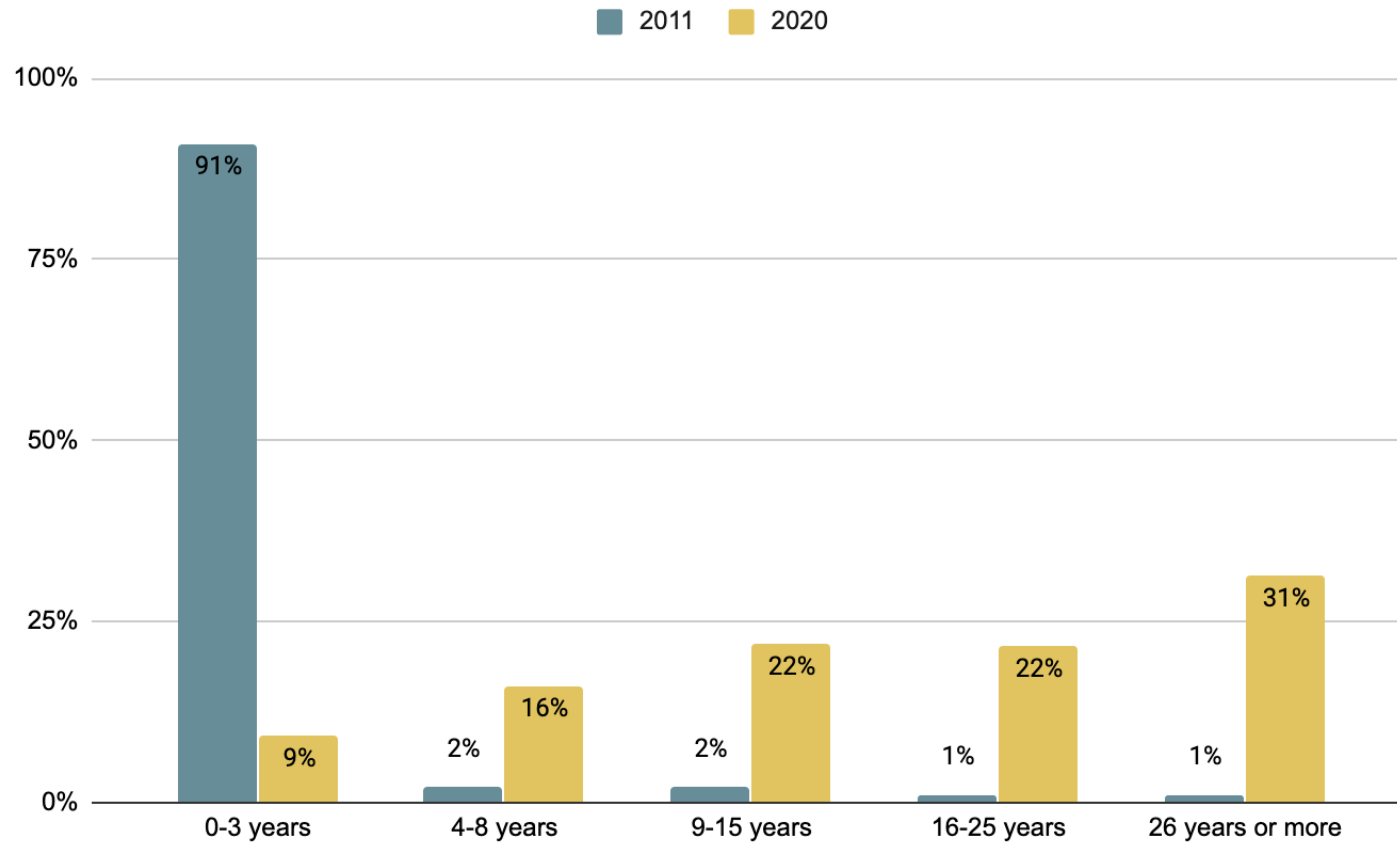
Please select all that apply.



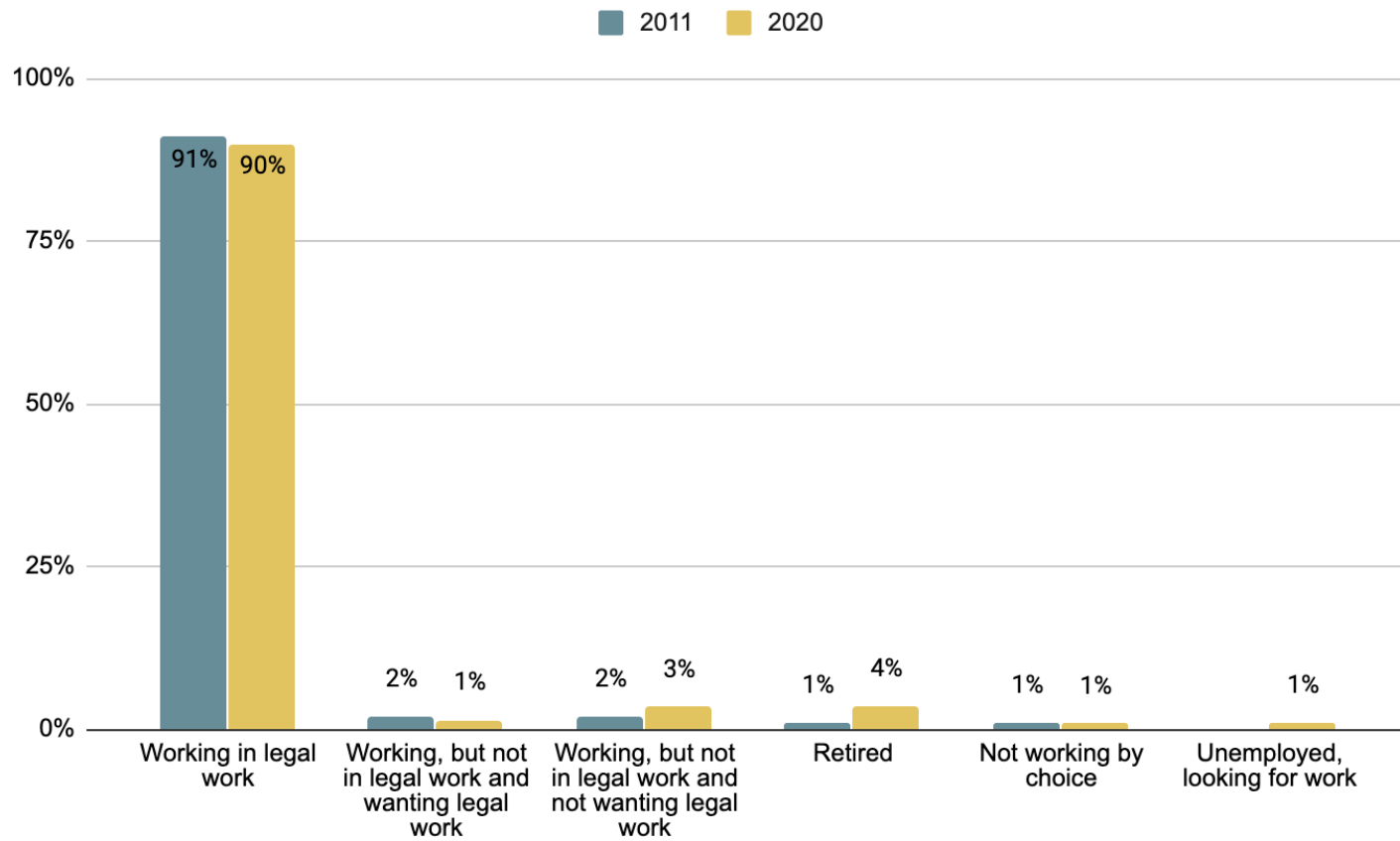
Please indicate your religious preference, if any:



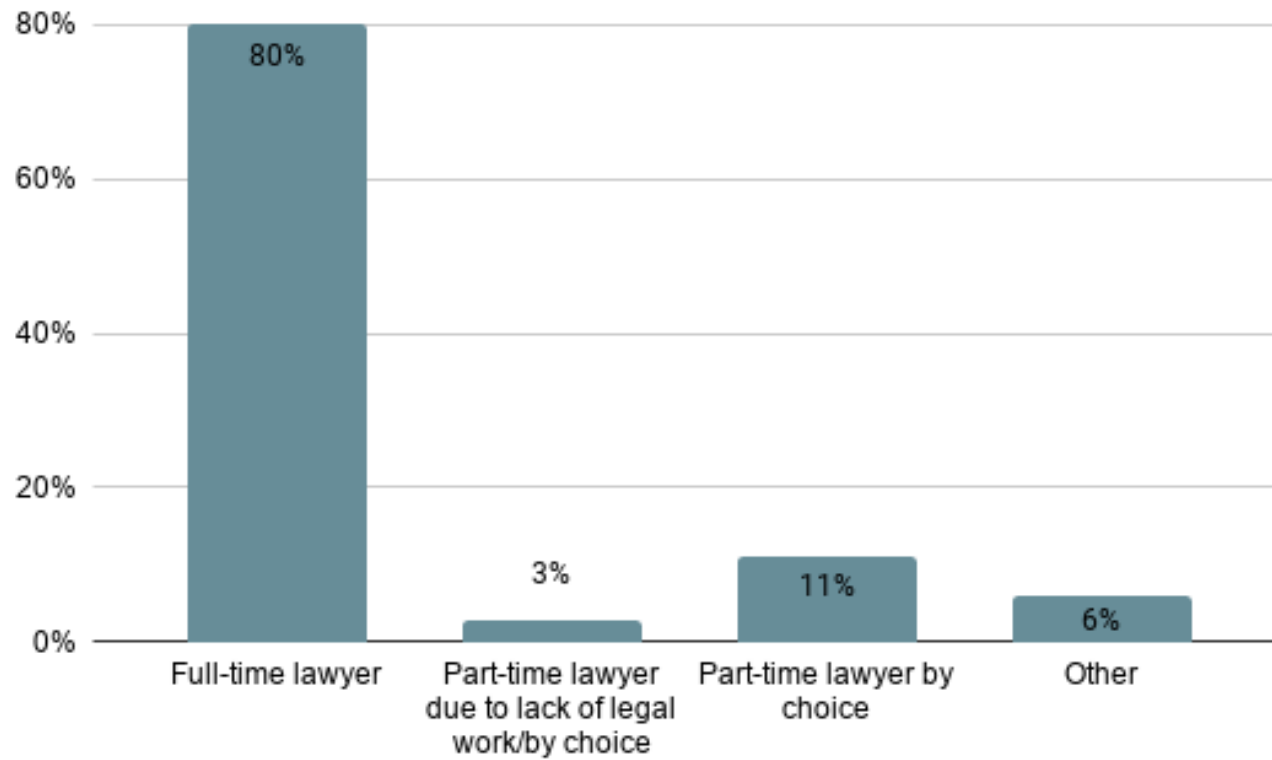
How many years have you been practicing law?



Please select the response that best describes your employment status.

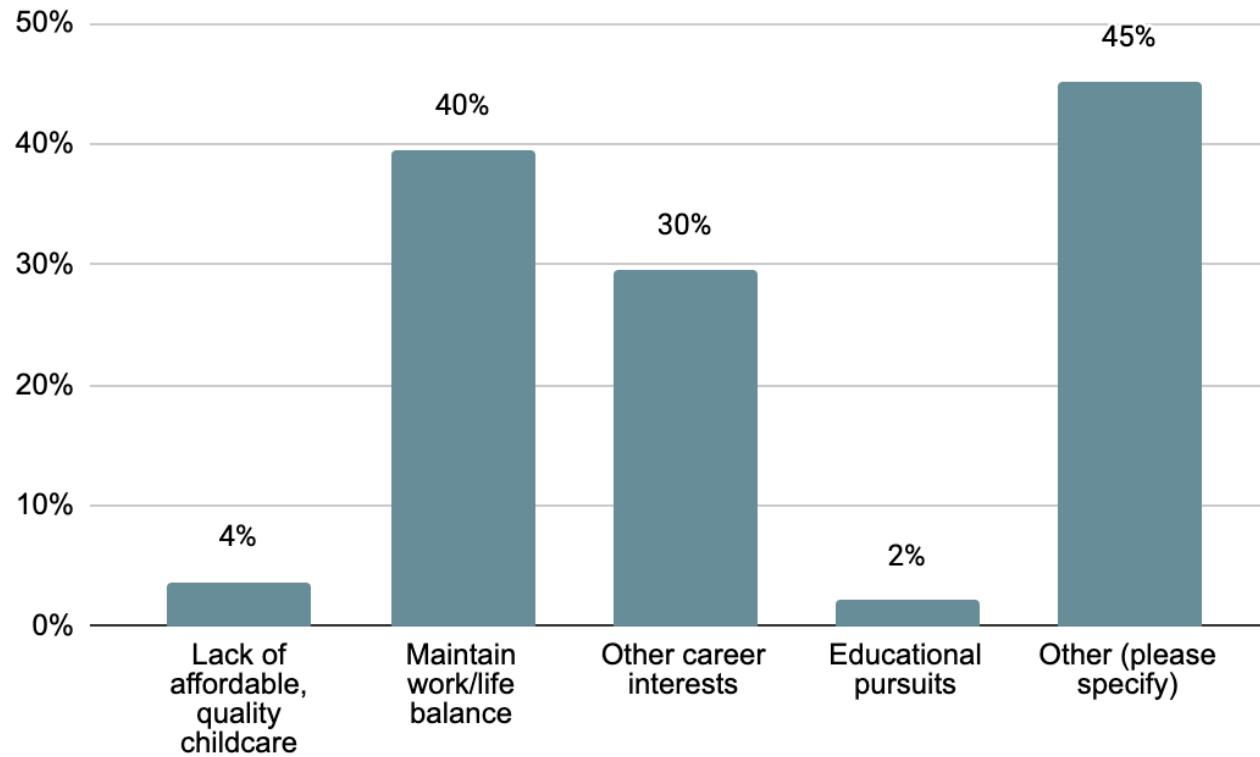


If you're currently working as a lawyer, what best describes your current level of employment?

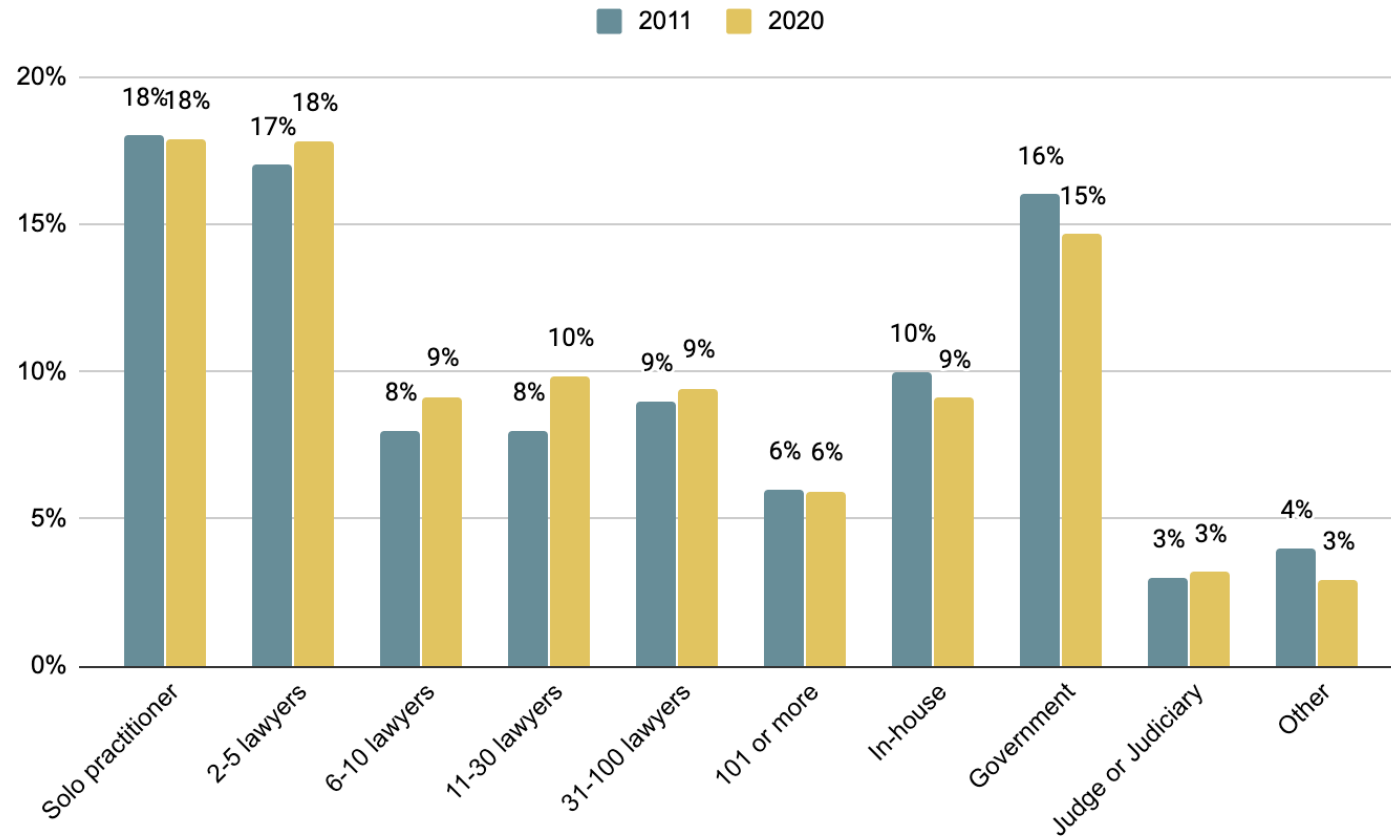


If you are working less than full time as a lawyer is it because of:

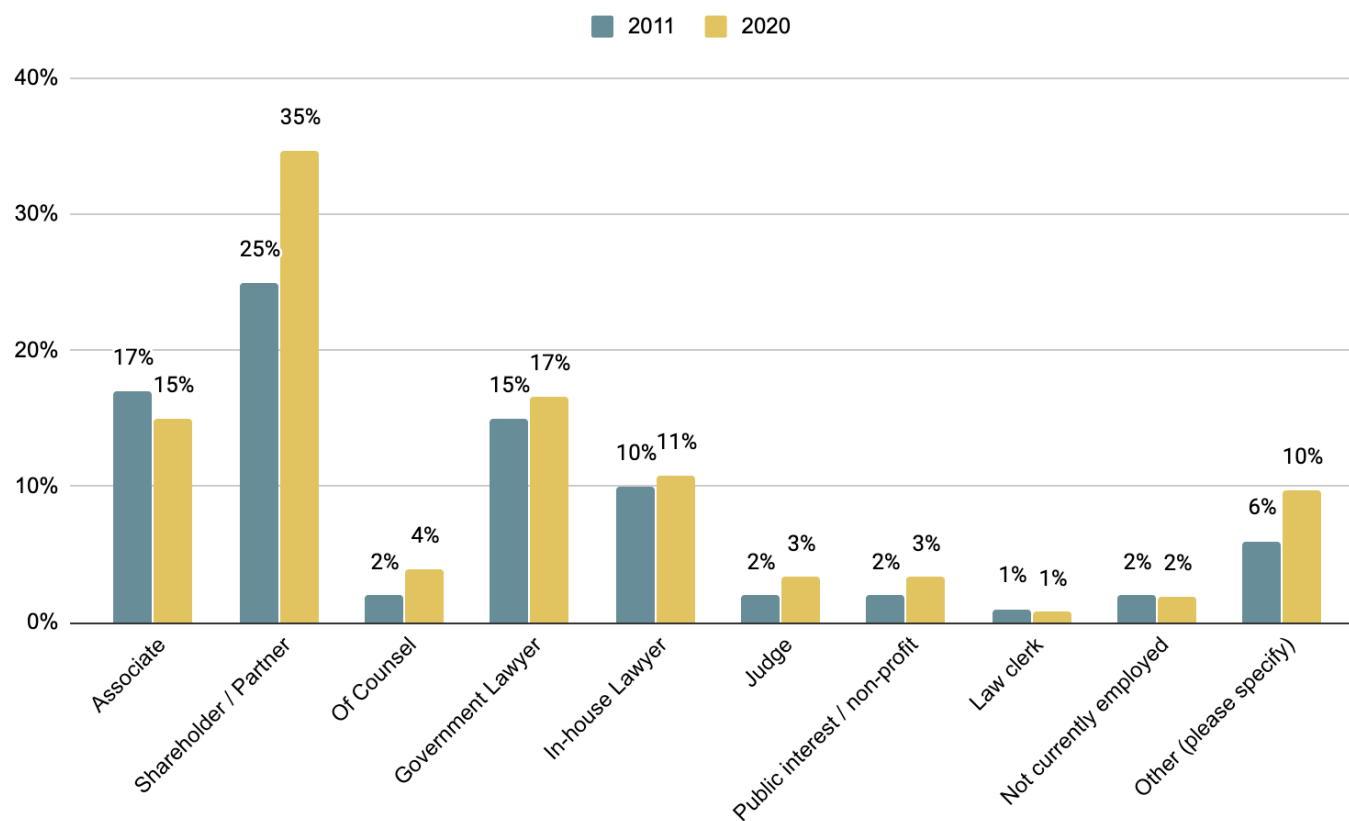
Please select all that apply.



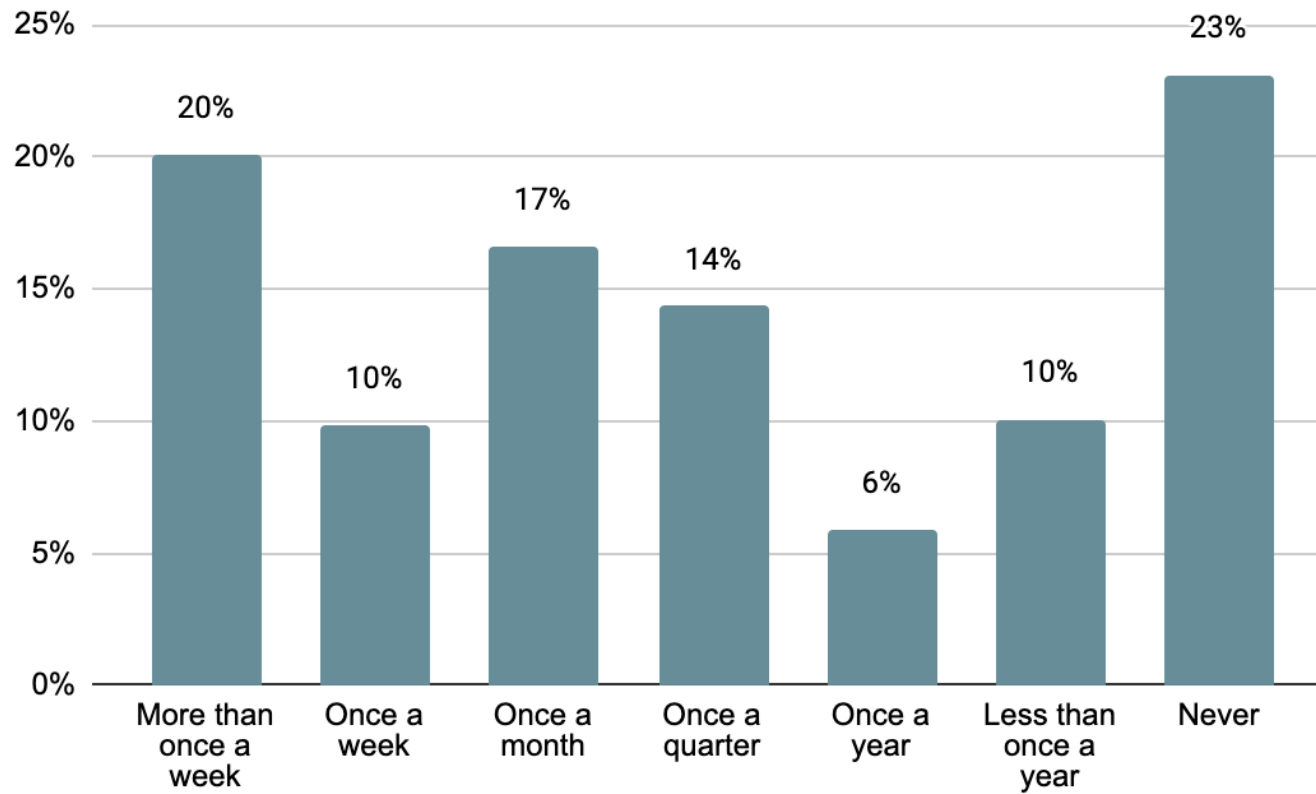
What size / type is your office?



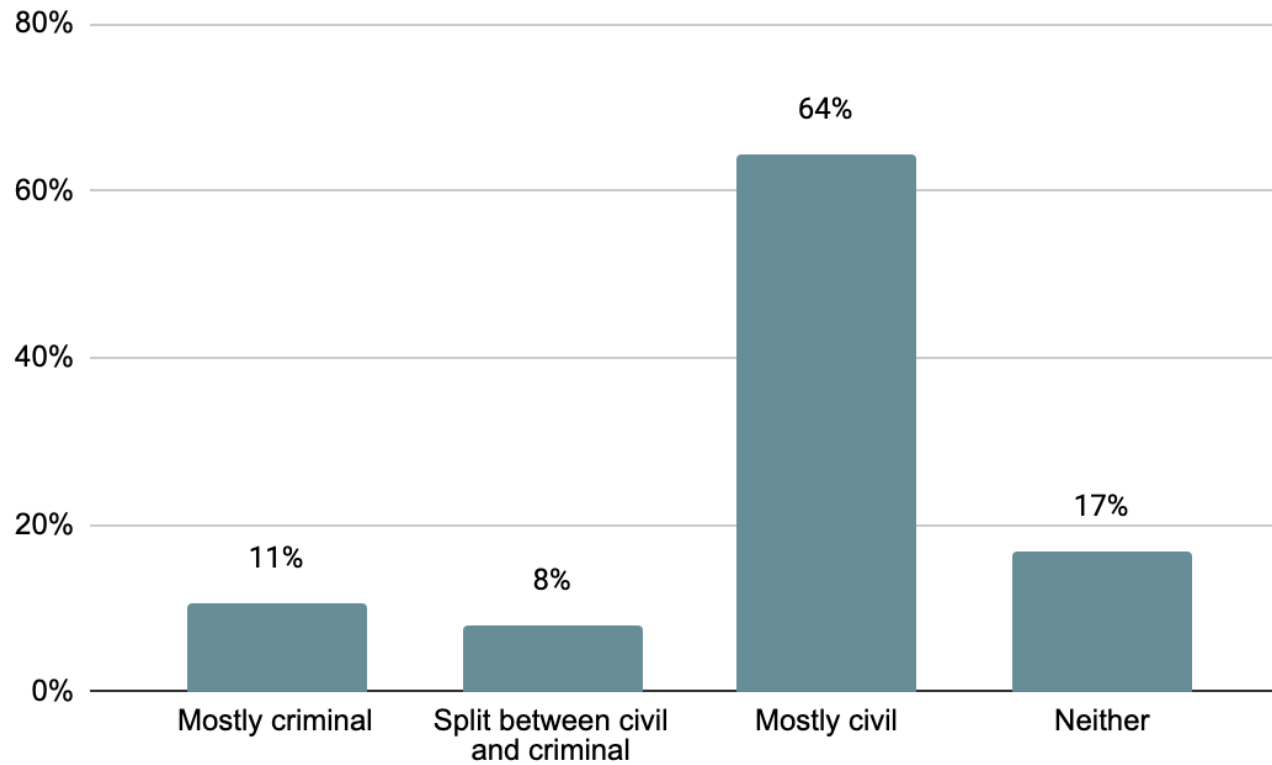
What position do you currently hold?



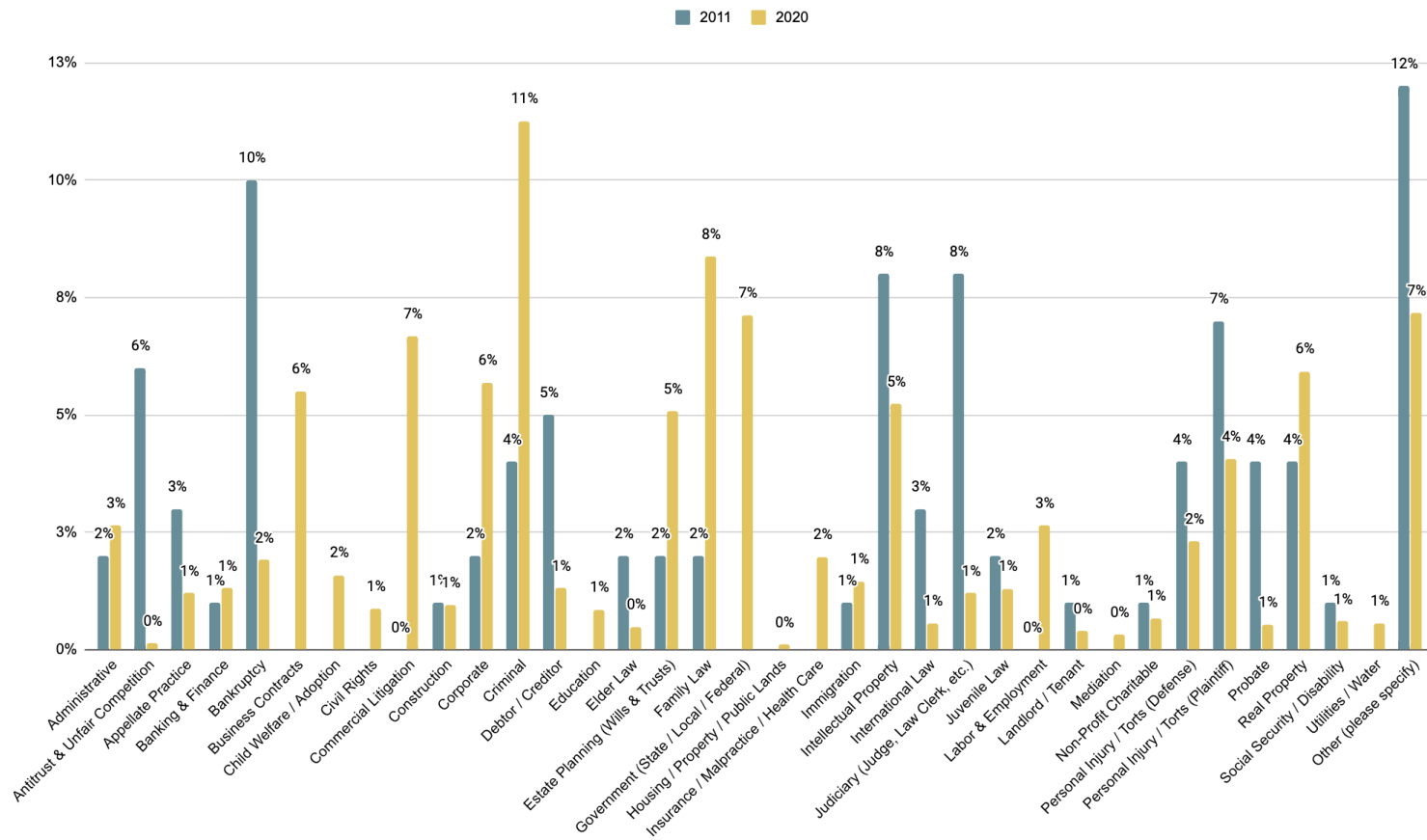
How often do you go to court?



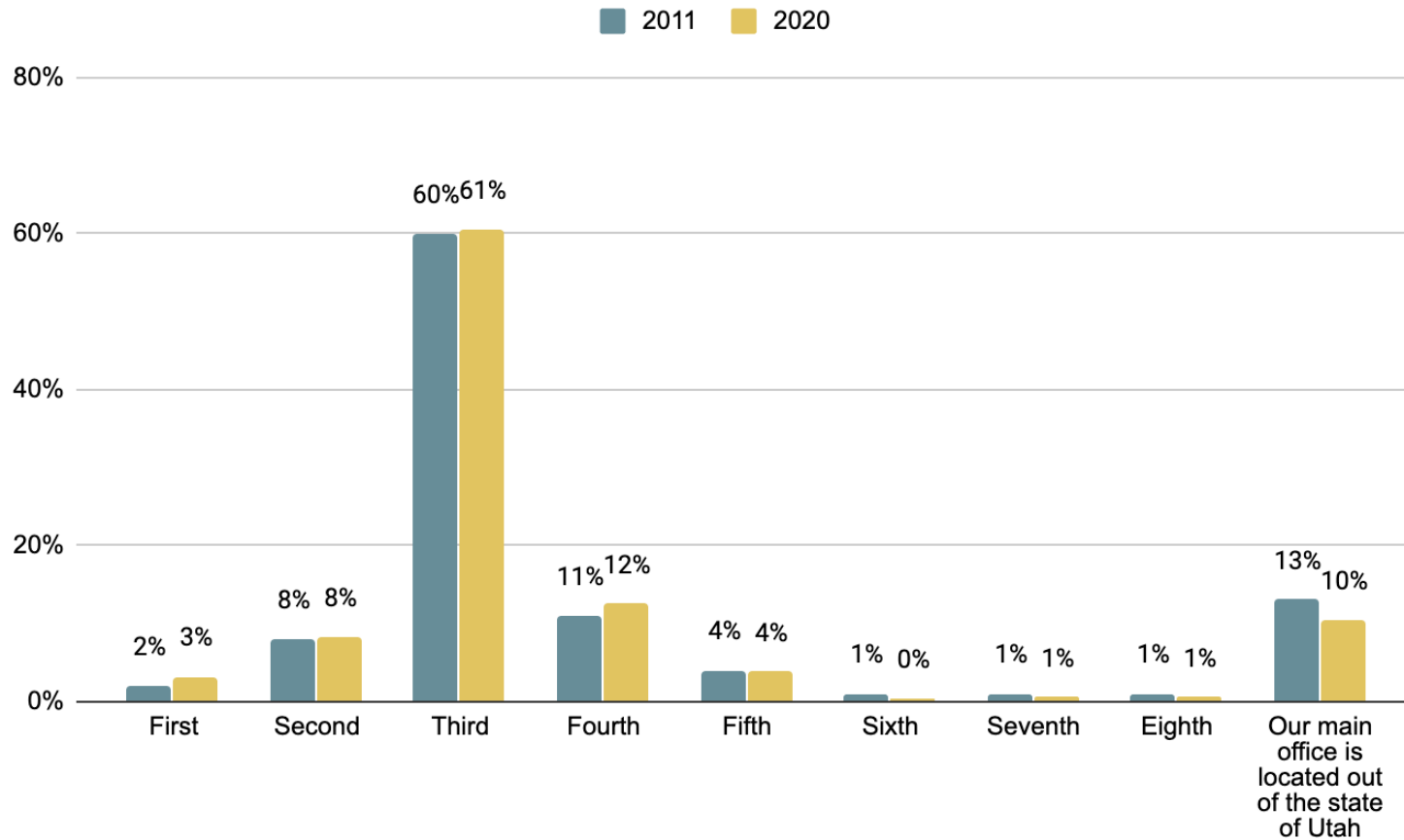
How much of your practice is civil or criminal legal work?



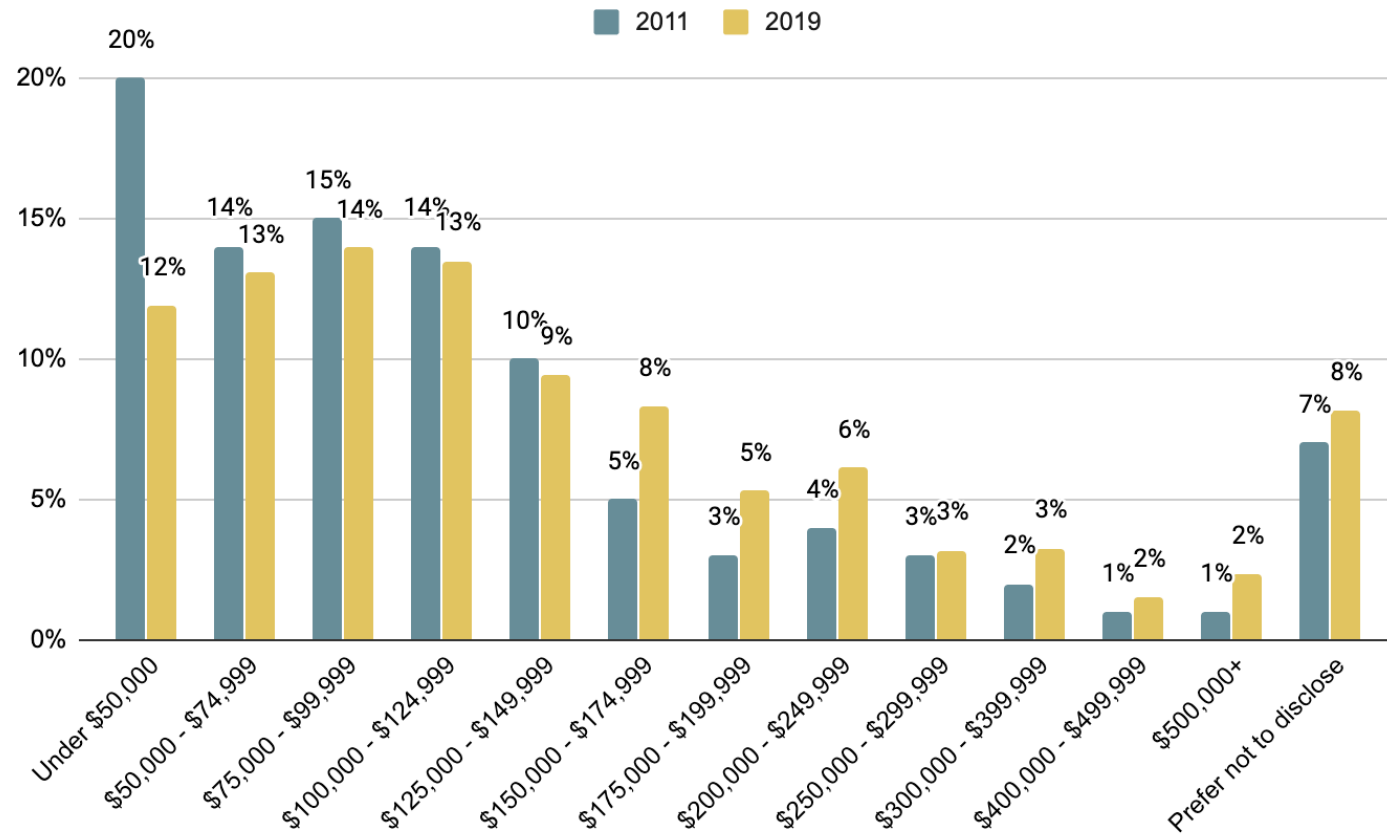
What area of practice represents 50% or more of your practice in the last year?



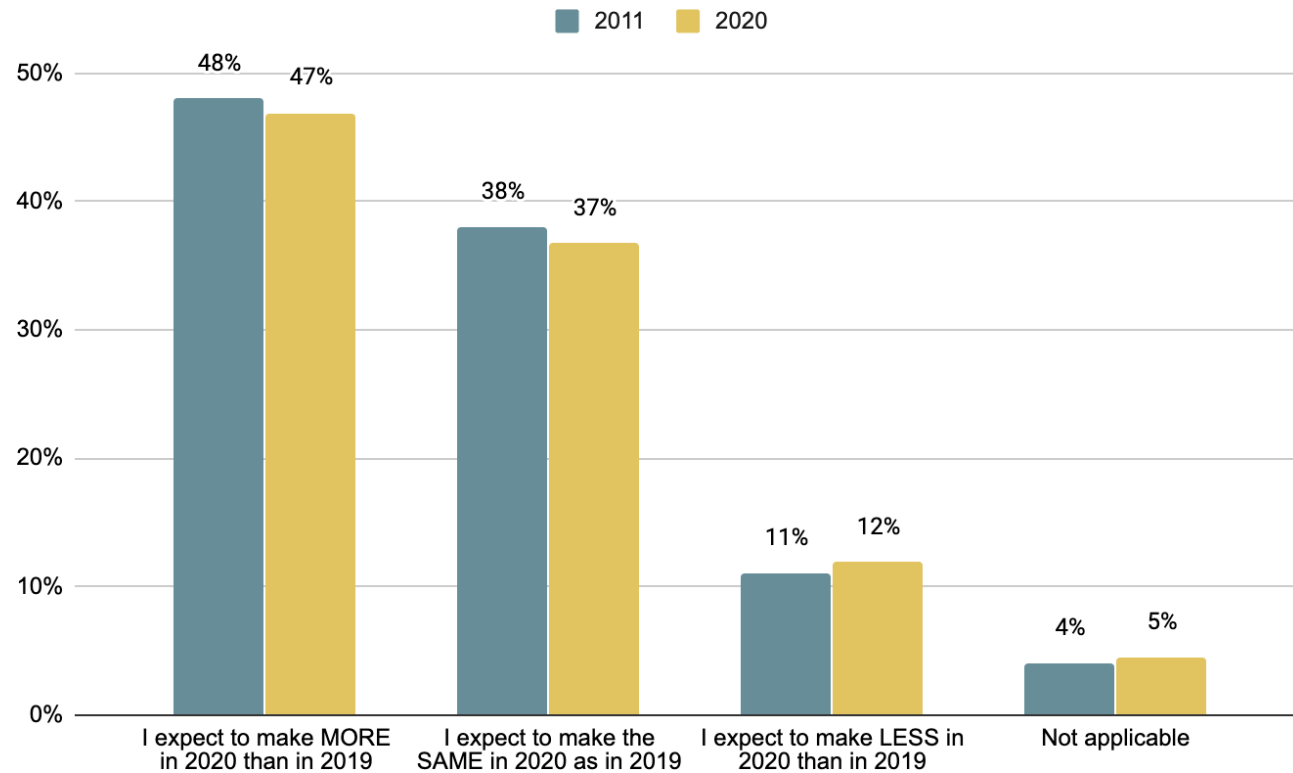
In what Utah judicial district is your main office located?



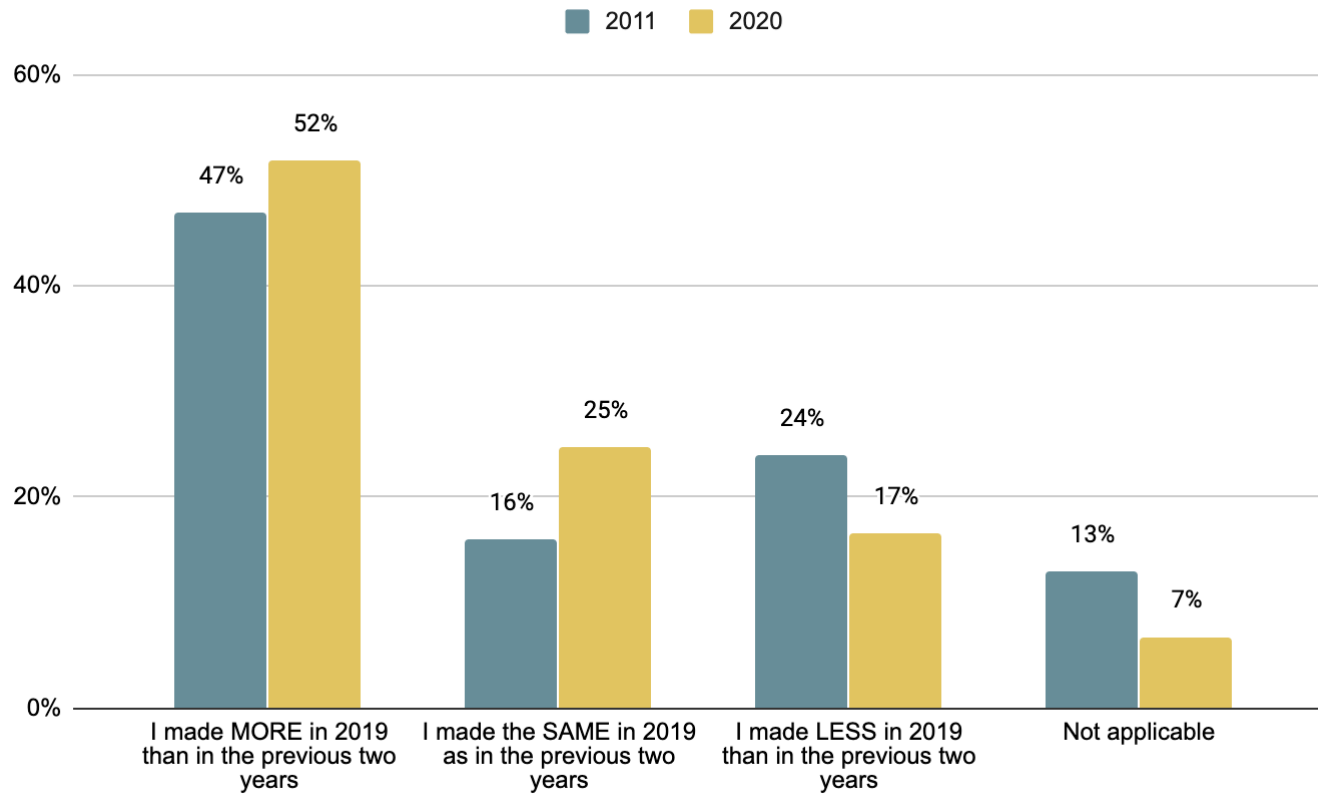
What was your 2019 personal law-related income?



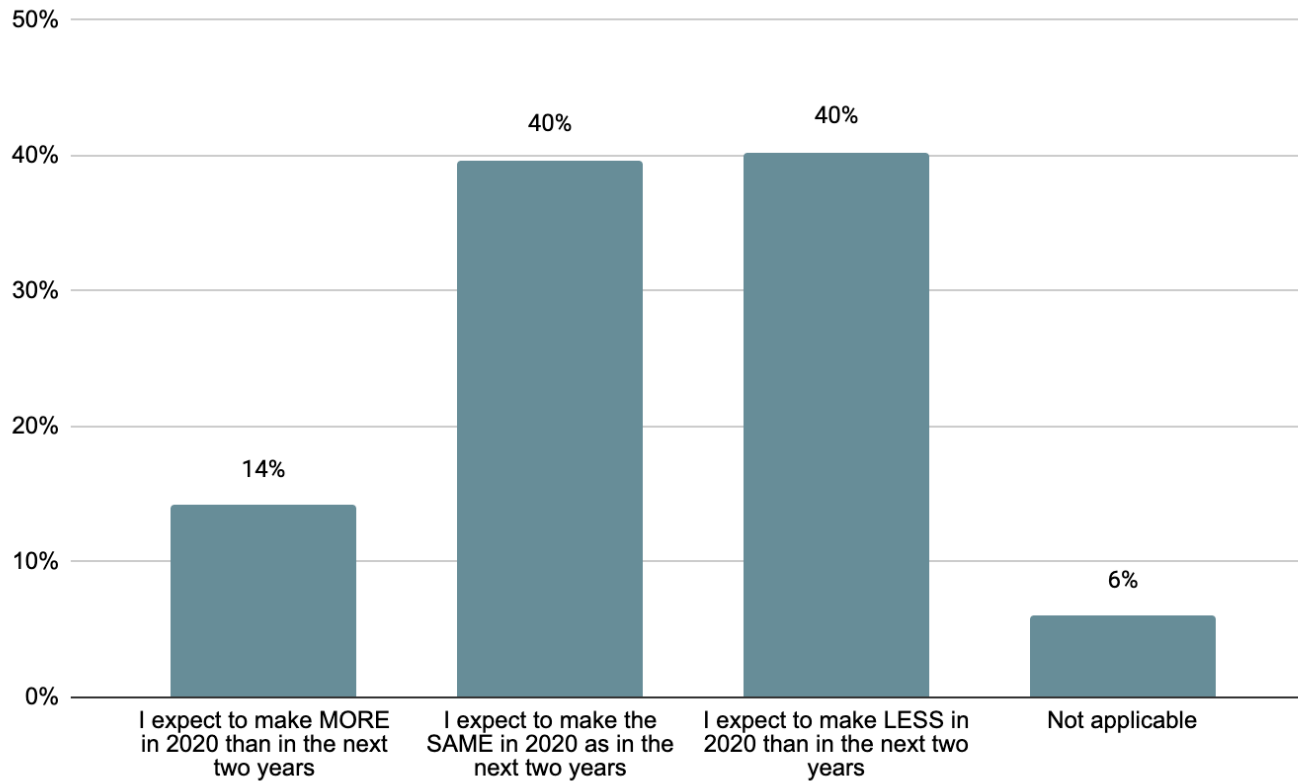
How do you expect your 2020 personal law-related income to compare to what it was in 2019?



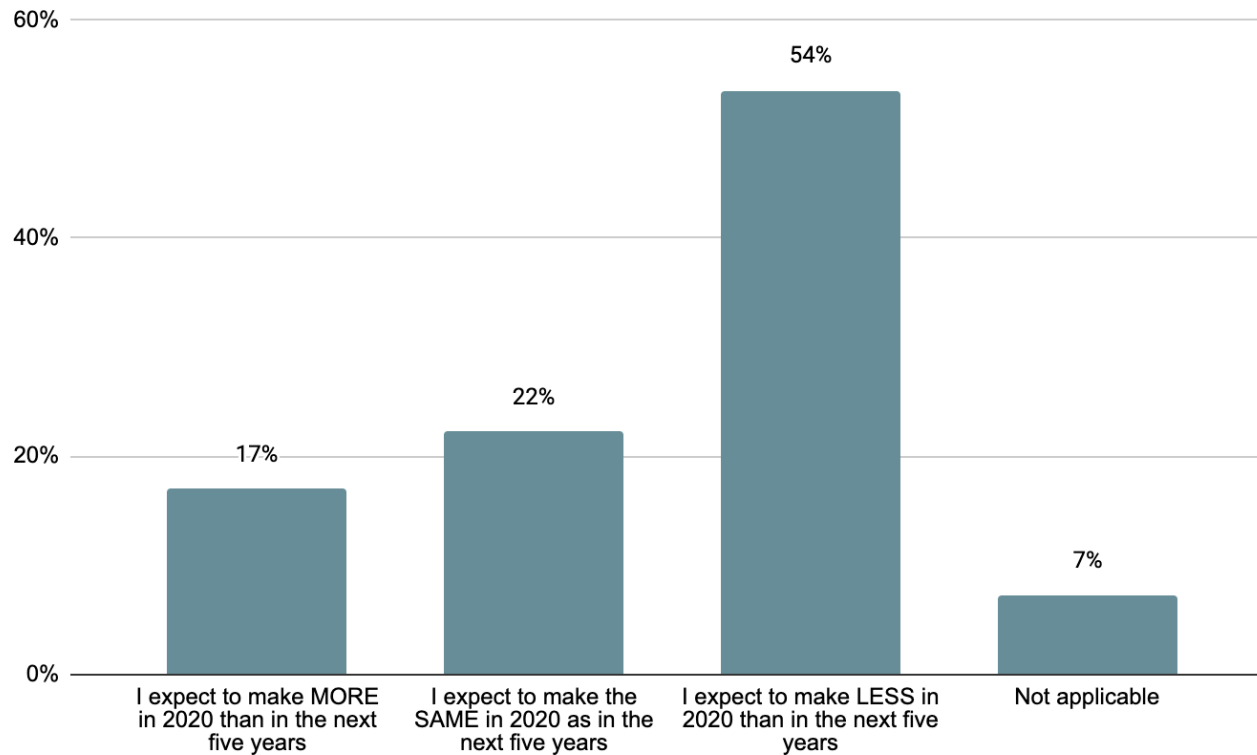
How does your 2019 personal law-related income compare to the previous two years?



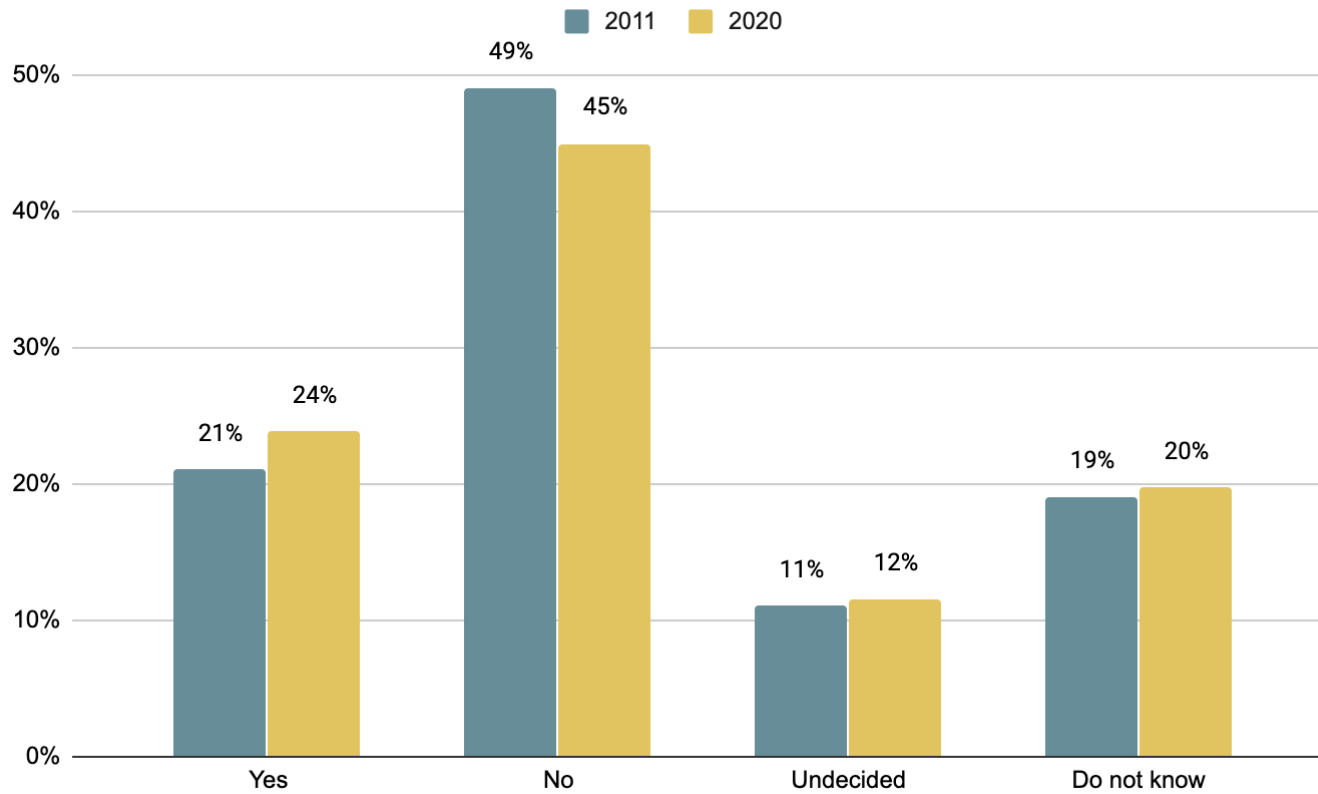
How do you expect your 2020 personal law-related income to compare to what it will be in the next two years?




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



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



Economics



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

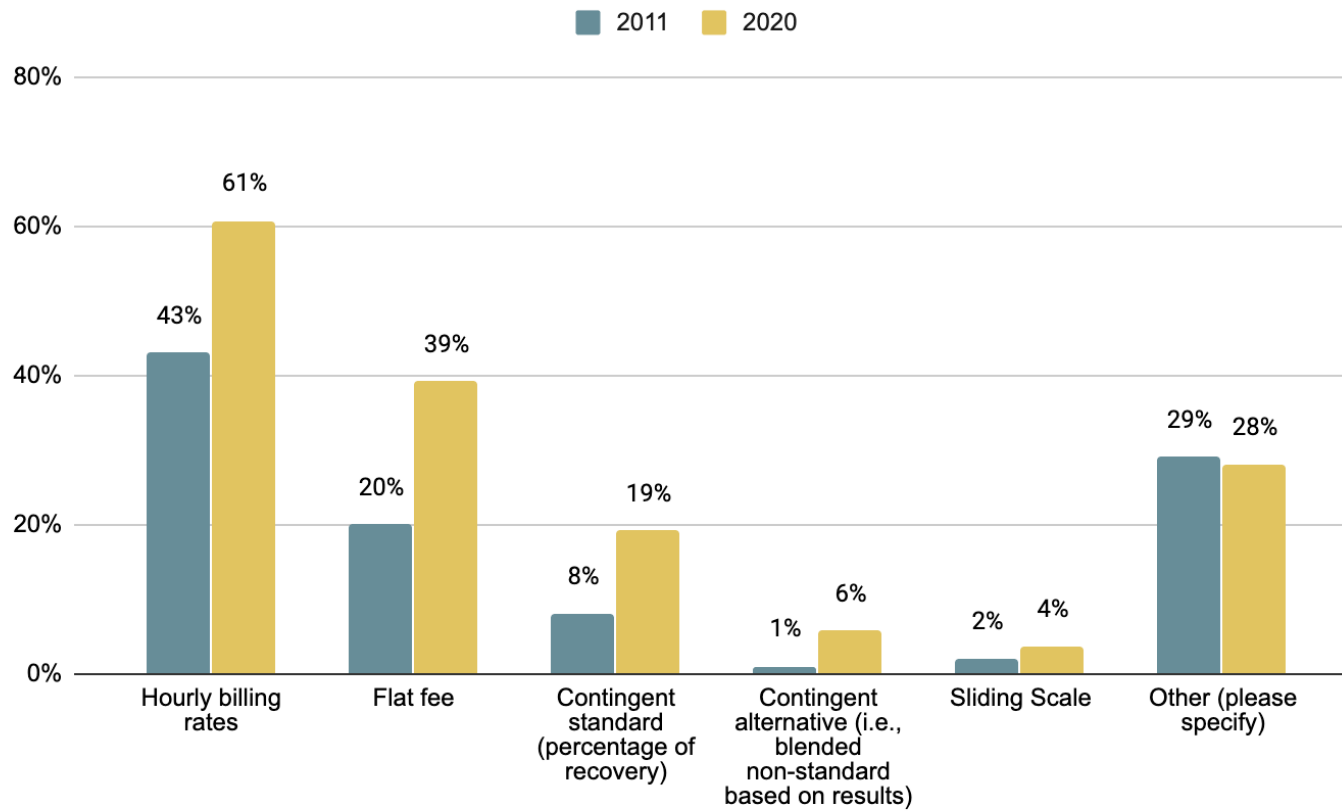
52% of survey respondents worked between 160 and 200 hours per month on average in the past year.

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

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

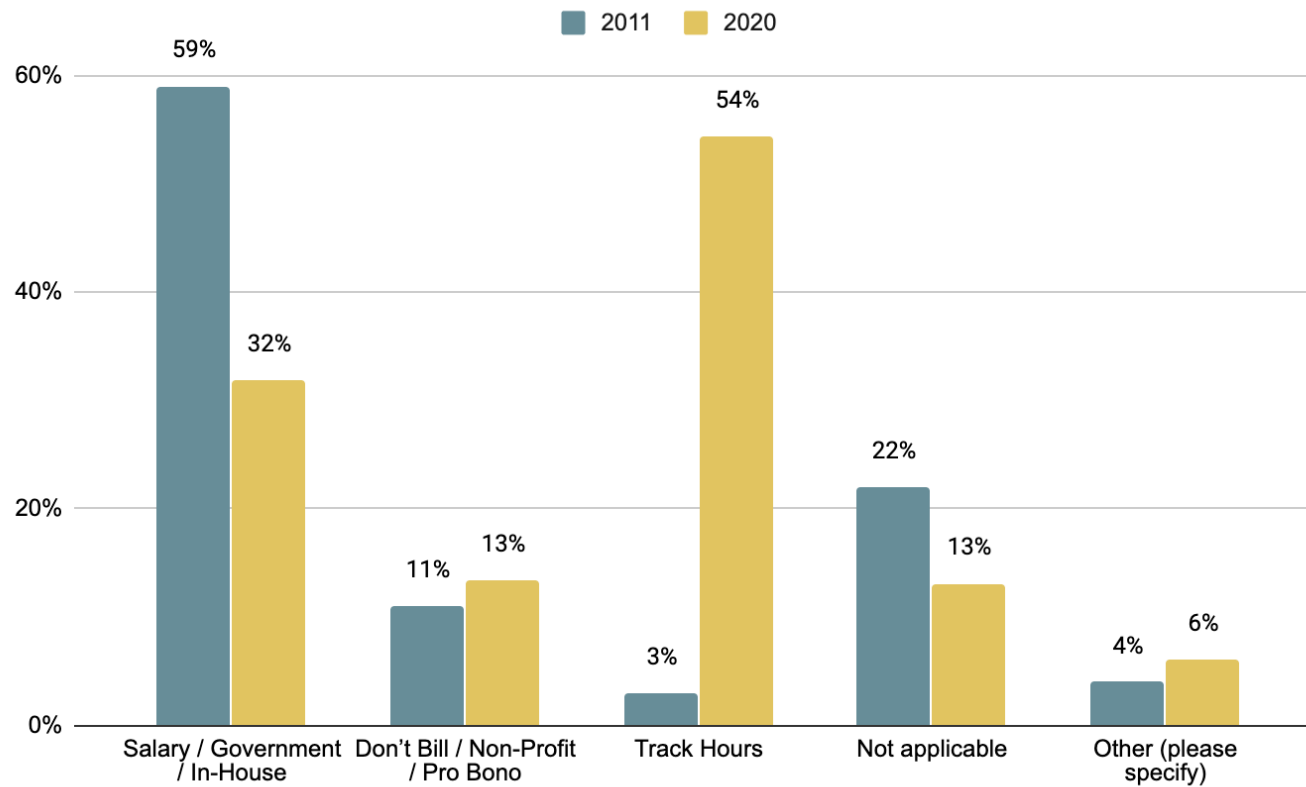
What billing methods have you used this year (by percentage of your practice)?

Please select all that apply.

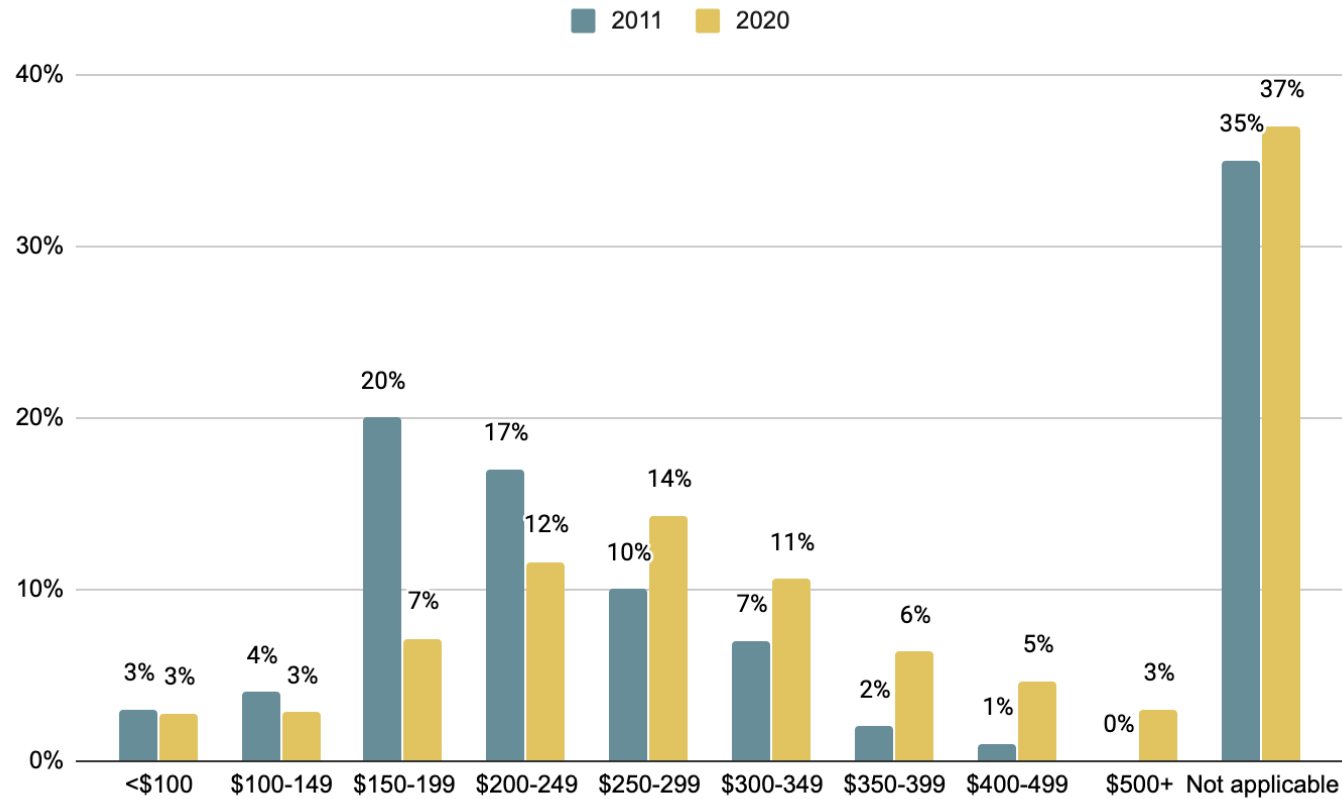


What billing methods have you used this year?

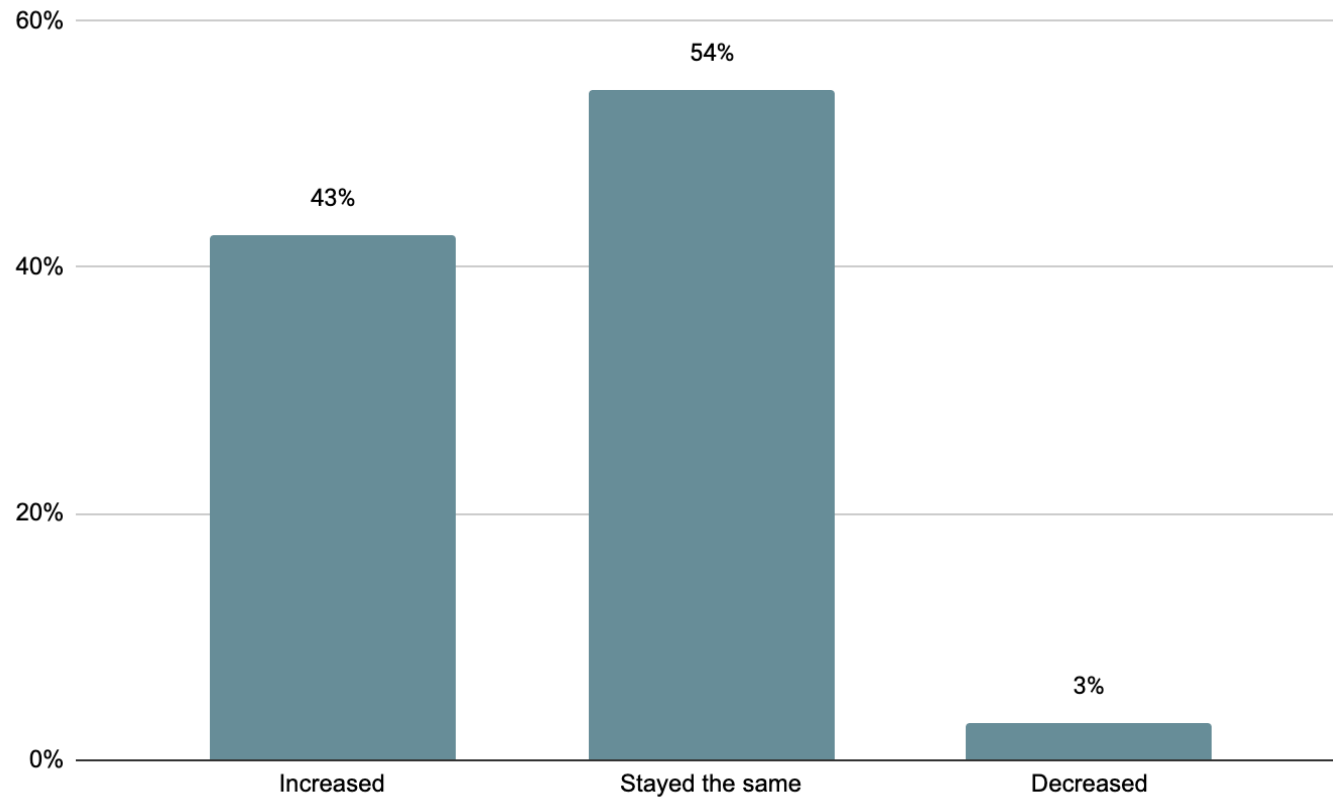
Please select all that apply.



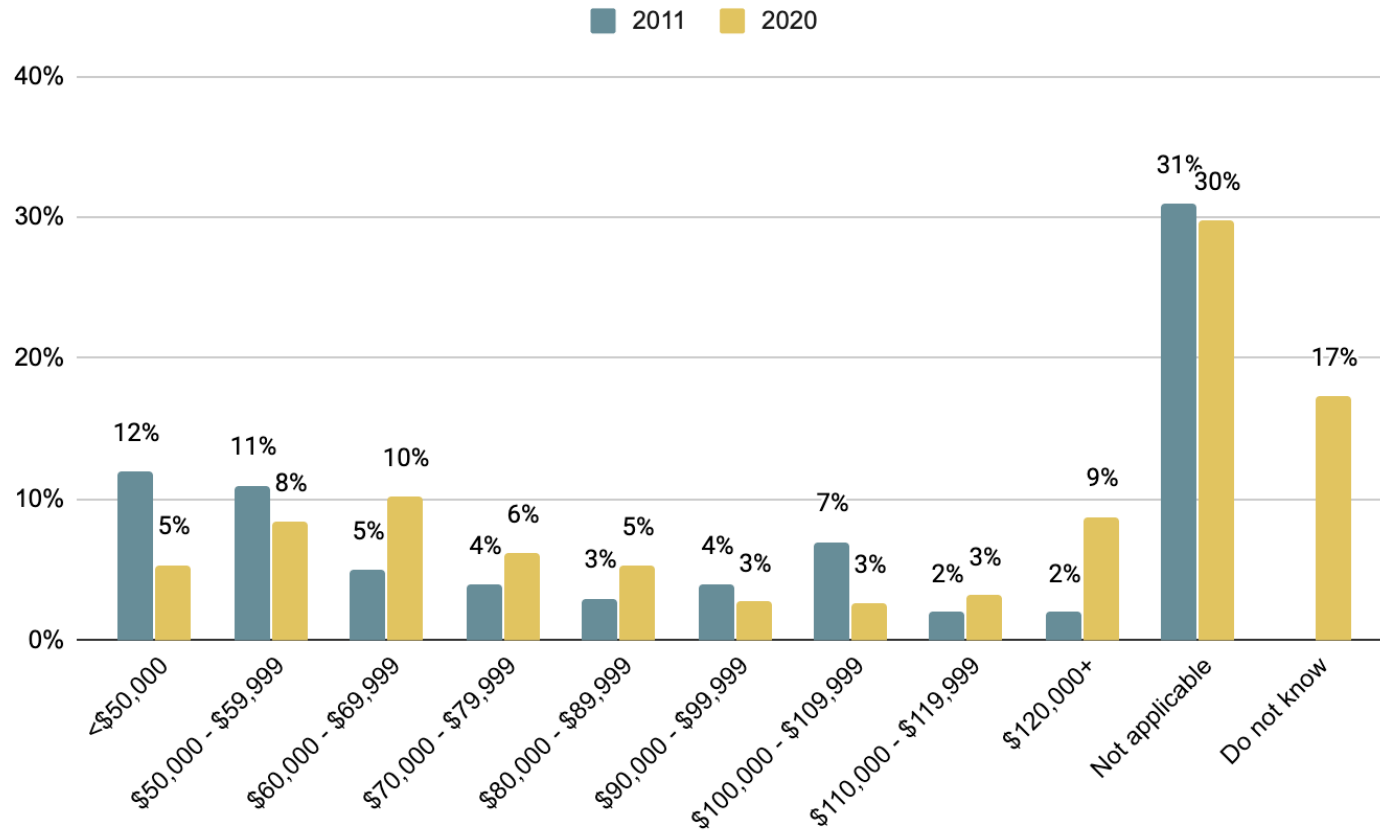
If you charge on an hourly basis, what is your current standard hourly rate?



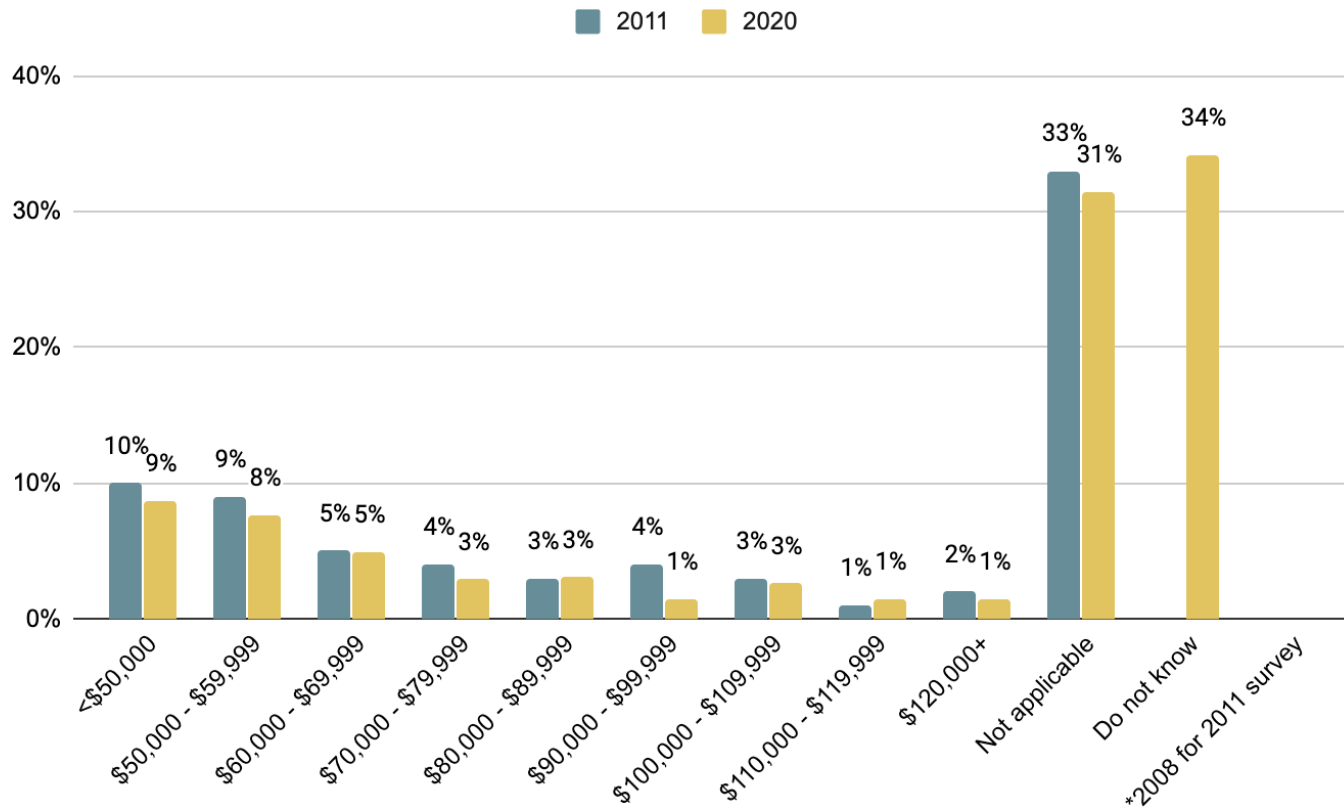
How has your standard hourly billing rate changed over the past two years?



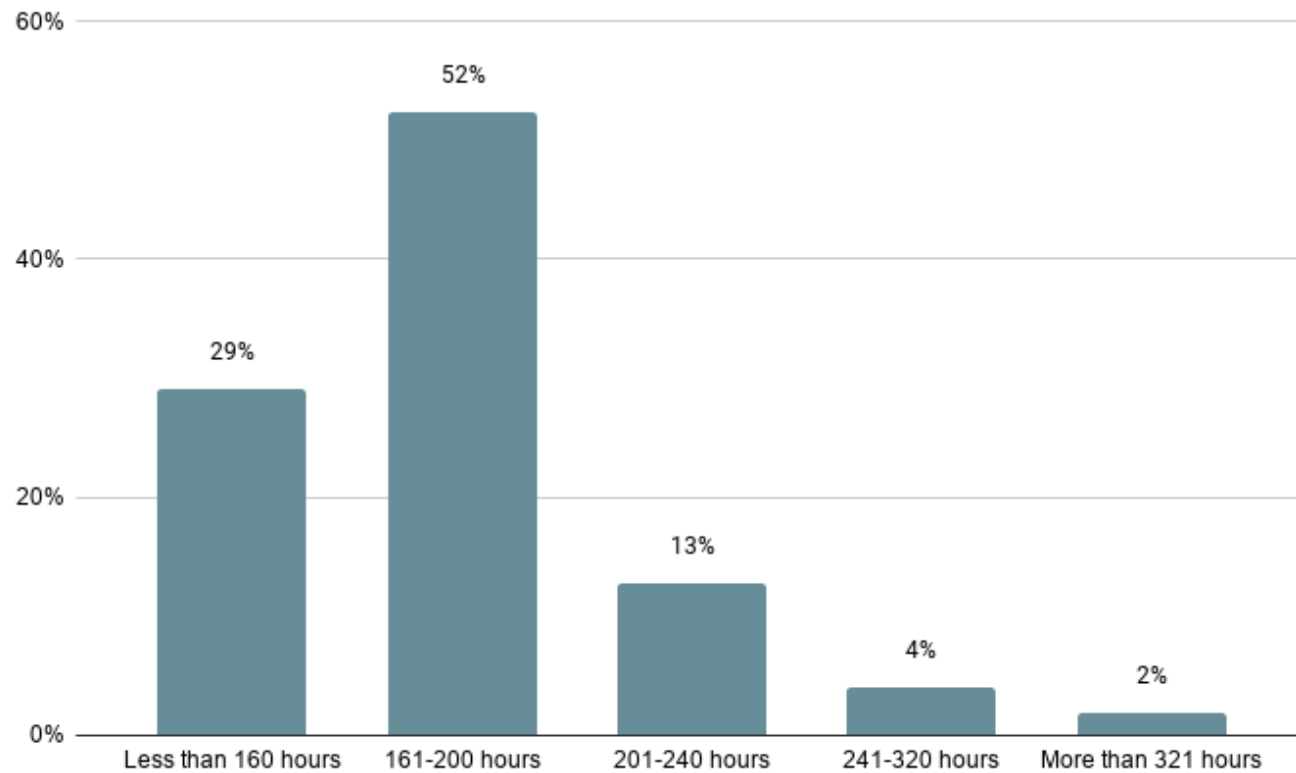
What is the current starting annual salary for lawyers in your law firm or office?



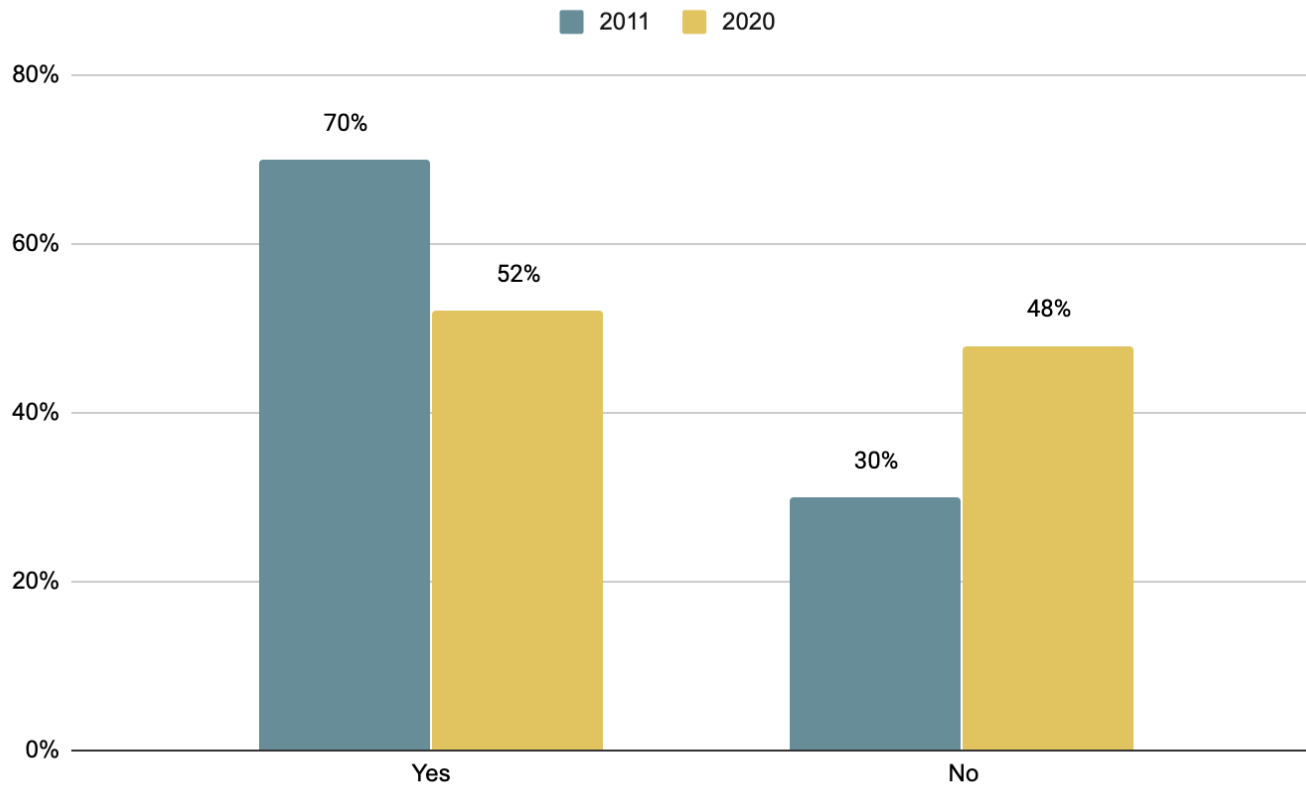
What was the starting annual salary for lawyers in your law firm or office in 2010?



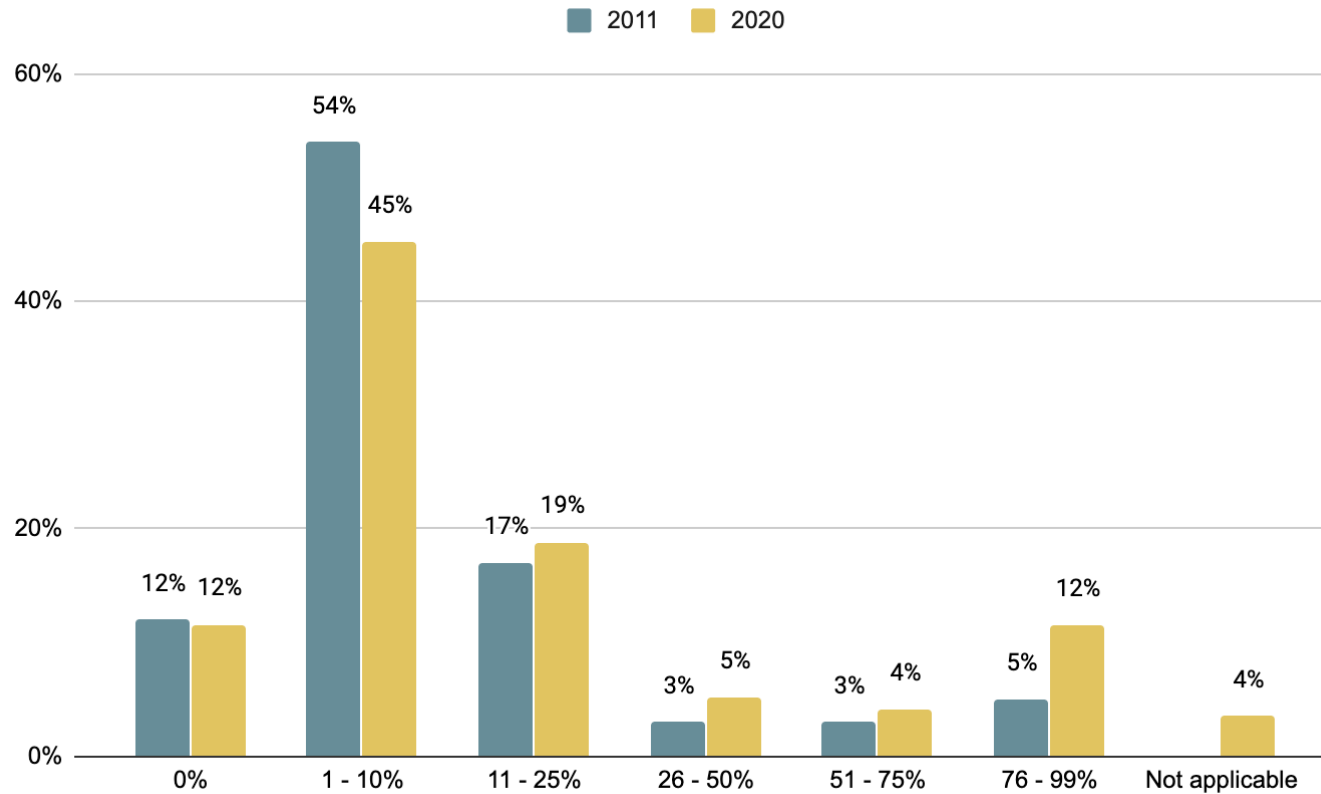
On average, how many hours per month did you work in the past year (including and non-billable hours)?



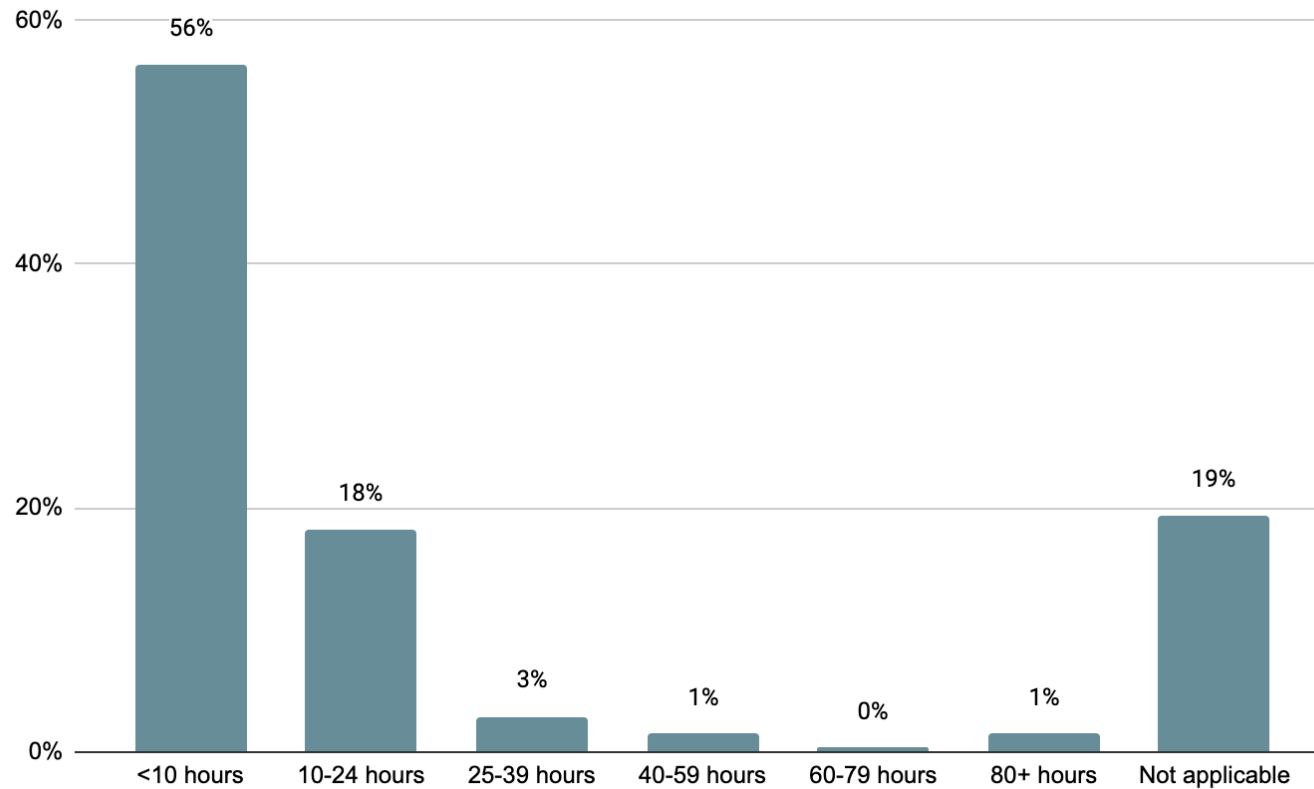
Do you keep track of your hours worked (including billable and non-billable hours as well as non-billable time)?



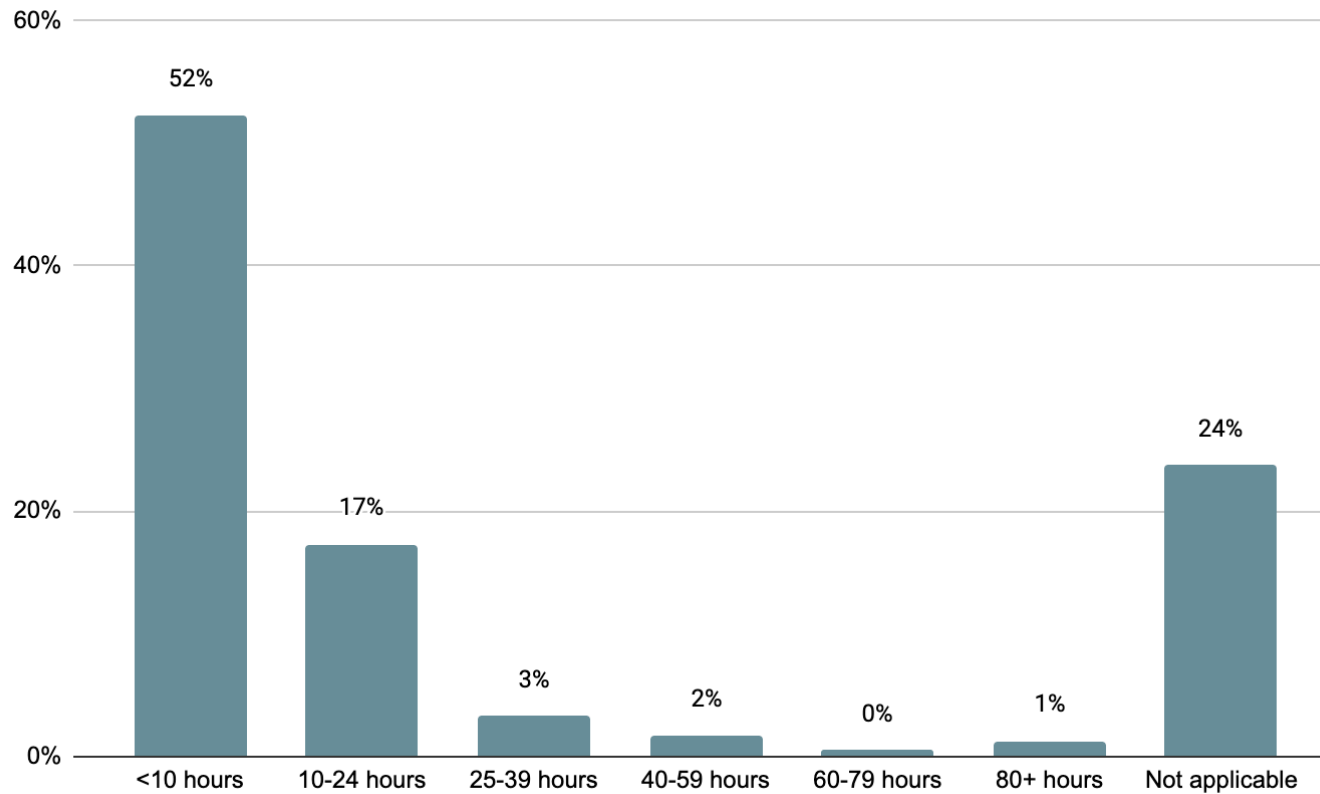
Of your total average hours worked per month, what percentage of your time is spent working from home?



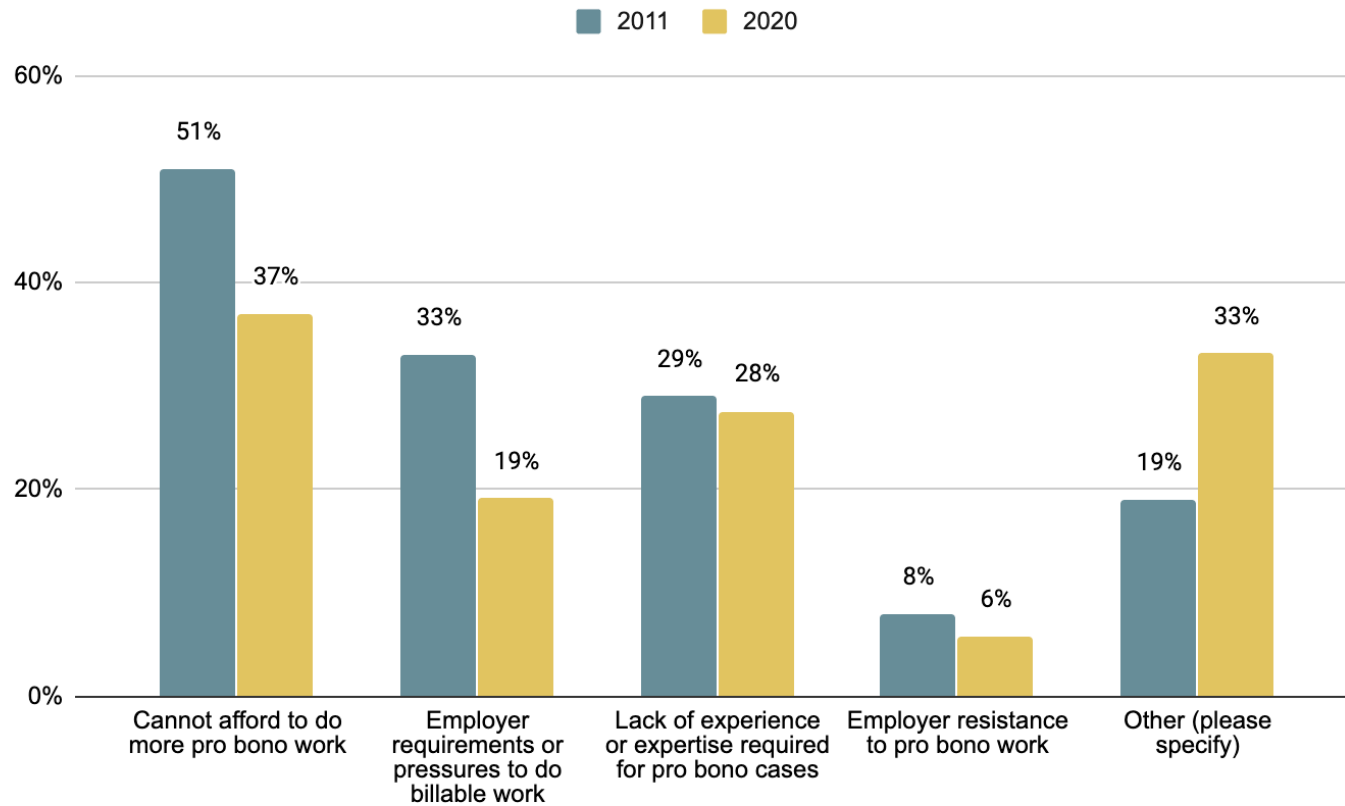
Of your total average hours worked per month, how many hours were pro bono legal services?



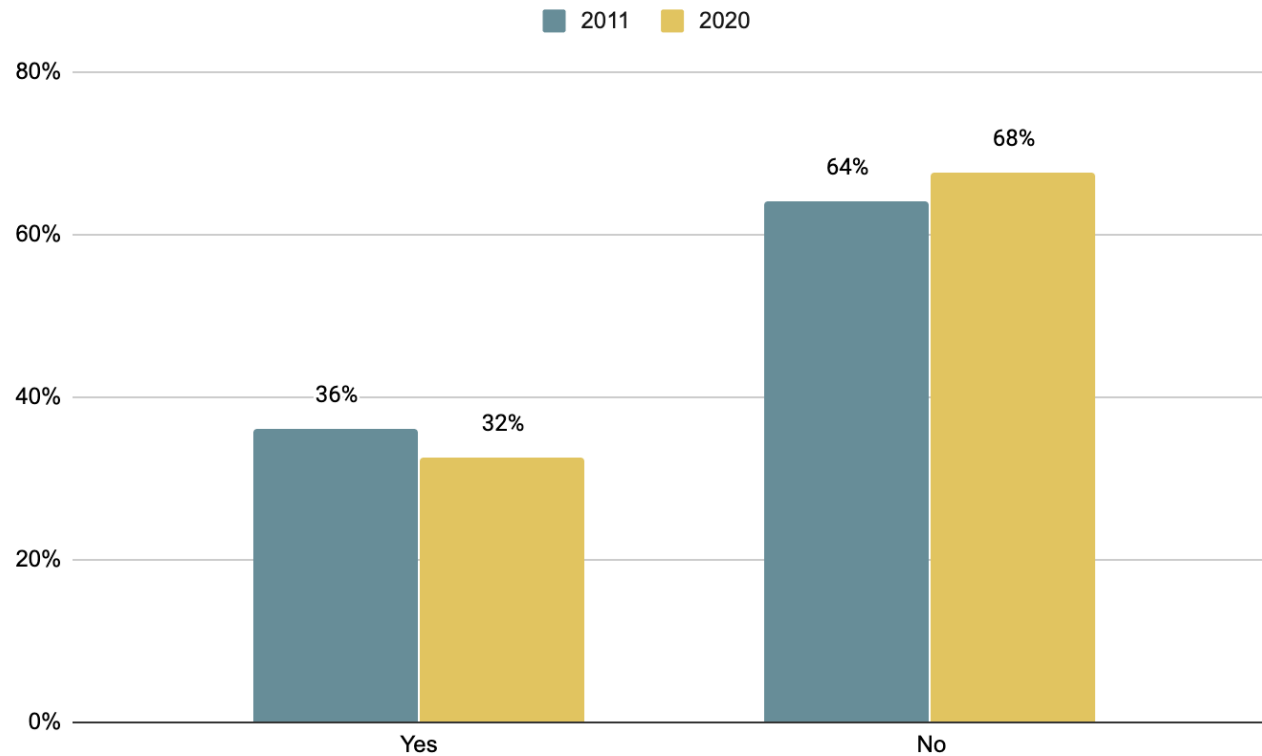
Of your total average hours worked per month, how many hours were volunteer for charitable organizations, churches or other community services?



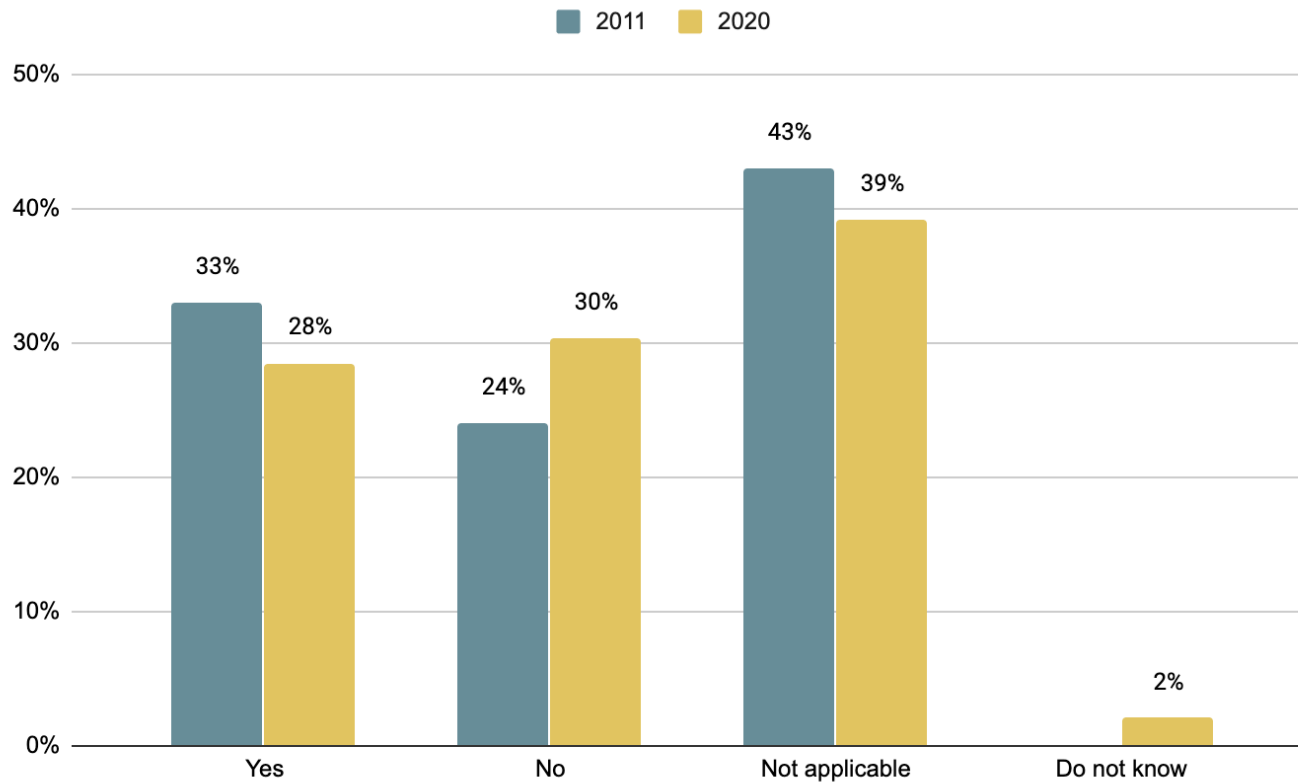
What are the biggest obstacles keeping you from doing more pro bono work? Please select all that apply.



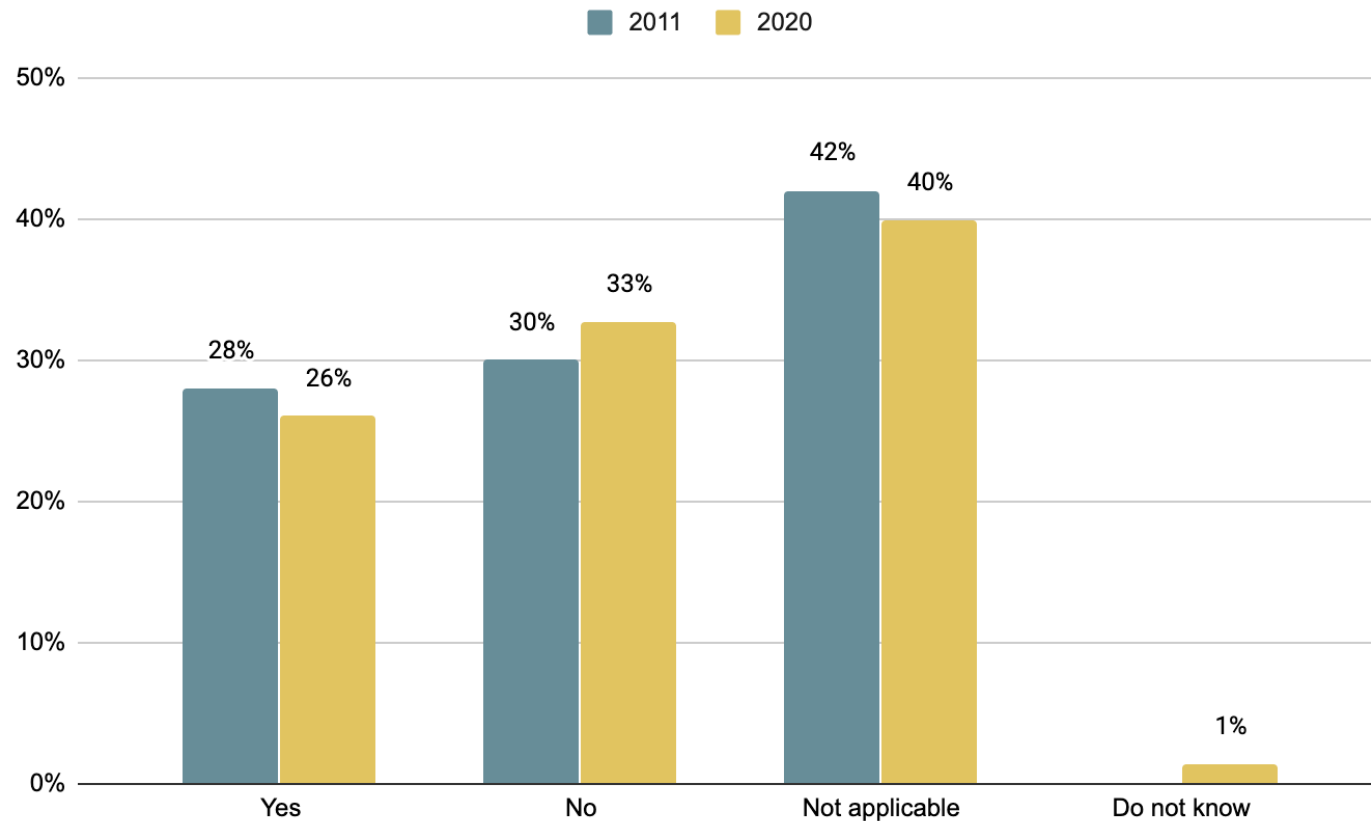
In the last two years, have you made a donation to And Justice For All, or to another organization supporting legal representation to the underserved?



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

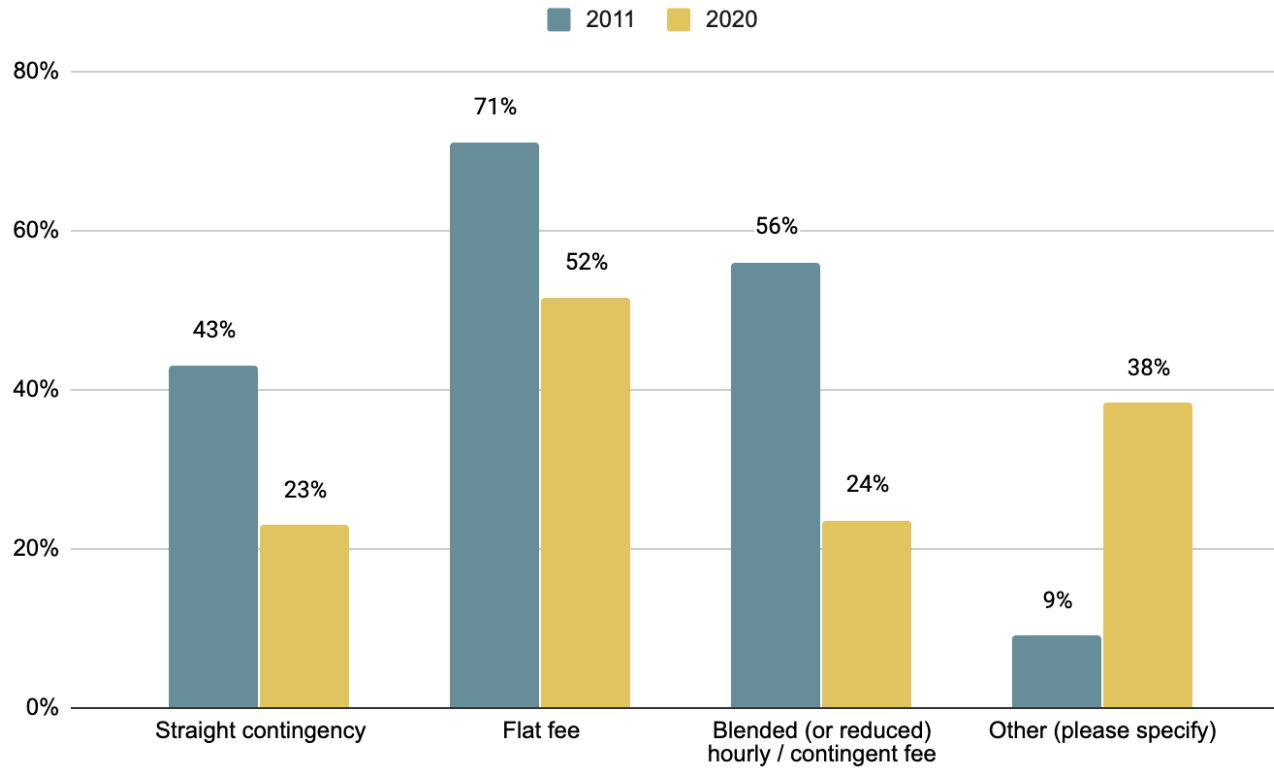


Other than for plaintiff personal injury work, have you OFFERED OR ACCEPTED litigation matters in the past two years on a fee arrangement other than straight hourly?

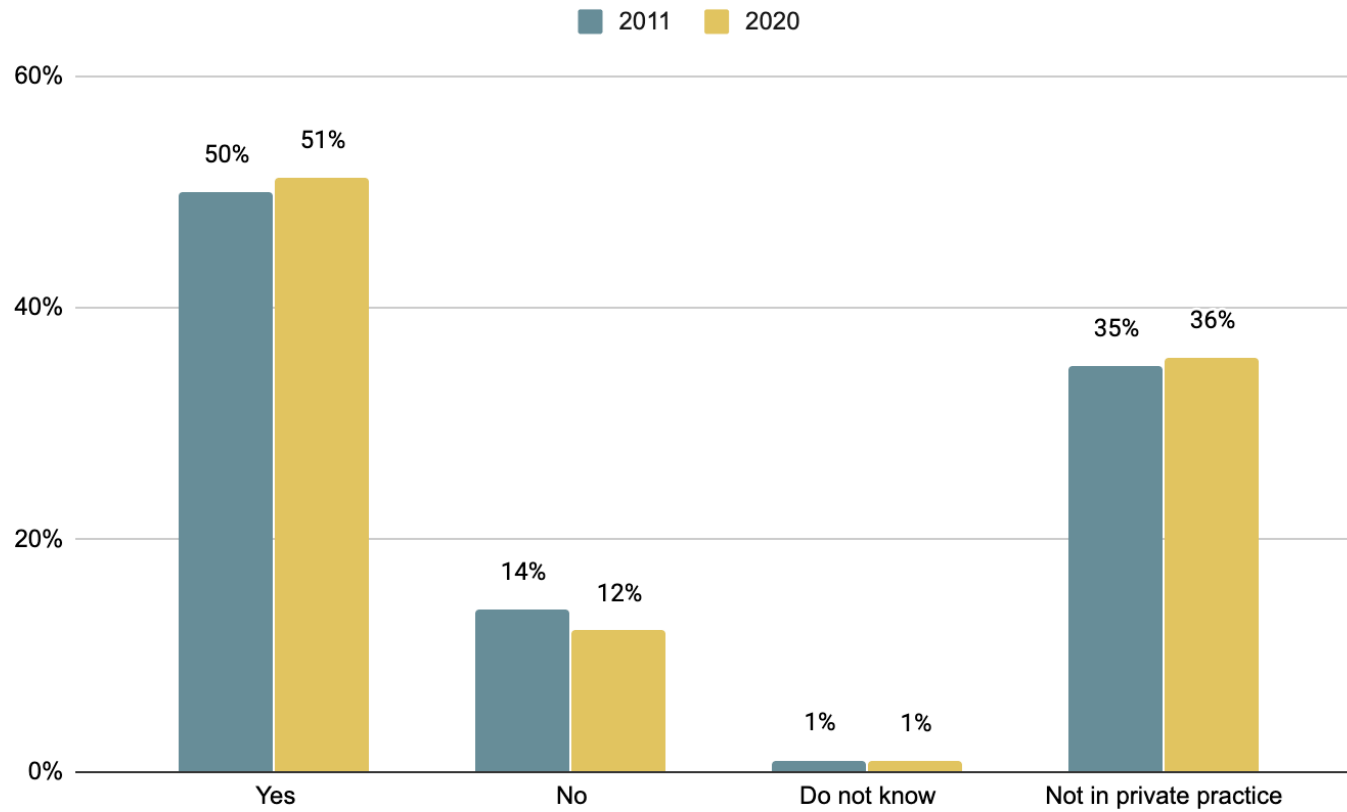


Identify the billing arrangements you have agreed to in the past two years.

Please select all that apply.

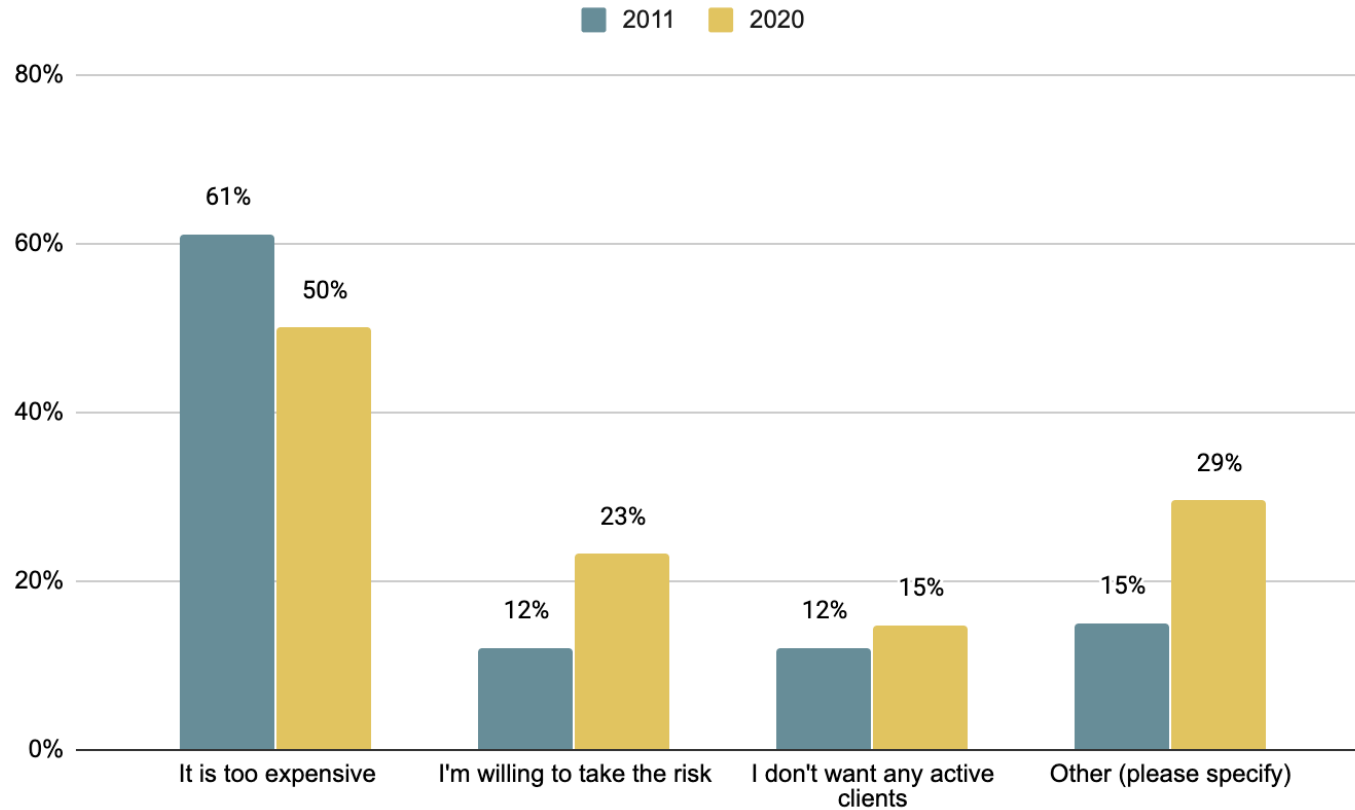


If you are in private practice, do you have professional liability insurance?



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

Please select all that apply.




Job Satisfaction & Expectations



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

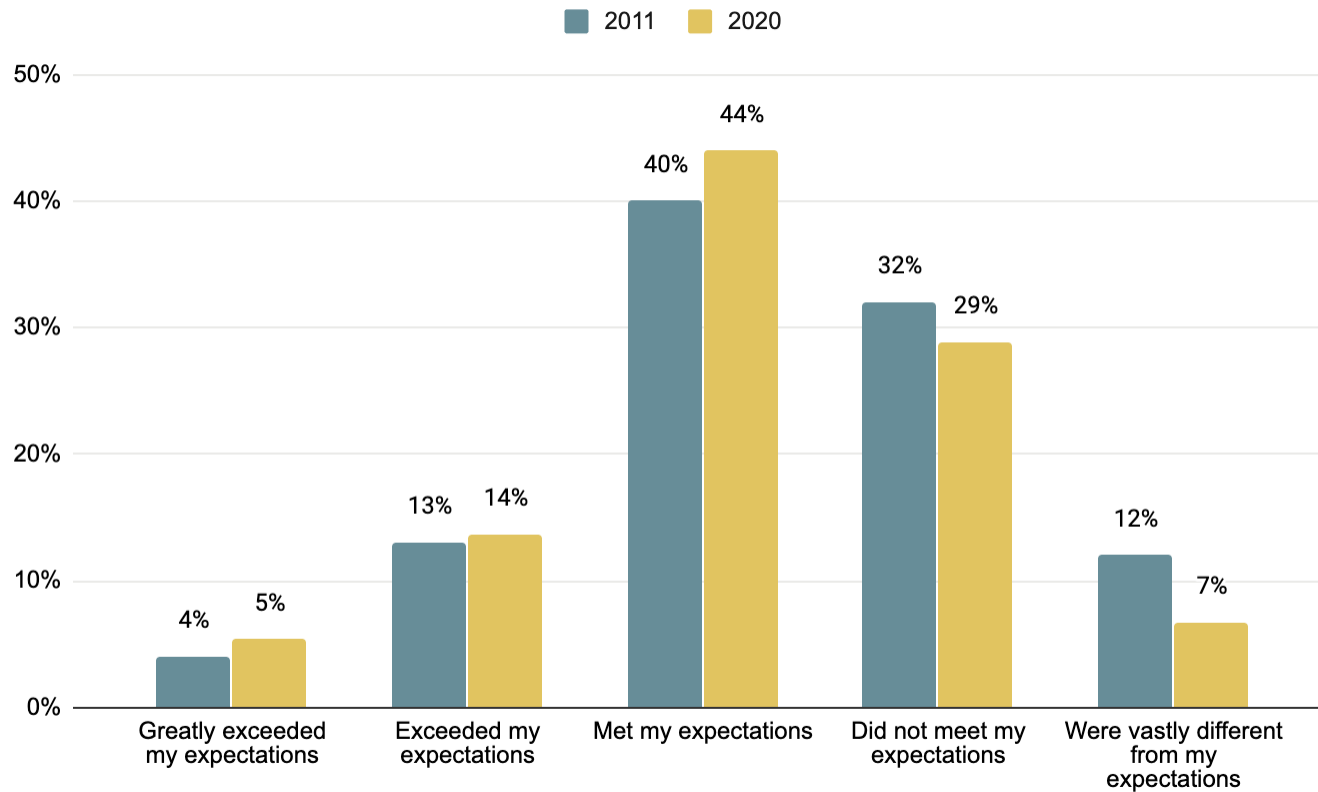
55% say it's very likely while 27% say it's likely.



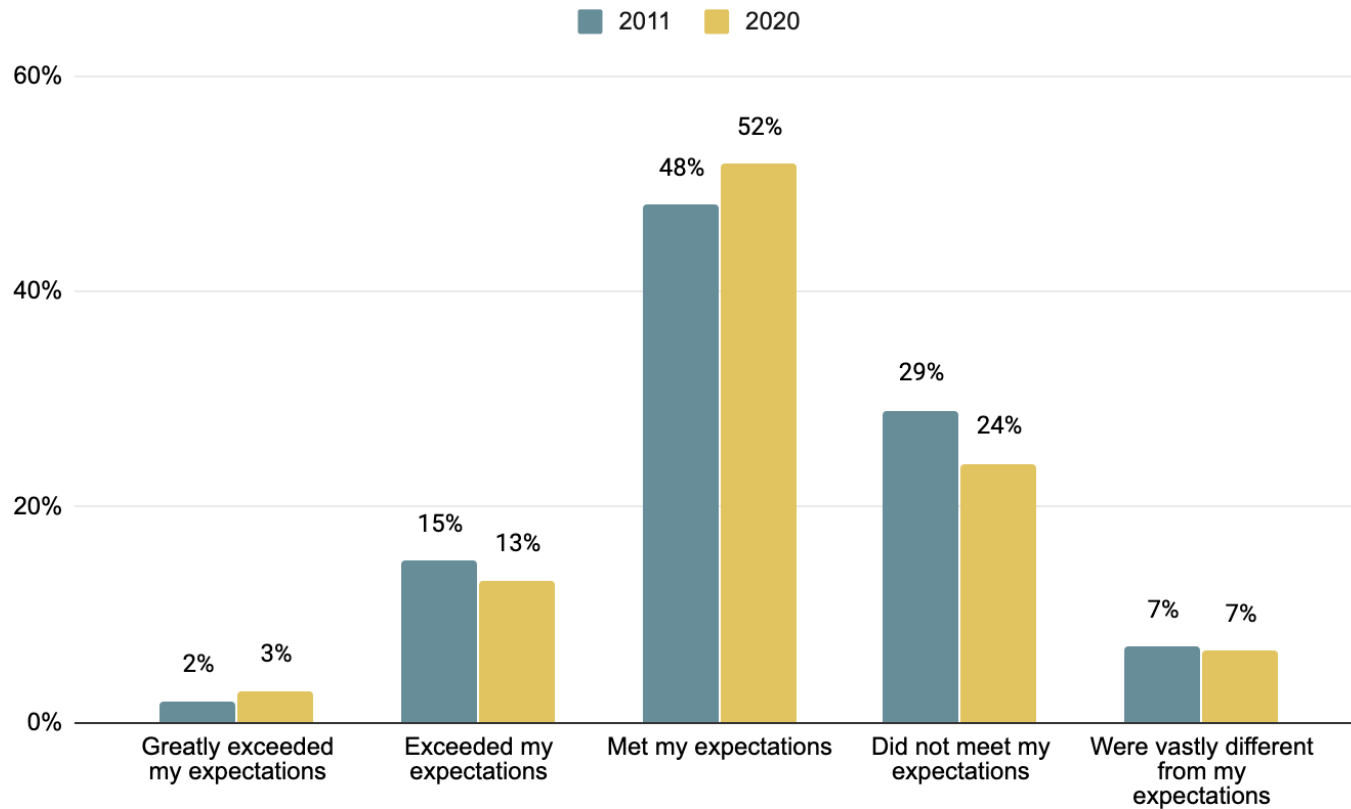
Almost half of survey respondents believe lawyers are more likely to have work-related stress as compared to other highly educated or trained individuals who have responsibility for others' safety, financial, medical, or legal welfare.

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

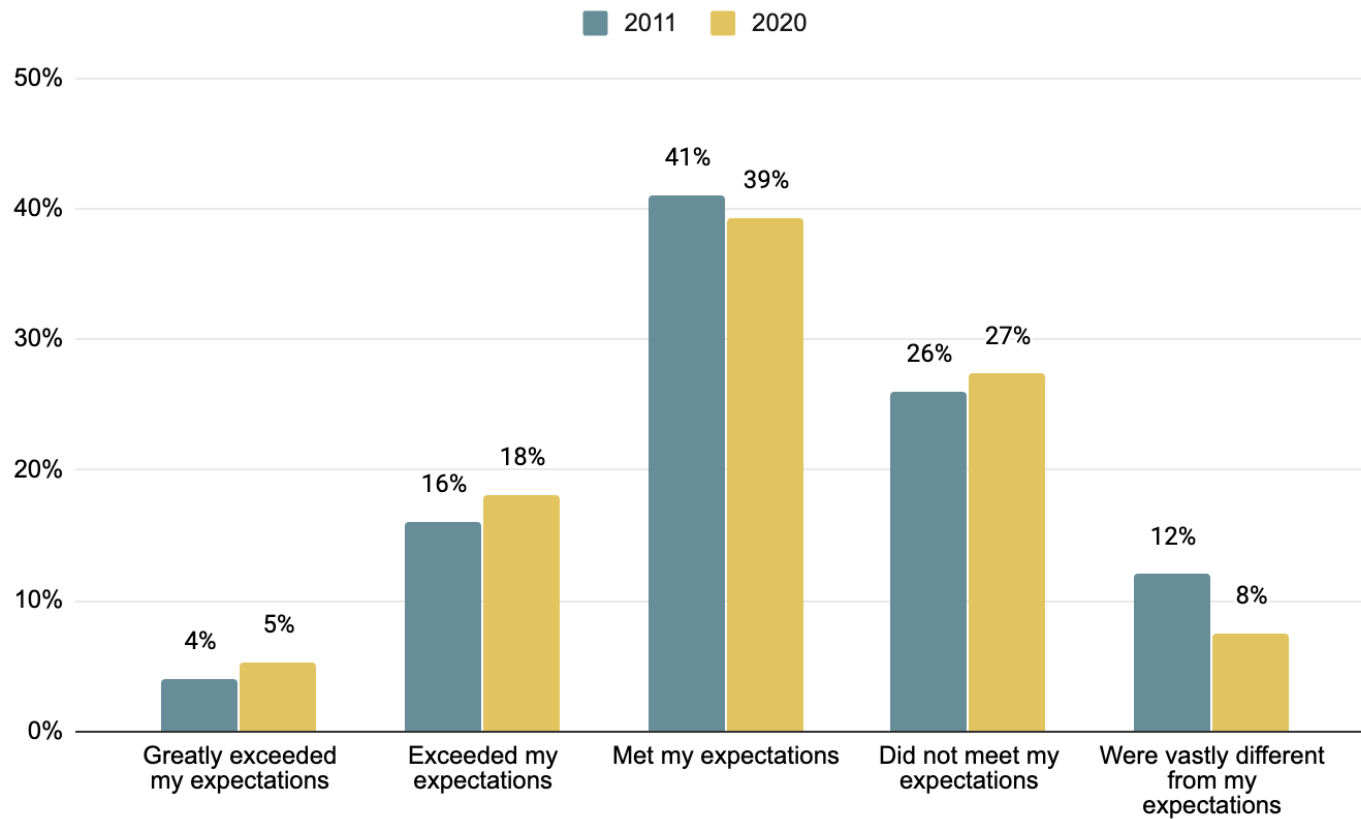
How has your income as a lawyer been when compared to your expectations upon beginning your career?



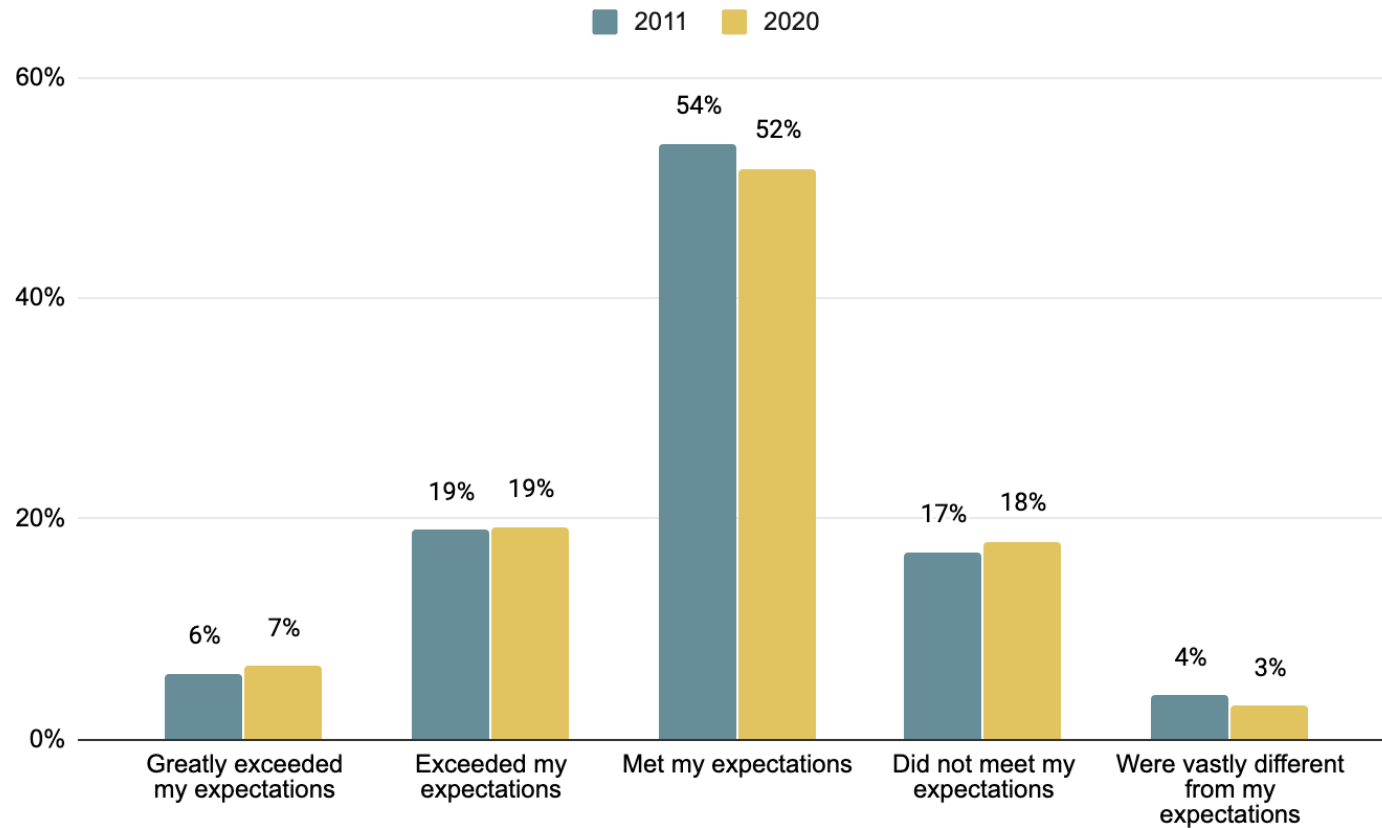
How has your work/life balance as a lawyer been when compared to your expectations upon beginning your career?



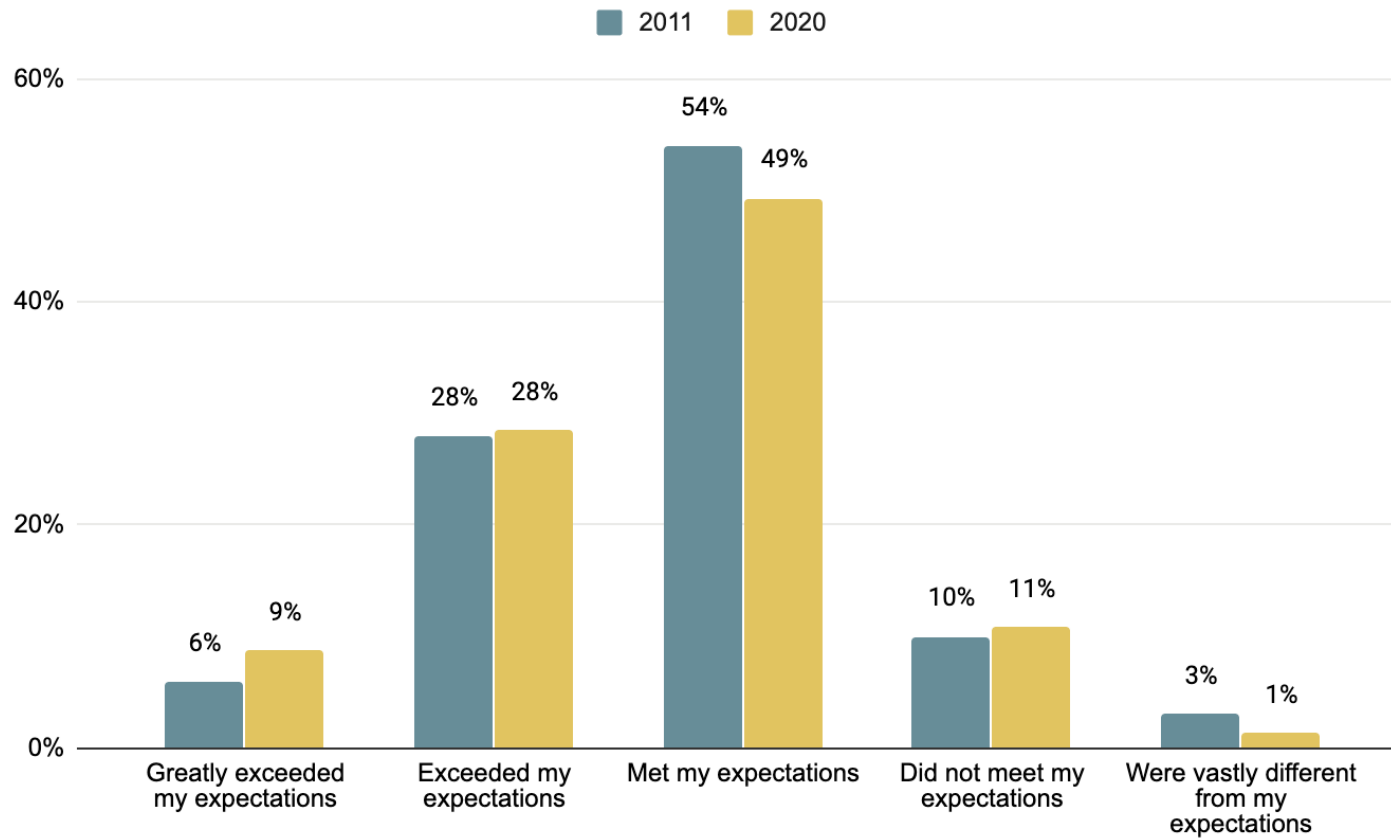
How have the career opportunities as a lawyer been when compared to your expectations upon beginning your career?



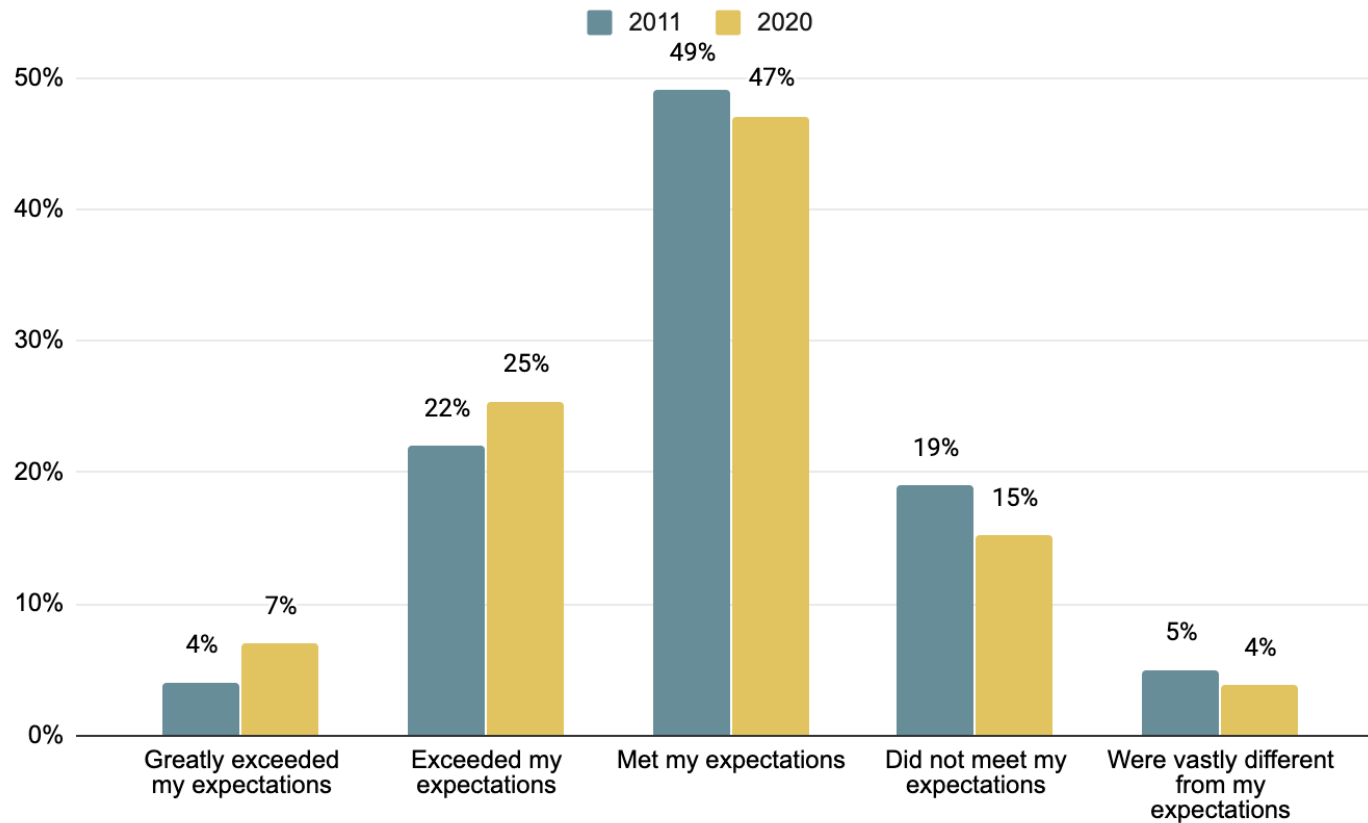
How has helping others / Public Service as a lawyer been when compared to your expectations upon beginning your career?



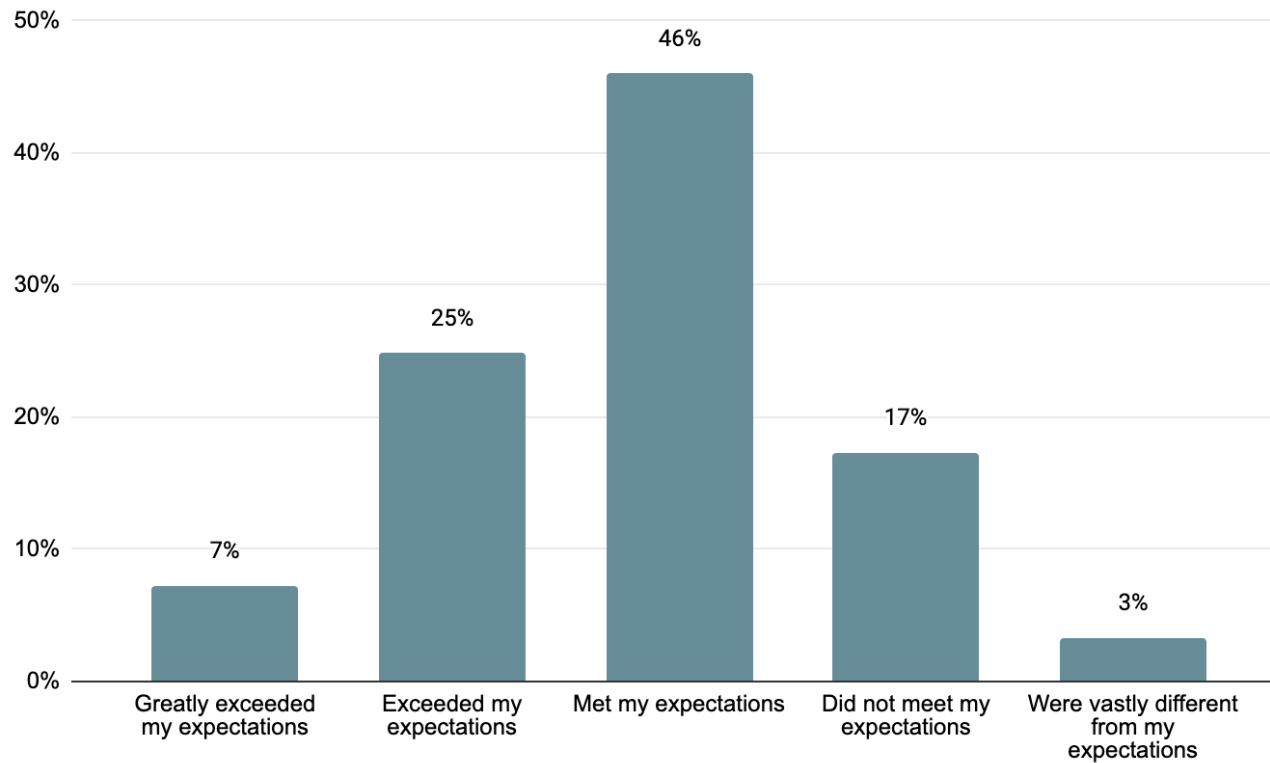
How has the opportunities for learning as a lawyer been when compared to your expectations upon beginning your career?



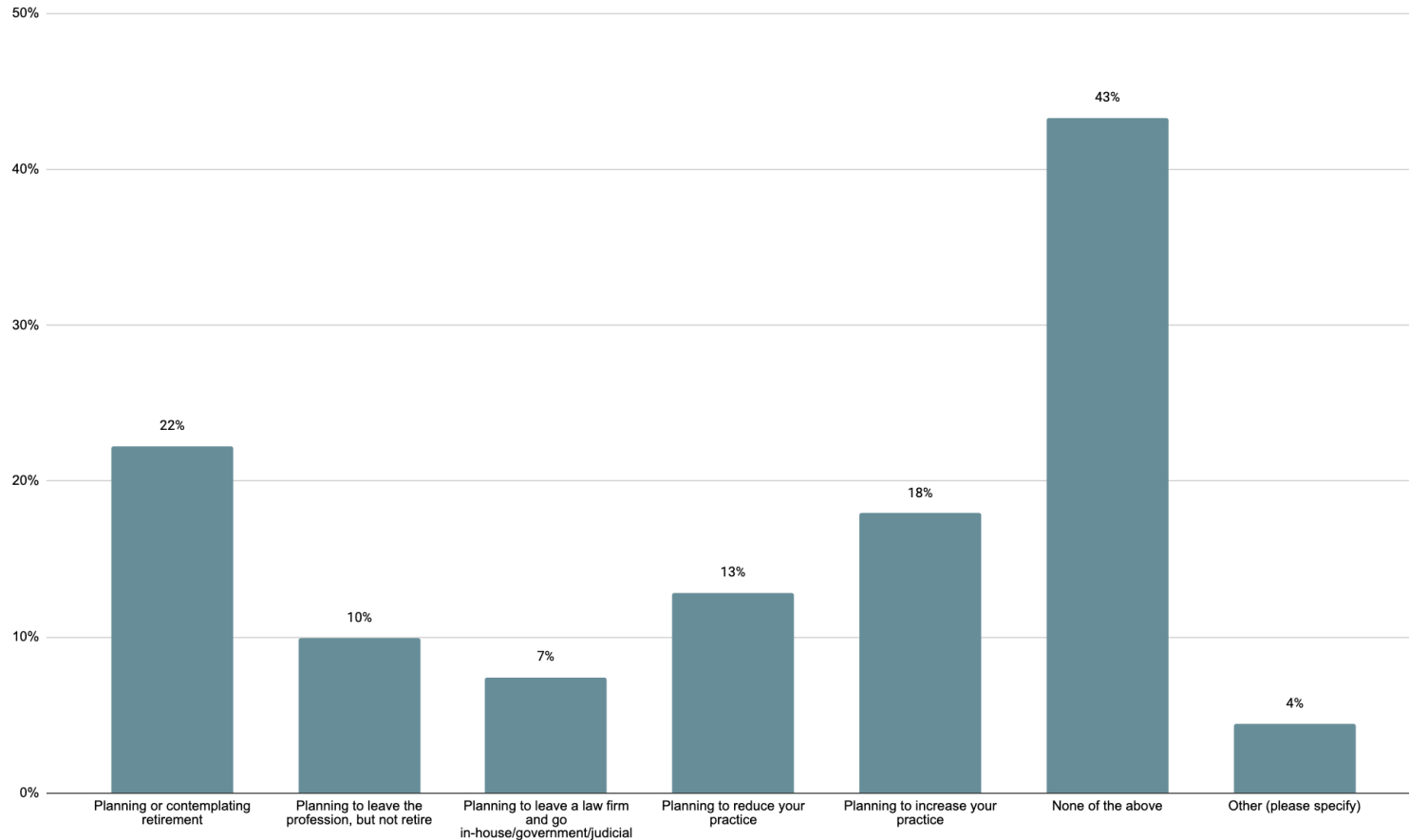
How have your professional relationships as a lawyer been when compared to your expectations upon beginning your career?



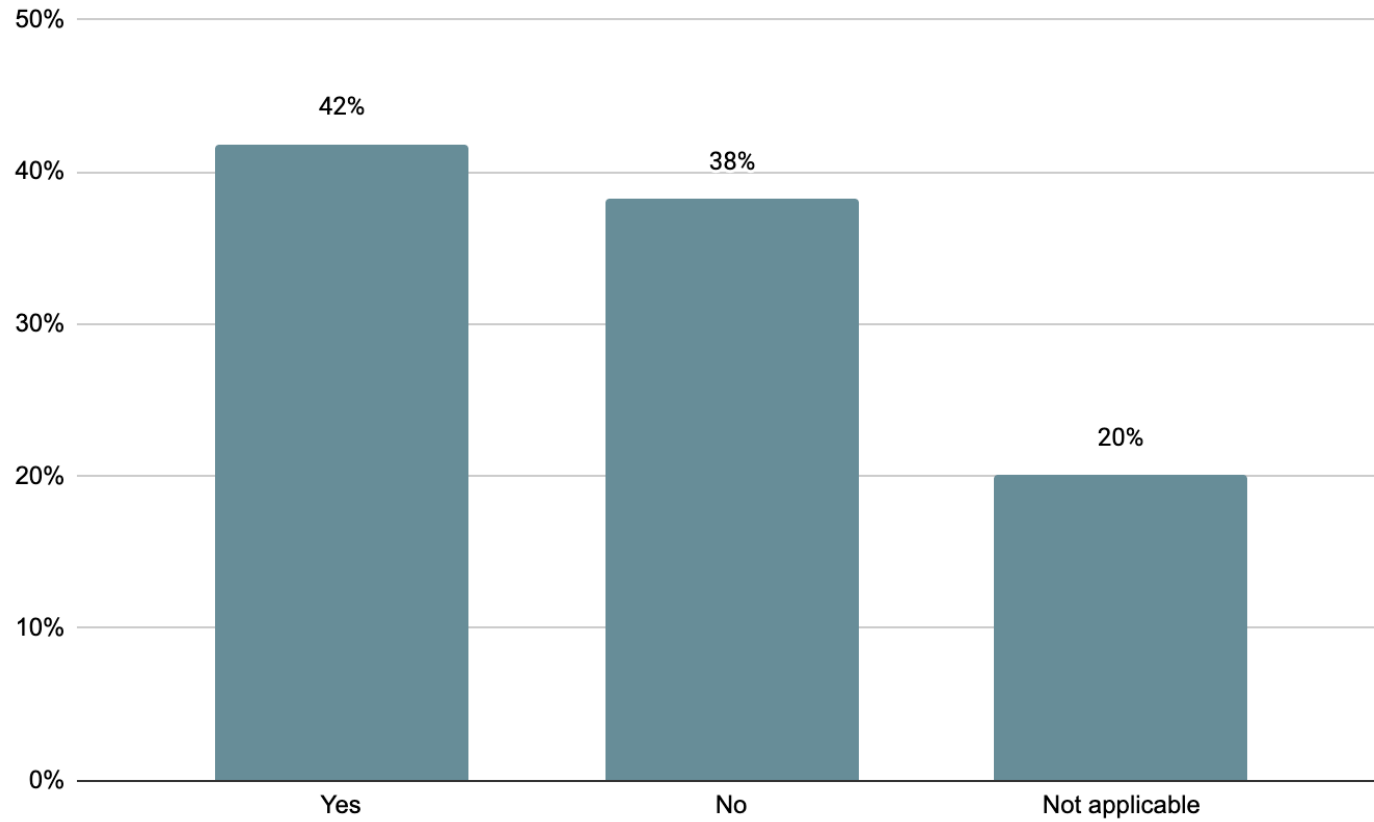
How have your professional relationships as a lawyer been when compared to your expectations upon beginning your career?



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

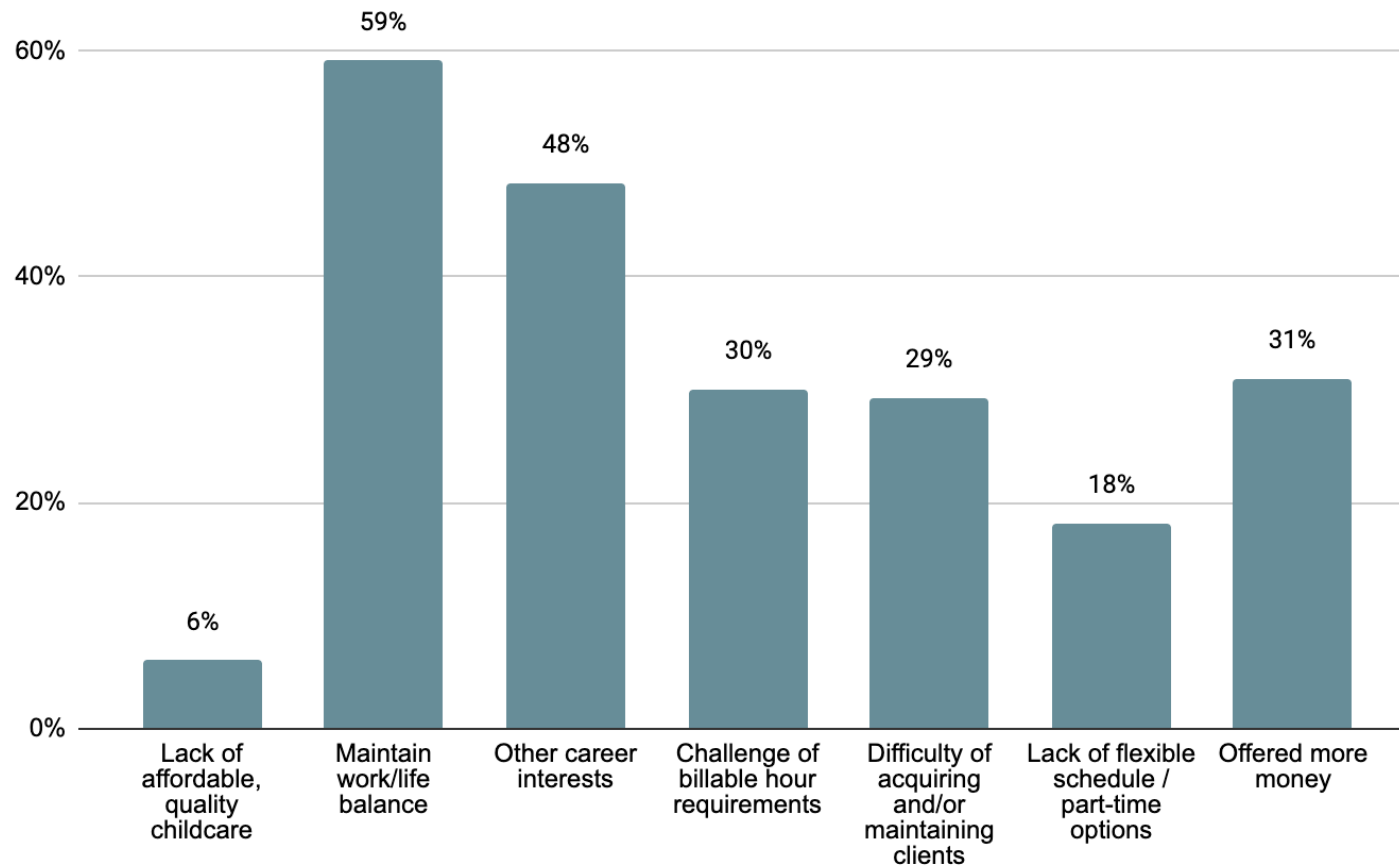


Have you left or considered leaving a law firm in the past five years?

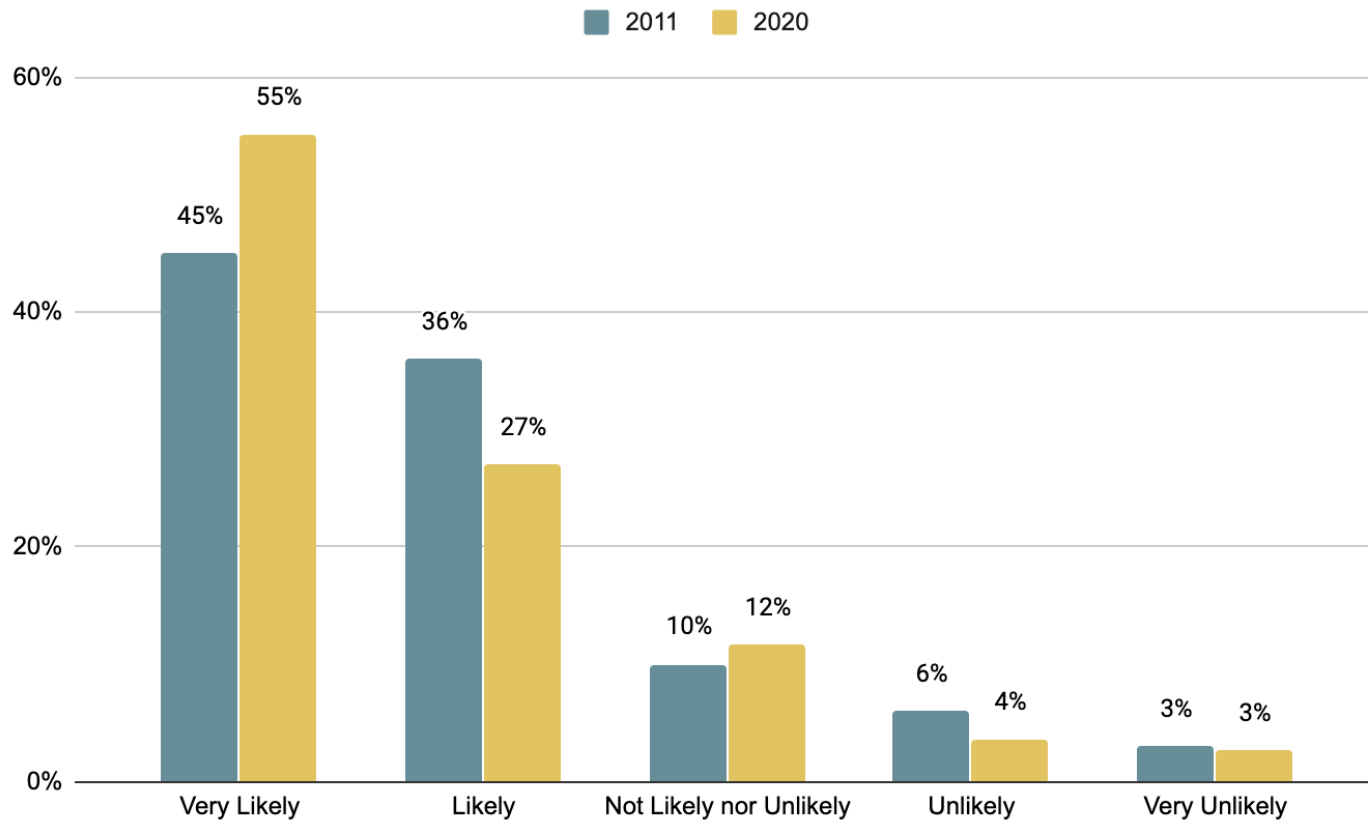


If you have considered a different type of practice, was it due to:

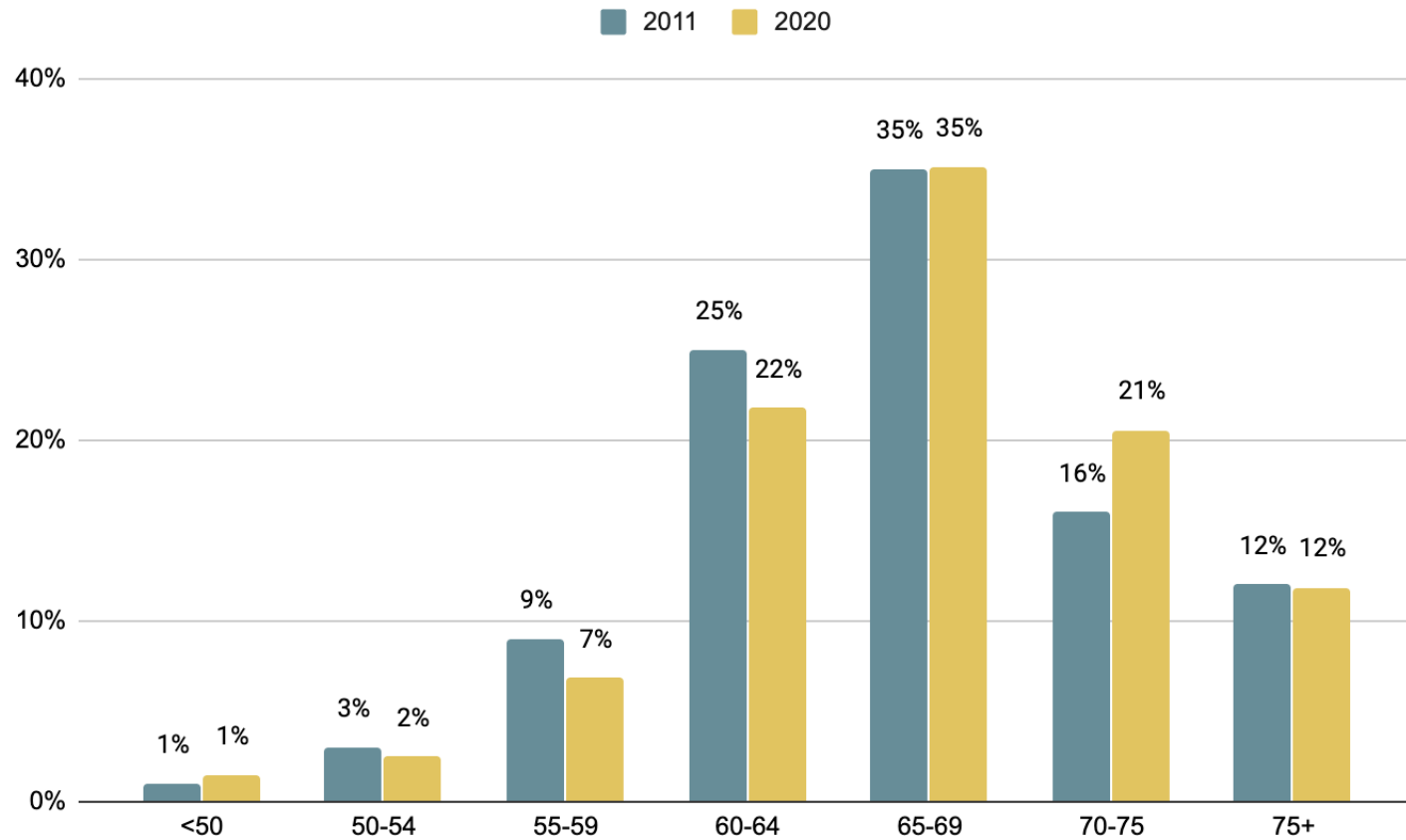
Please select all that apply.



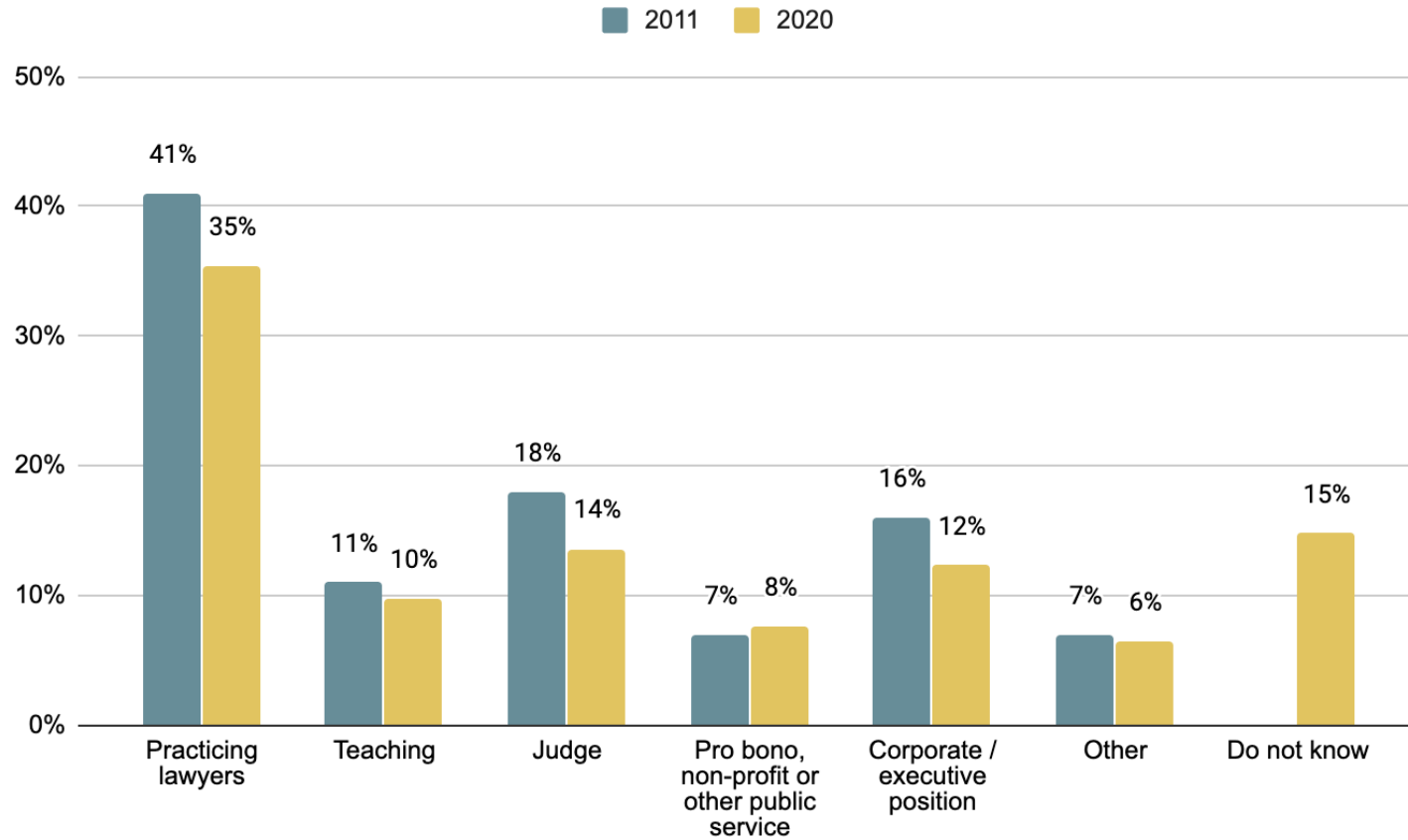
How likely is it that you will stay in the legal profession until your retirement?



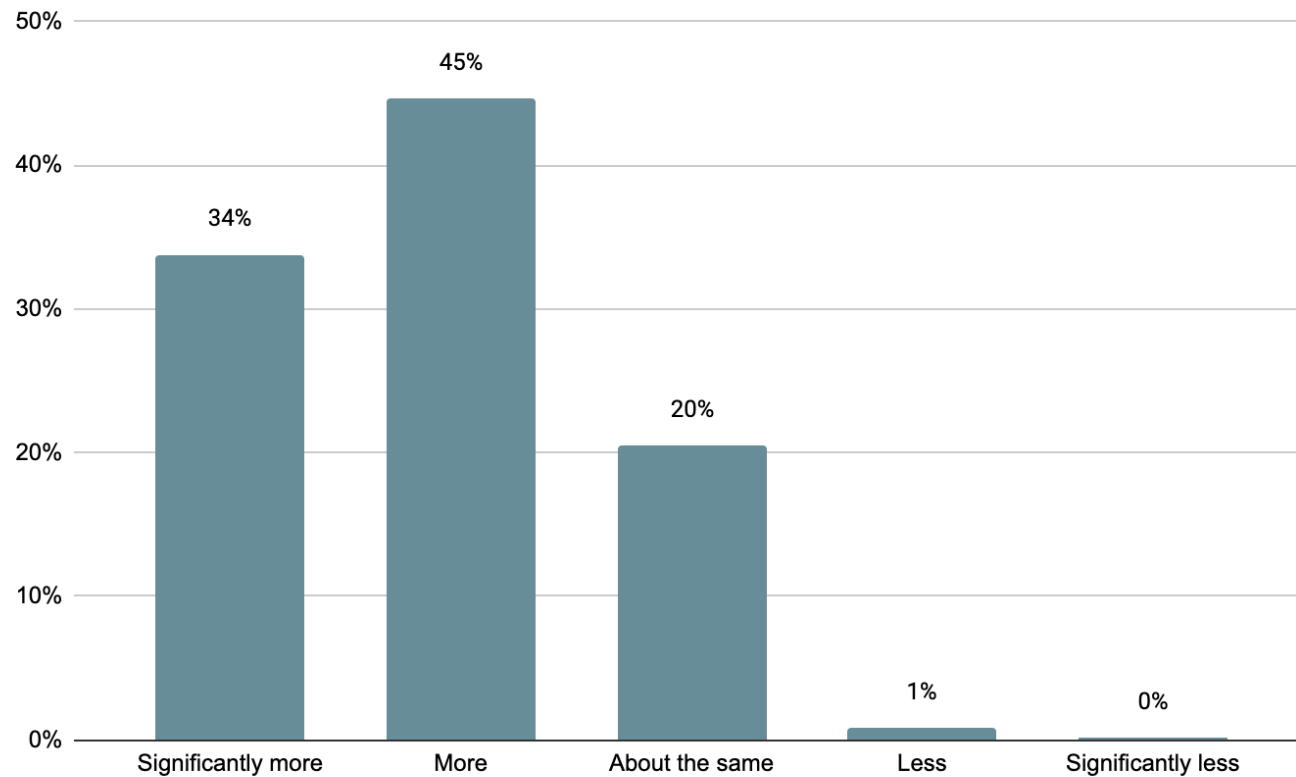
At what age do you plan to retire?



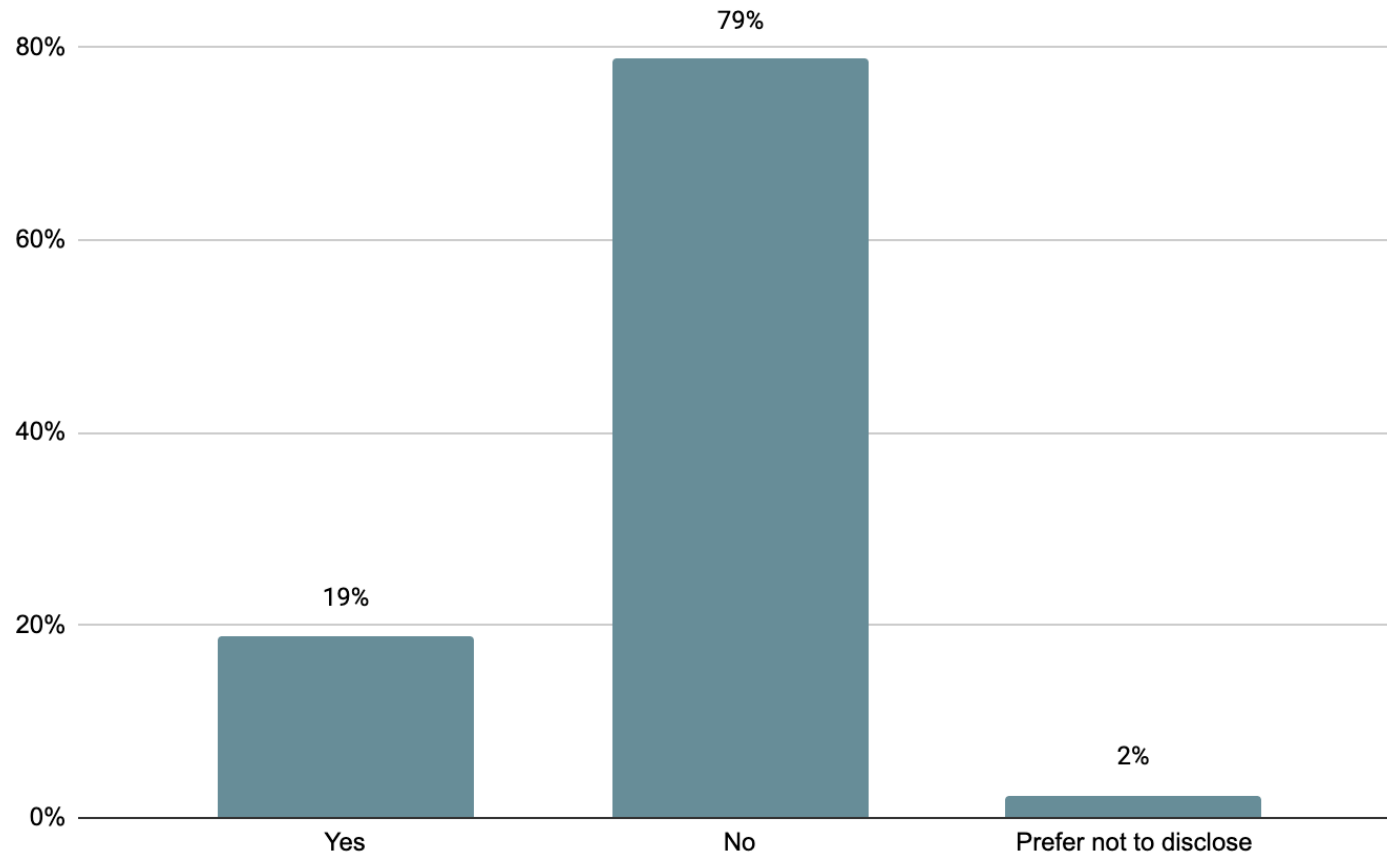
In what role would you choose to end your career?



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

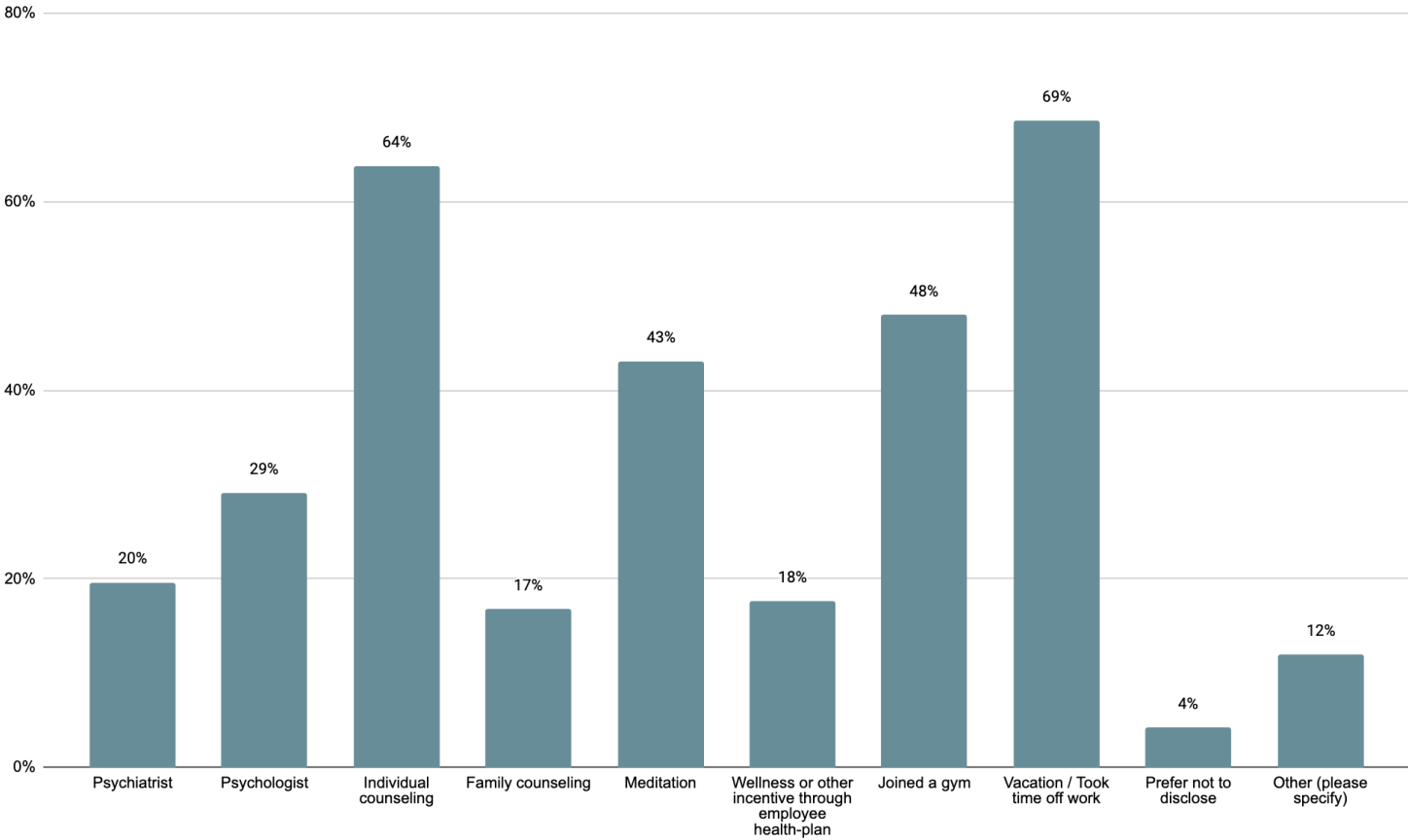


In the past two years have you sought out services for work-related stress?



What type of services have you tried?

Please select all the apply.



Utah State Bar



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

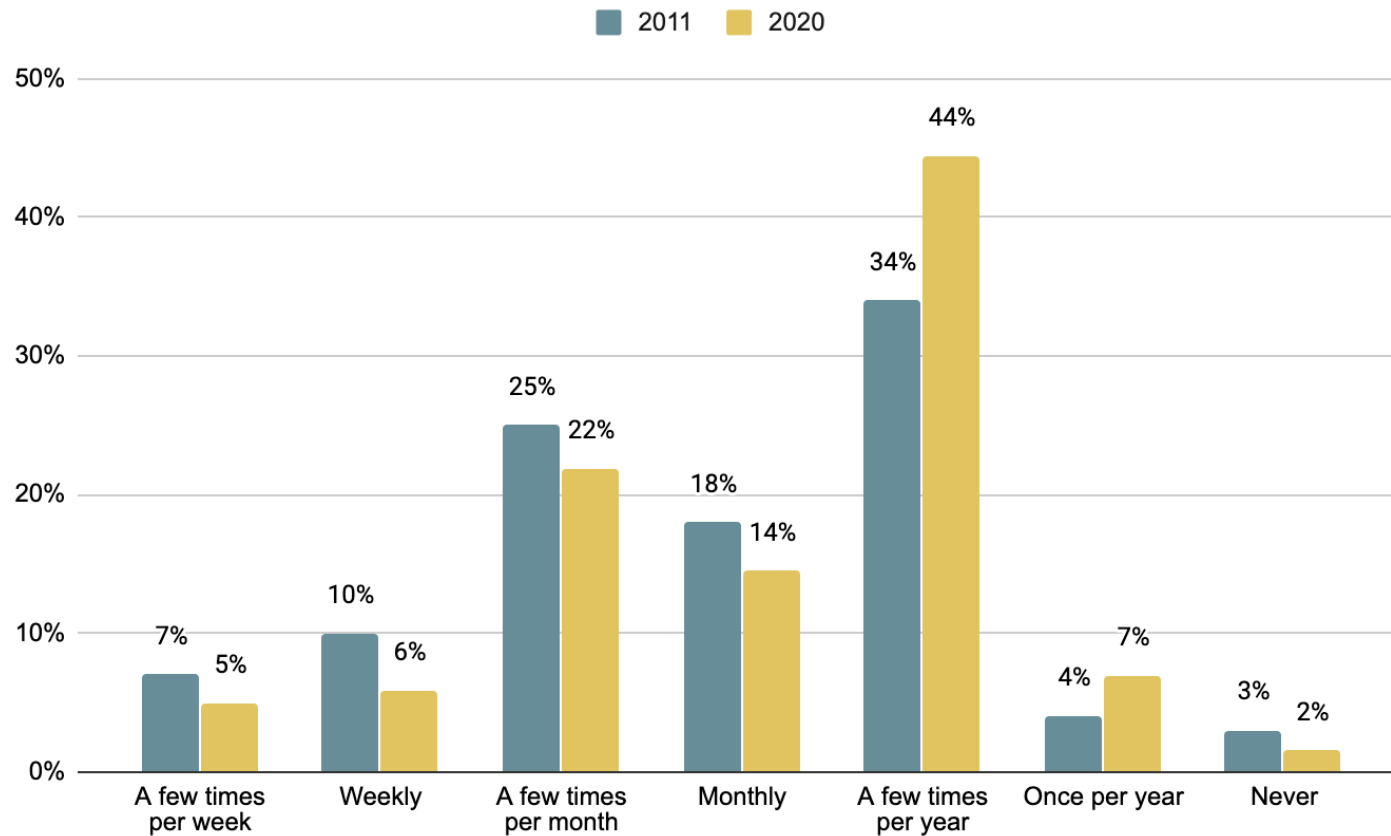
52% of survey respondents read the Utah Bar Journal each month.



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

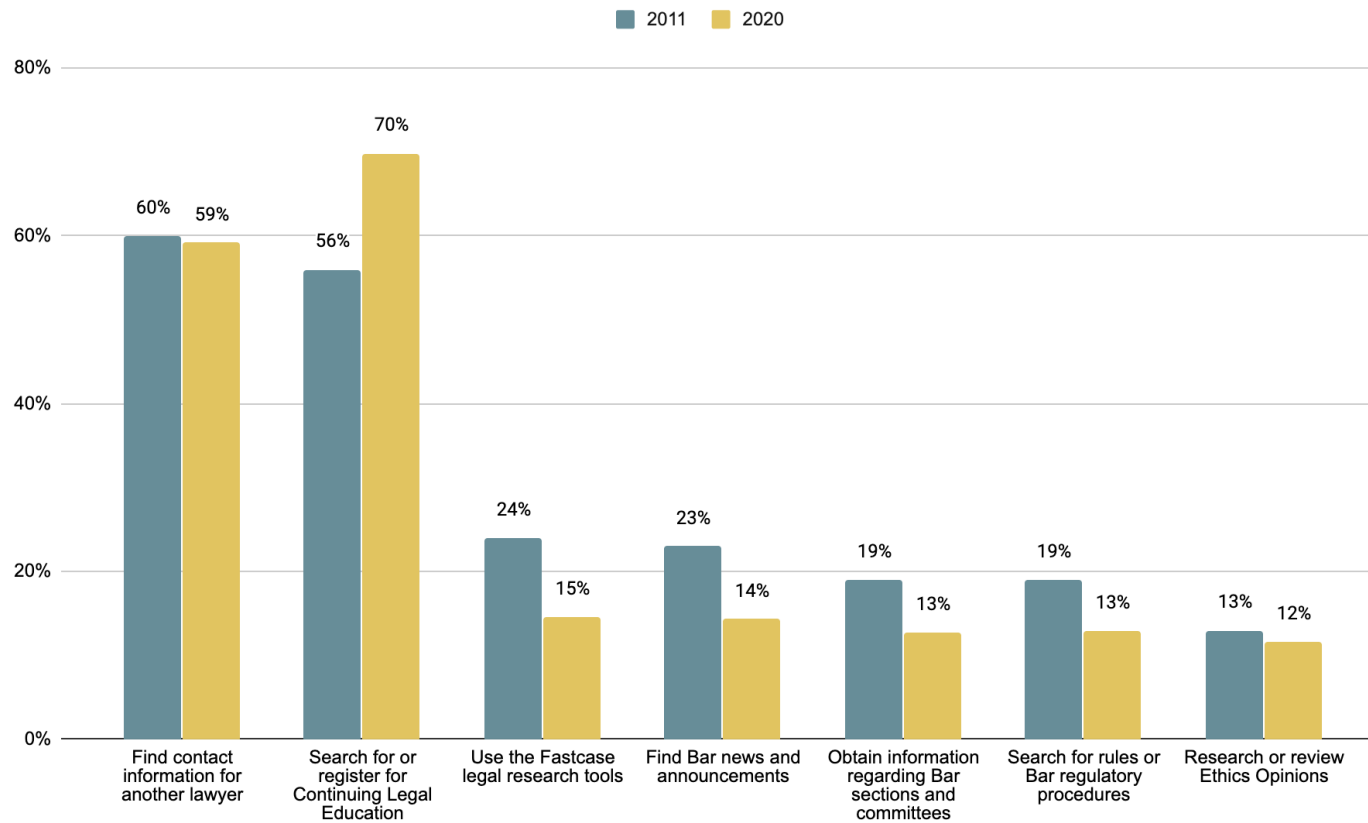
Only 4% receive the Utah Bar Journal digitally.

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



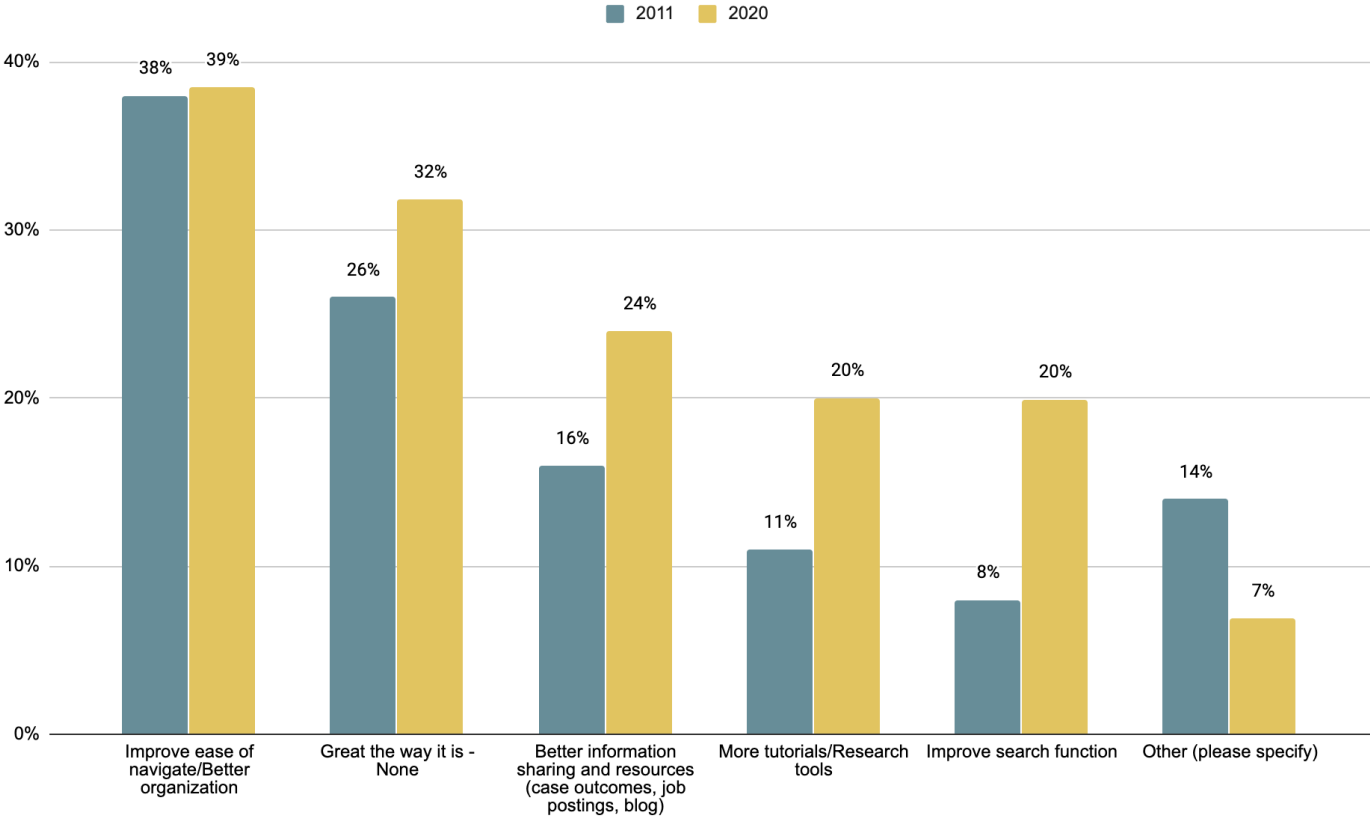
What are the primary reasons you visit the Bar's website (UtahBar.org)?

Please select all that apply.

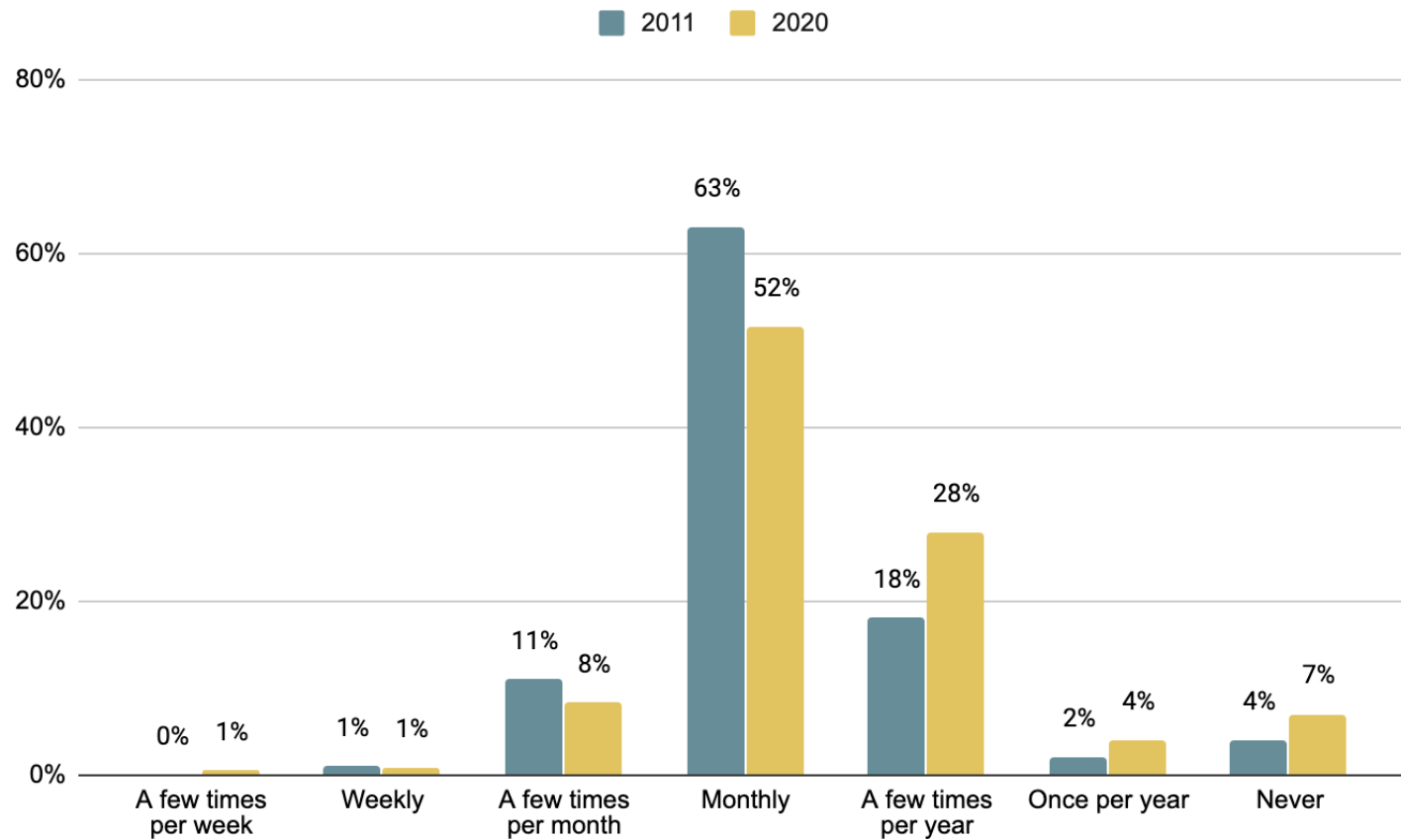


What improvements or services would you like to see added to the Bar's website?

Please select all that apply.

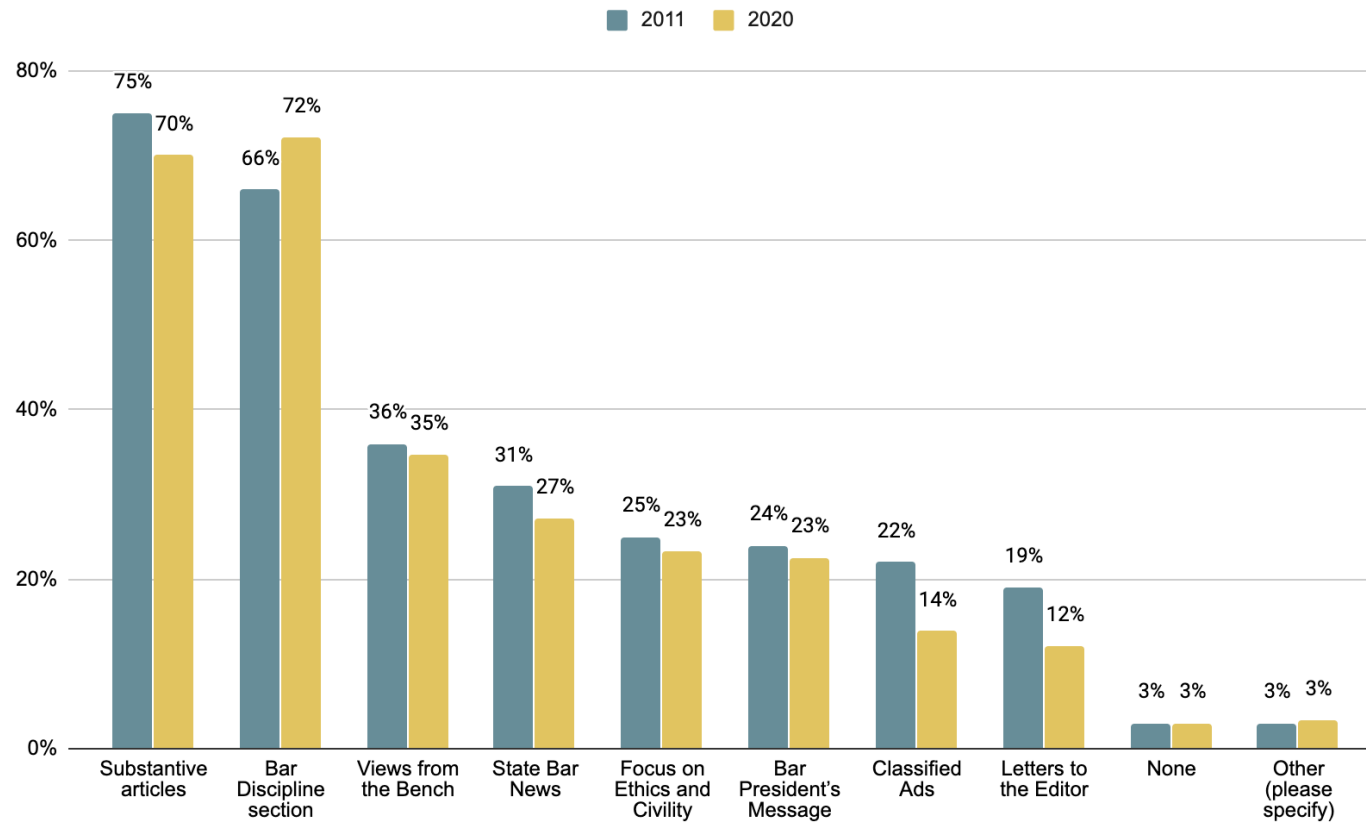


Which of the following best describes how often you read at least a portion of the Utah Bar Journal?



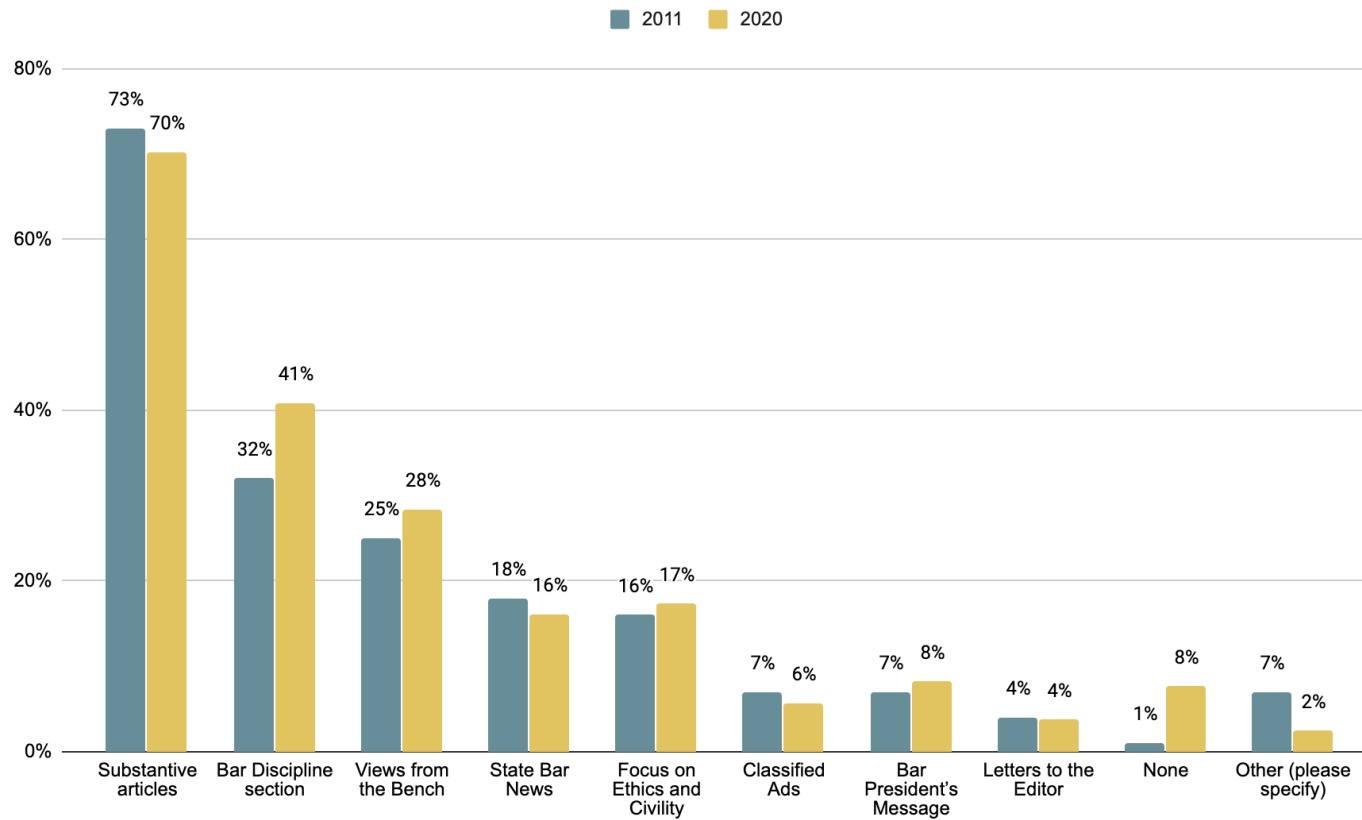
What sections of the Utah Bar Journal do you read most often?

Please select all that apply.

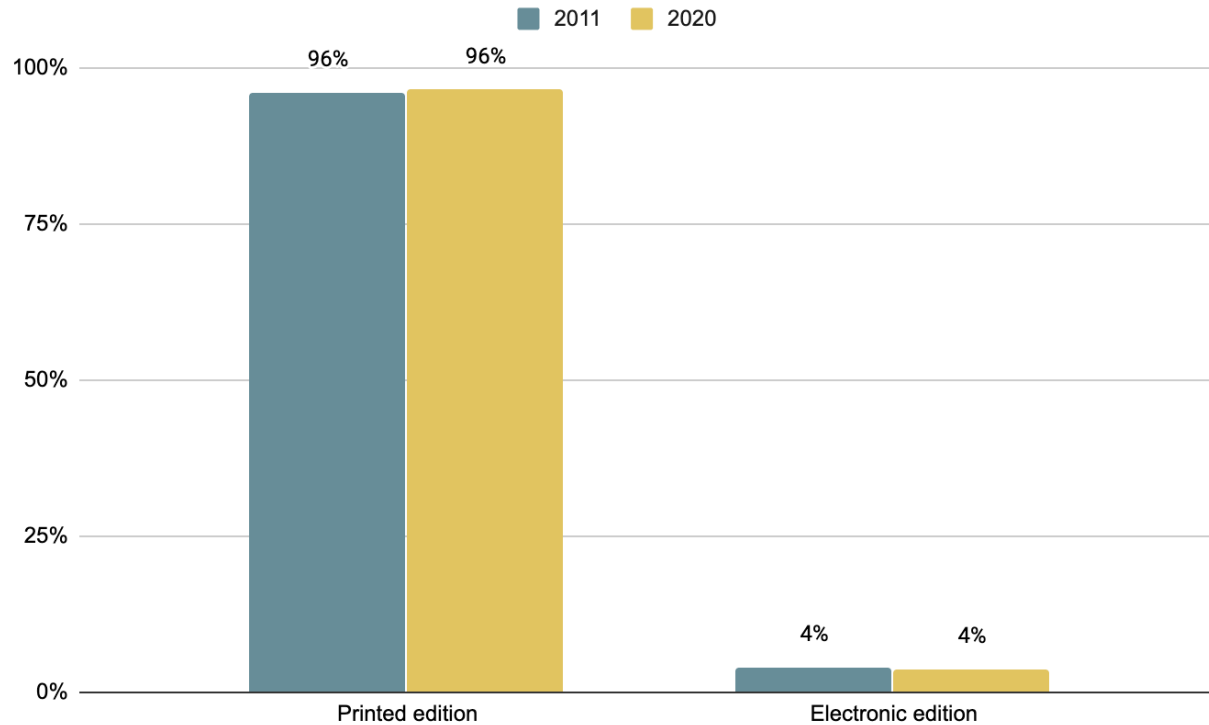


What sections of the Bar Journal do you find most useful?

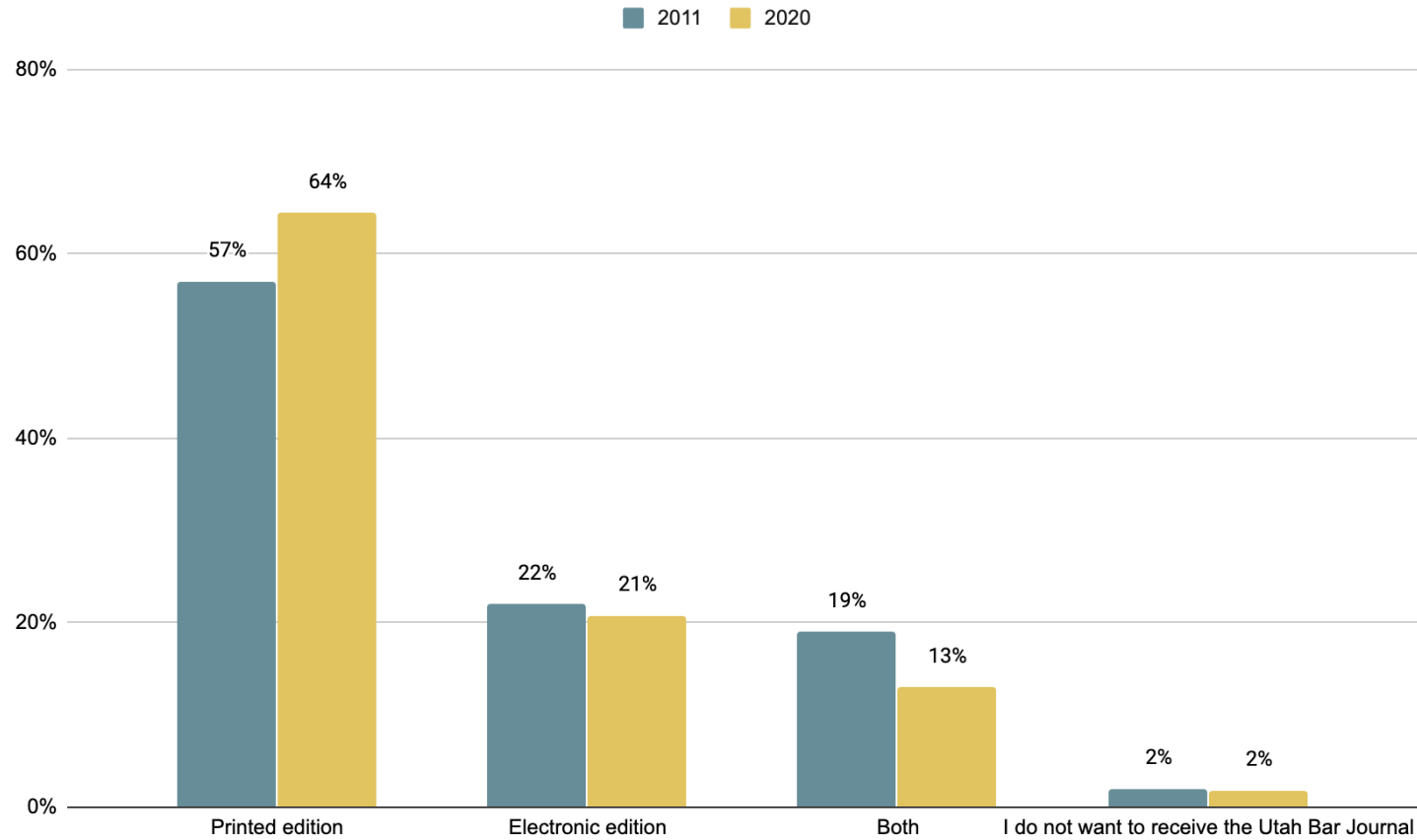
Please select all that apply.



How do you most often read the Utah Bar Journal?

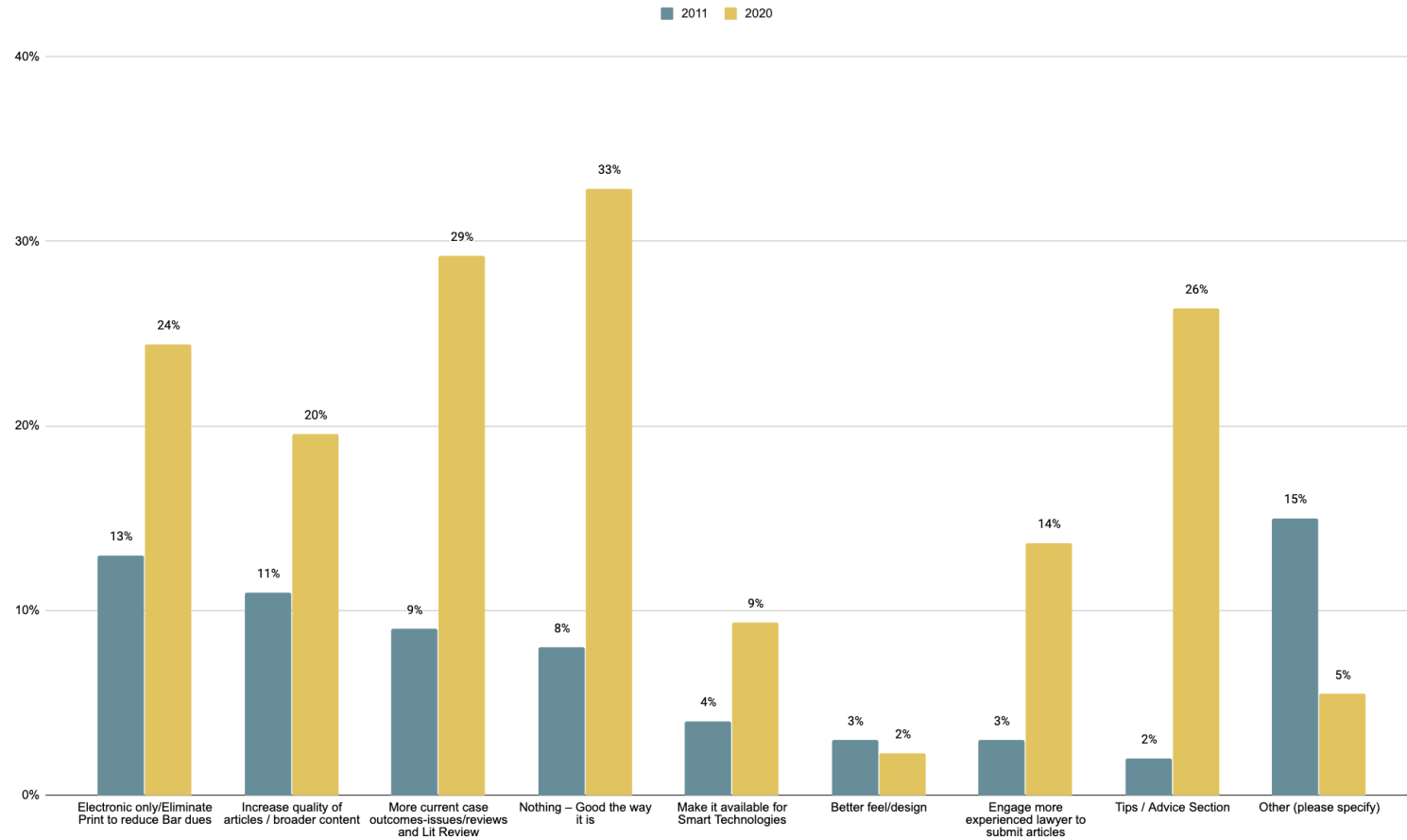


How would you prefer to receive the Utah Bar Journal?

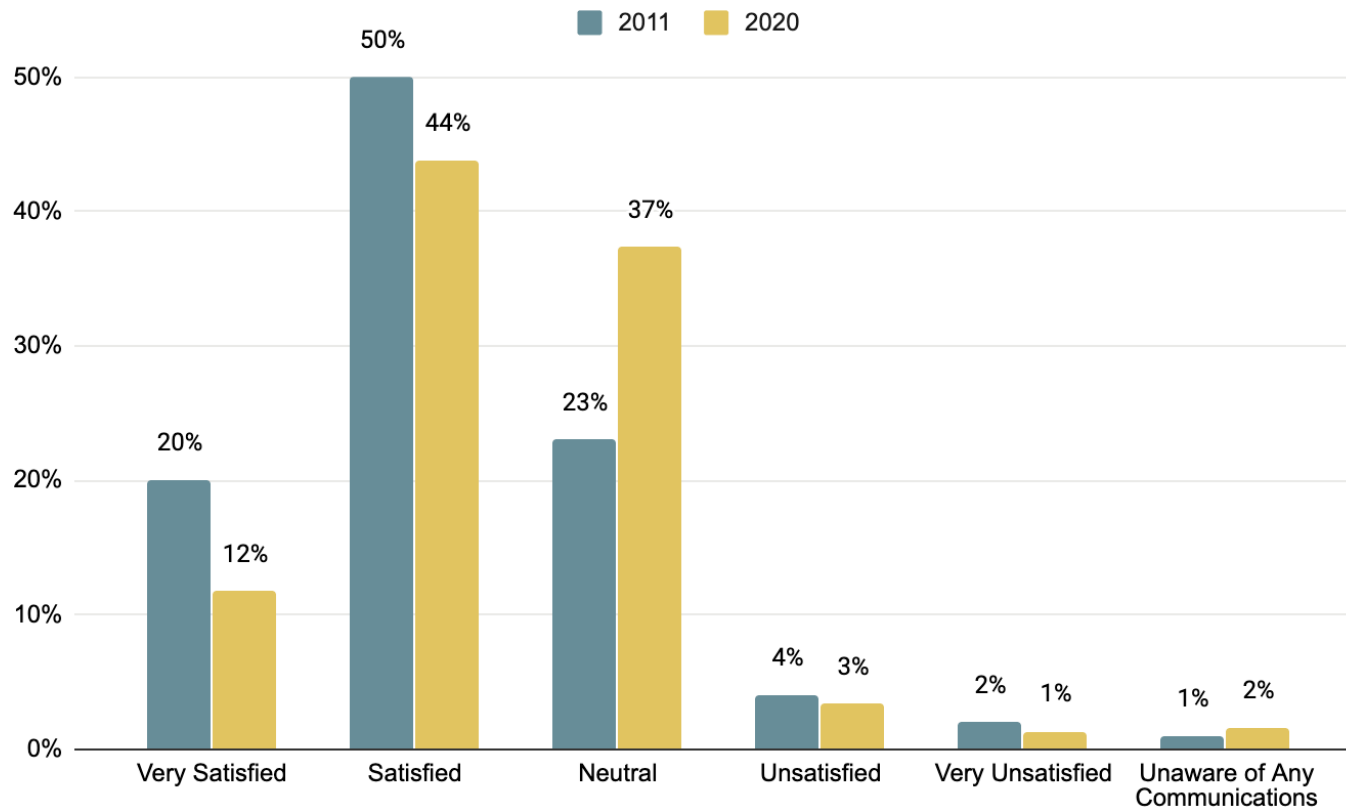


Is there anything you would like to see added or changed with respect to the Utah Bar Journal?

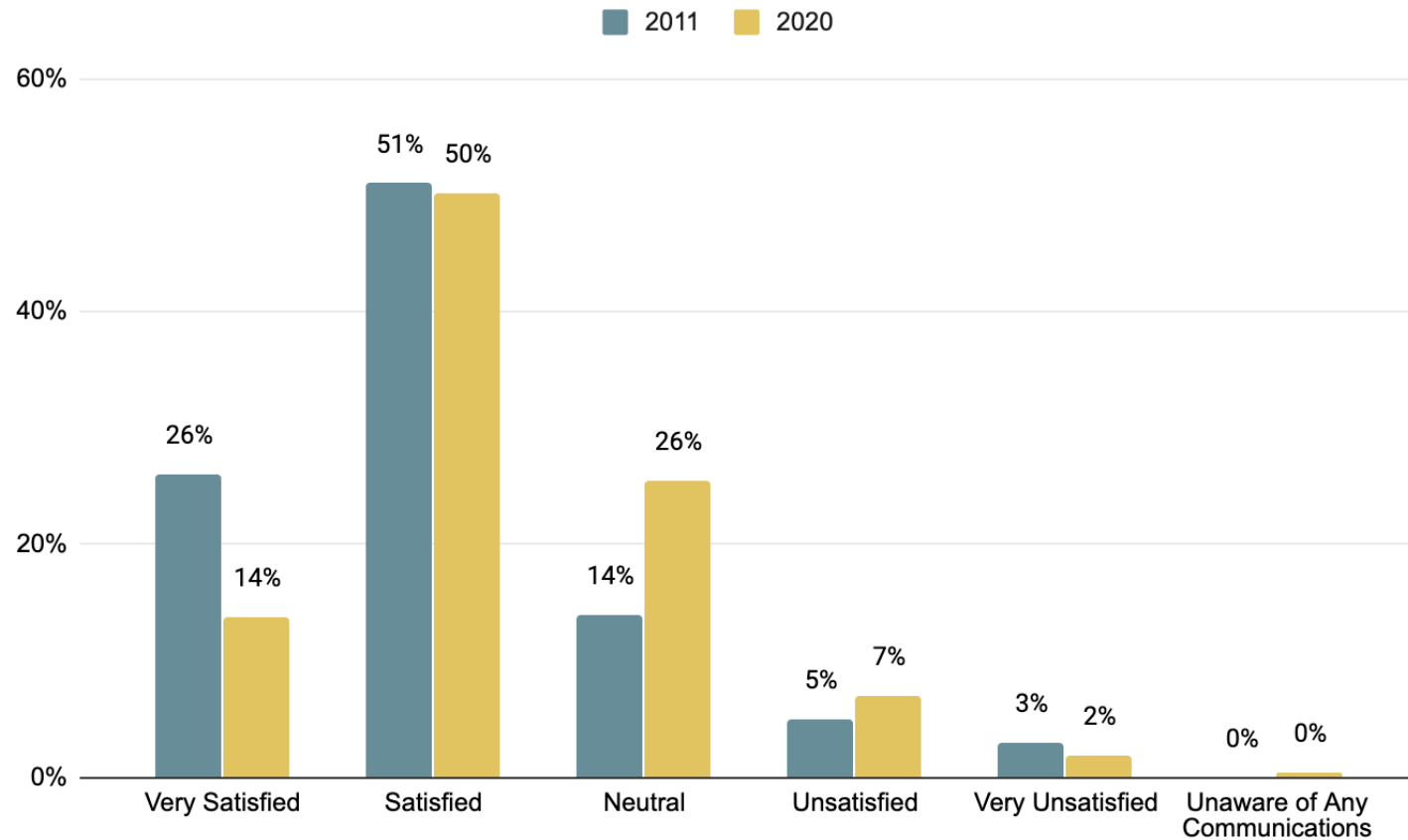
Please select all that apply.



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

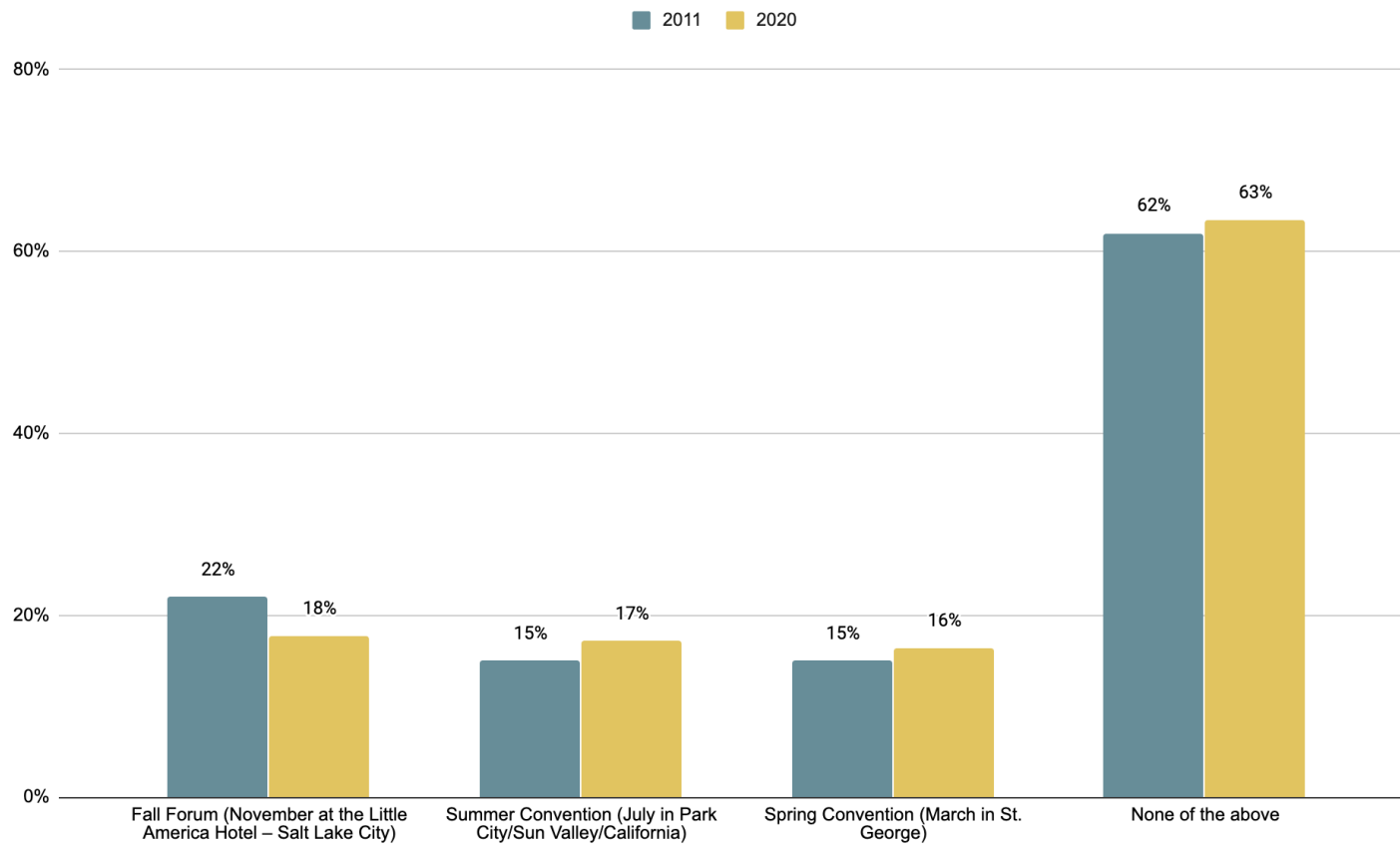


Please rate your satisfaction with the Bar's communications to its members concerning continuing legal education.



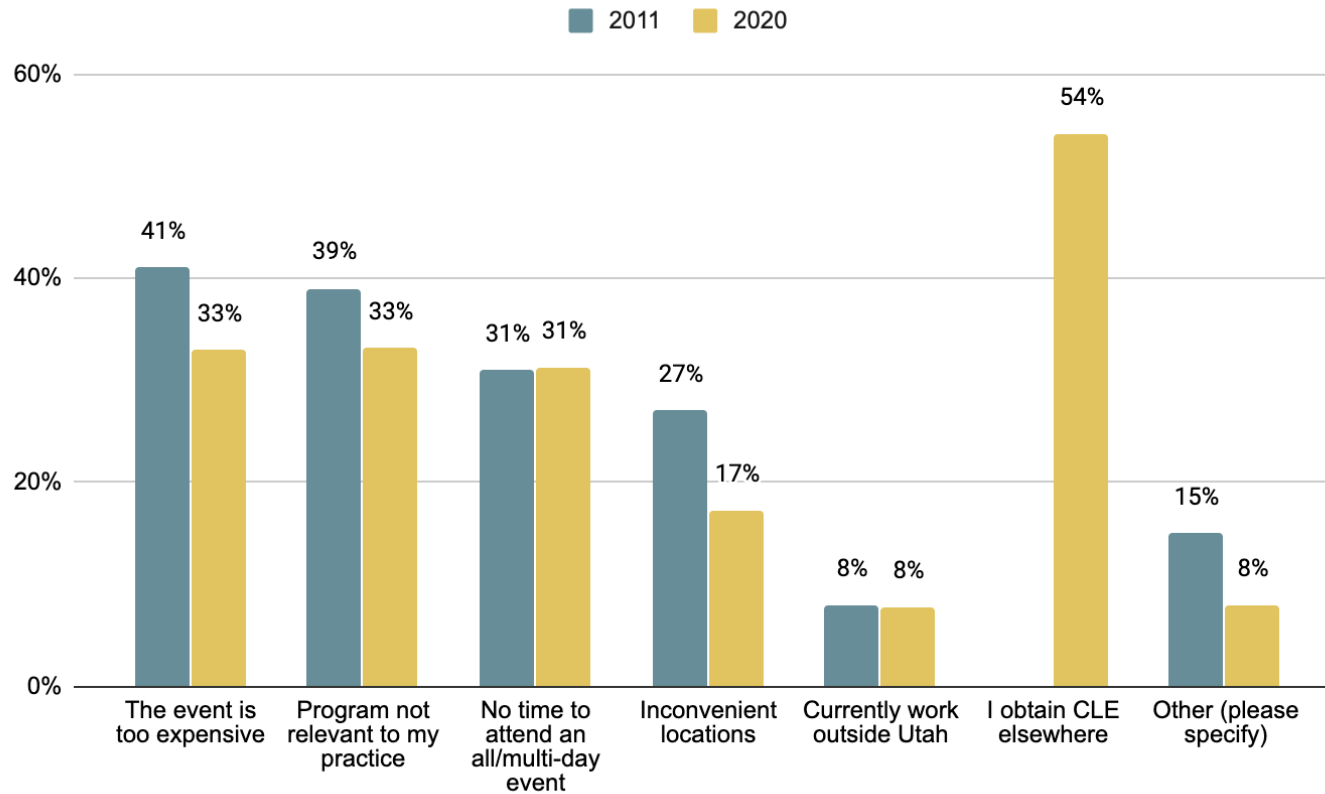
Which of the following Utah State Bar events do you attend when you are able?

Please select all that apply.



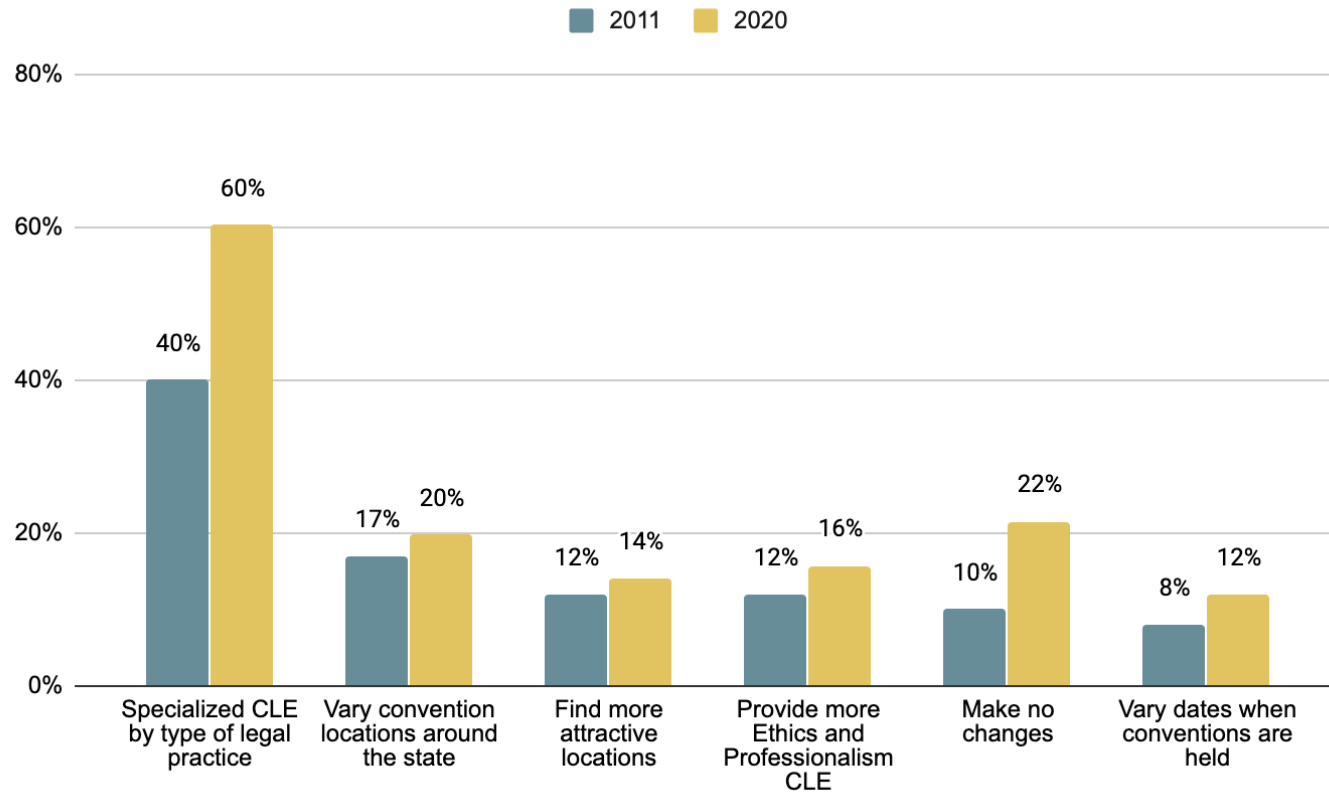
If you do not attend the Summer Convention in July, Fall Forum in November, or Spring Convention in March, please select the reasons:

Please select all that apply.



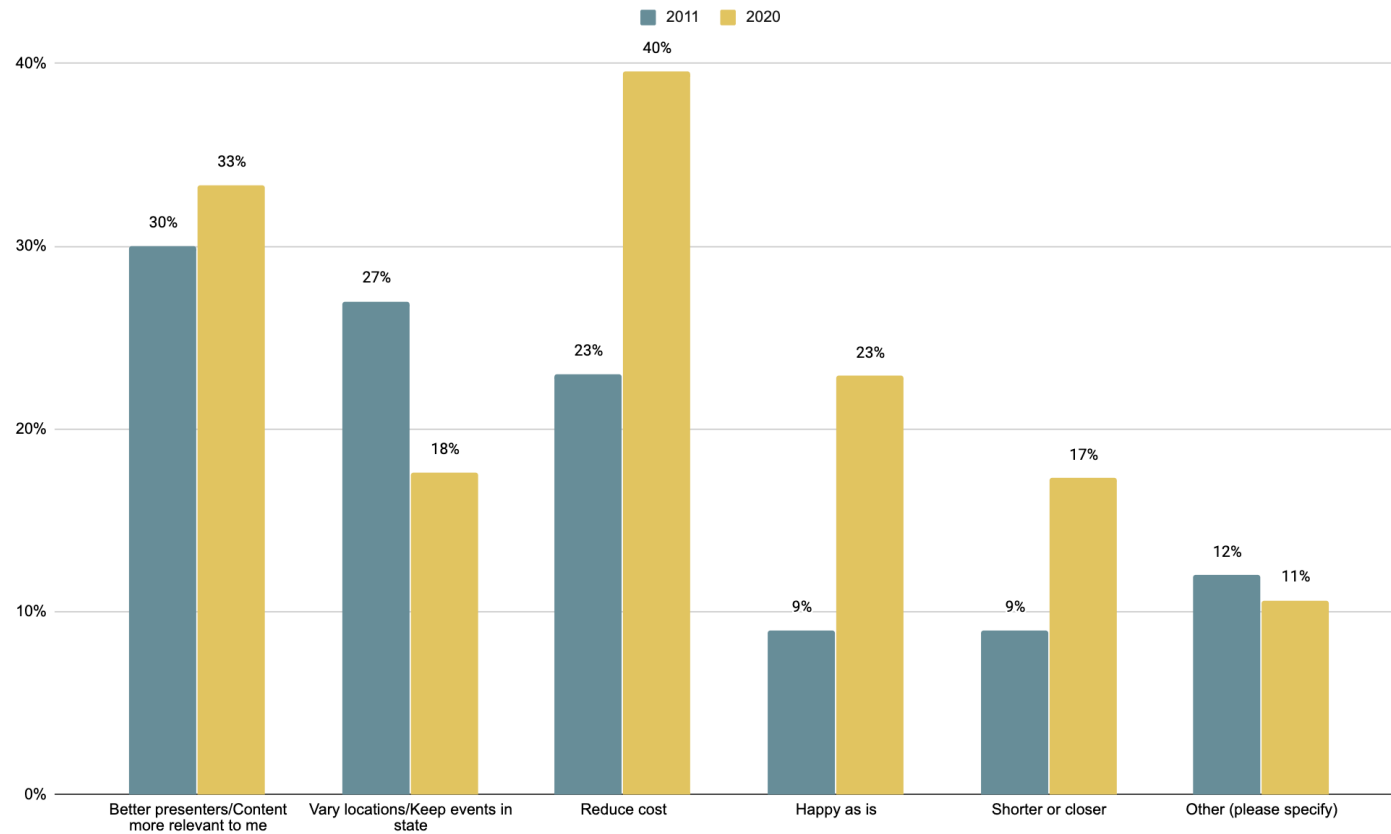
Which of the following would increase the likelihood that you will attend one or more of the above-mentioned major Utah Bar events in the next year?

Please select all that apply.

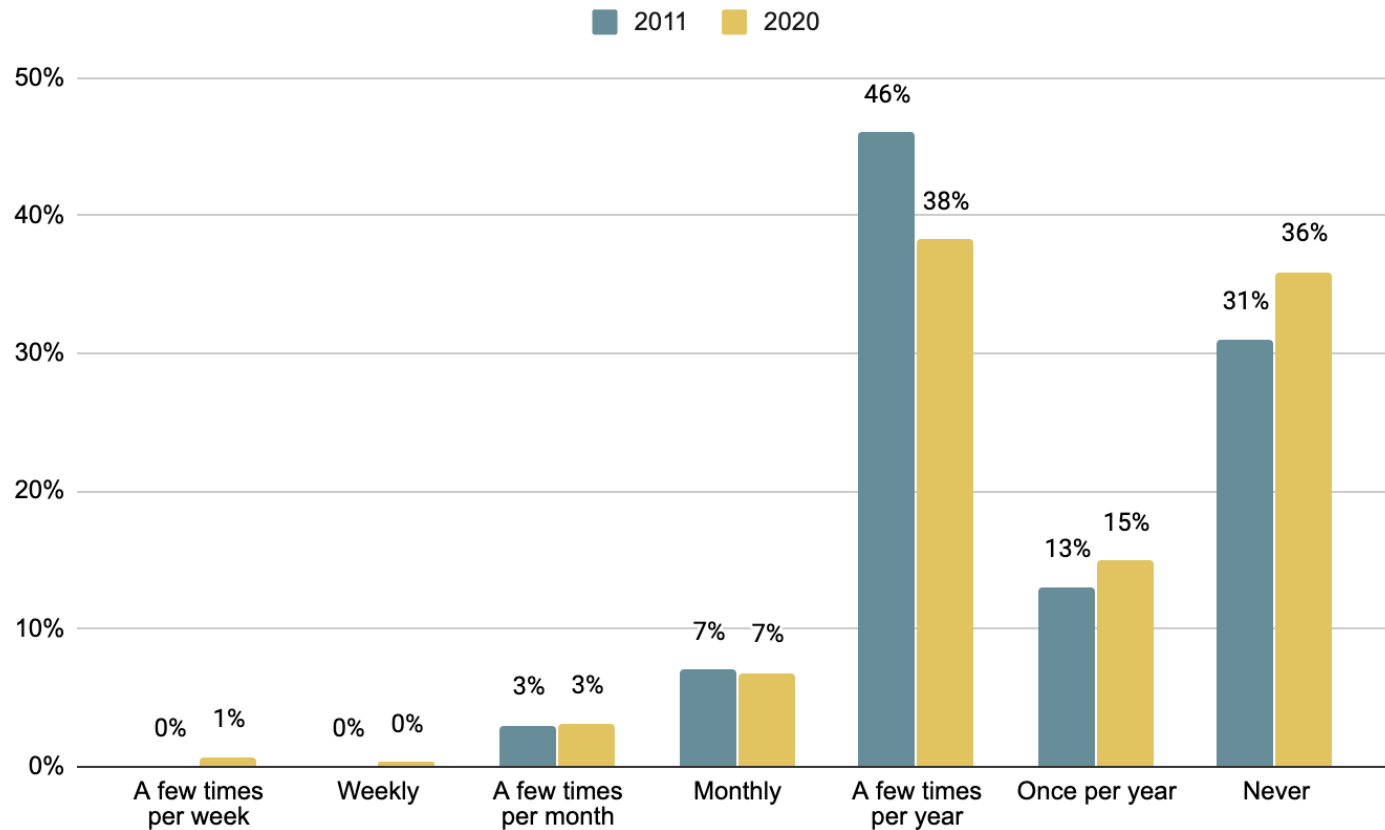


Share any suggestions for changes or improvements to the Summer Convention, Spring Convention or Fall Forum?

Please select all that apply.

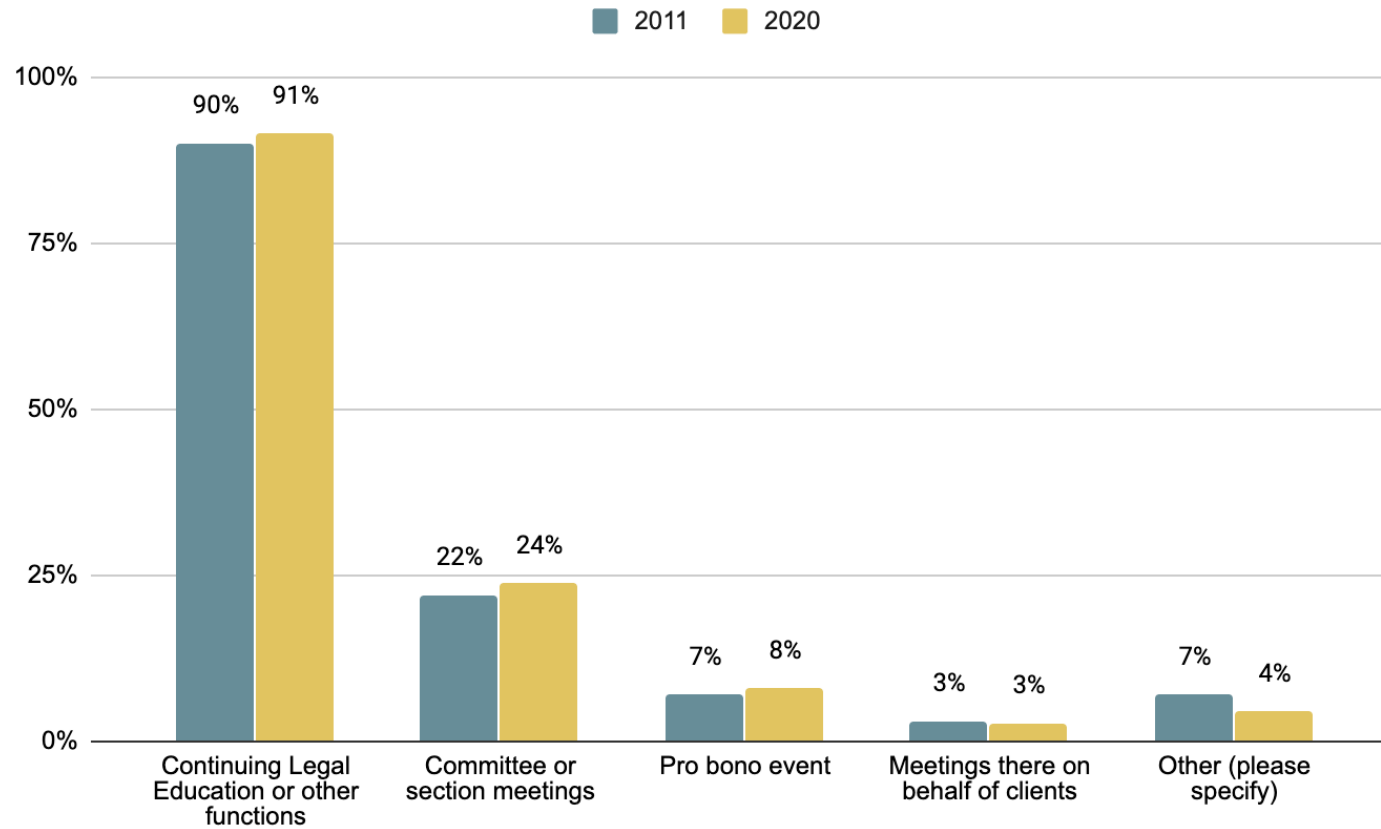


Which of the following best describes how often you have visited and/or used the Utah Law and Justice Center in the last year?



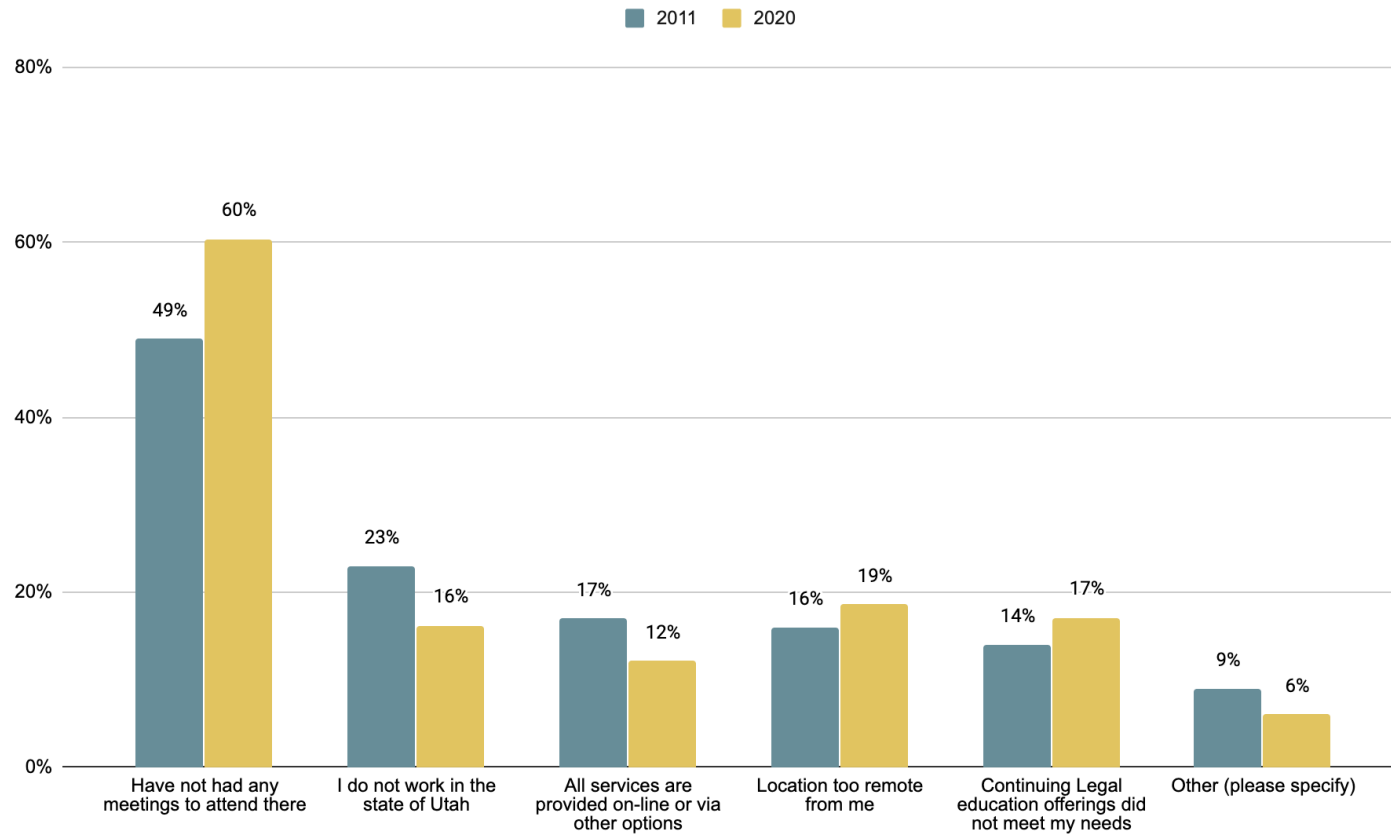
What are the primary reasons you have visited or used the Utah Law and Justice Center in the past year?

Please select all that apply.



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


Please select all that apply.



Diversity and Inclusion

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

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

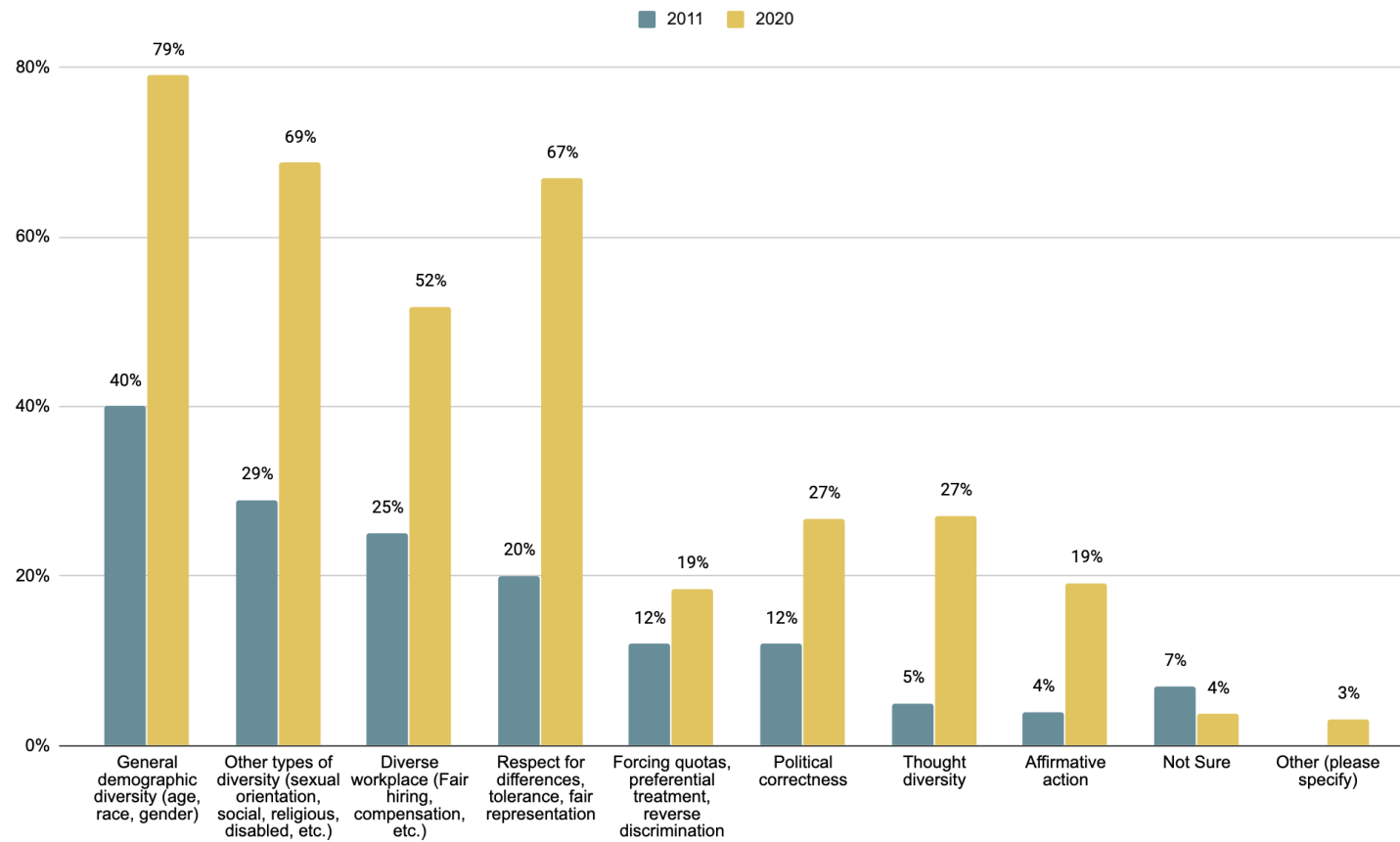


Almost half of survey respondents have attended a CLE or other event about diversity/inclusion in the last two years.

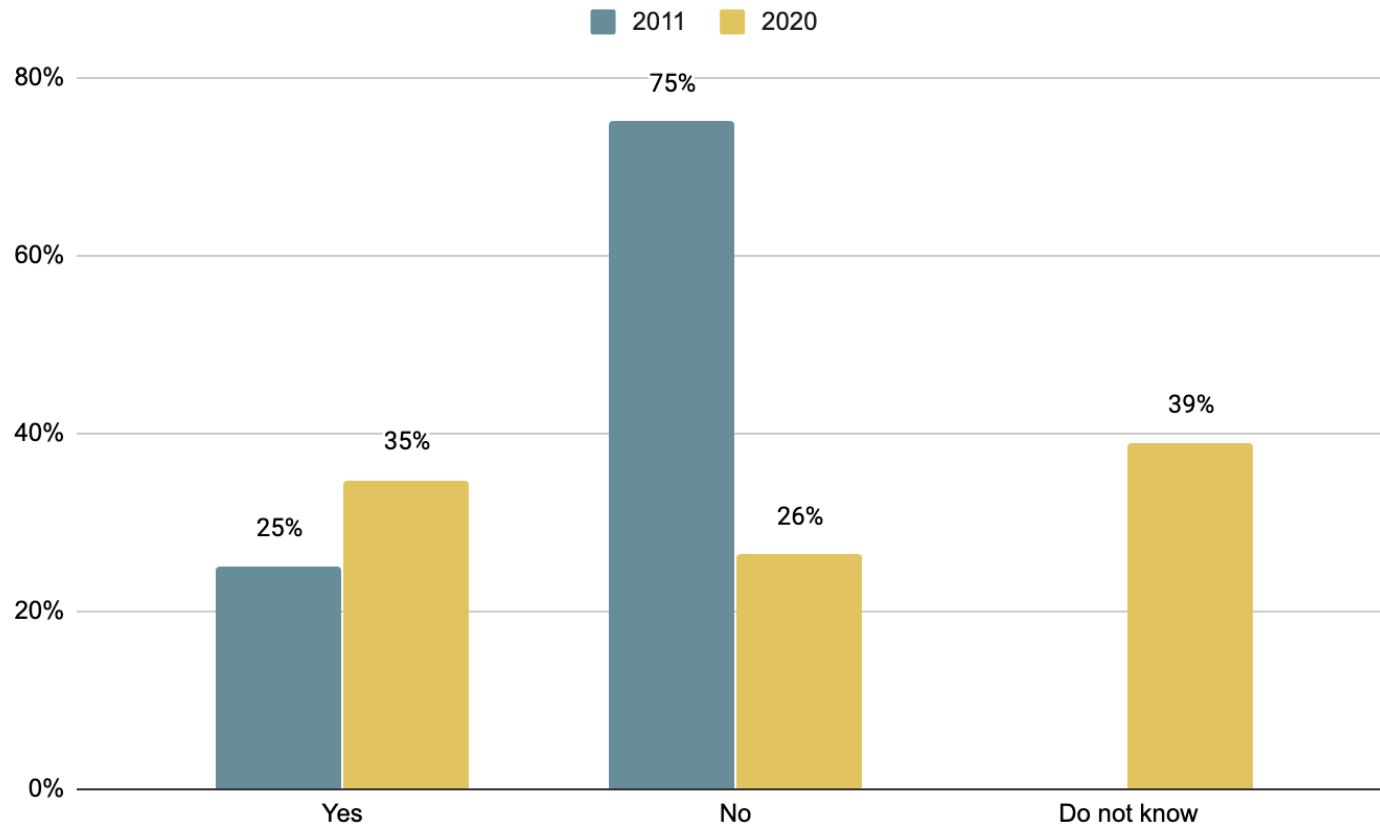
42% of respondents have attended a CLE or other event about diversity/inclusion in the last two years.

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

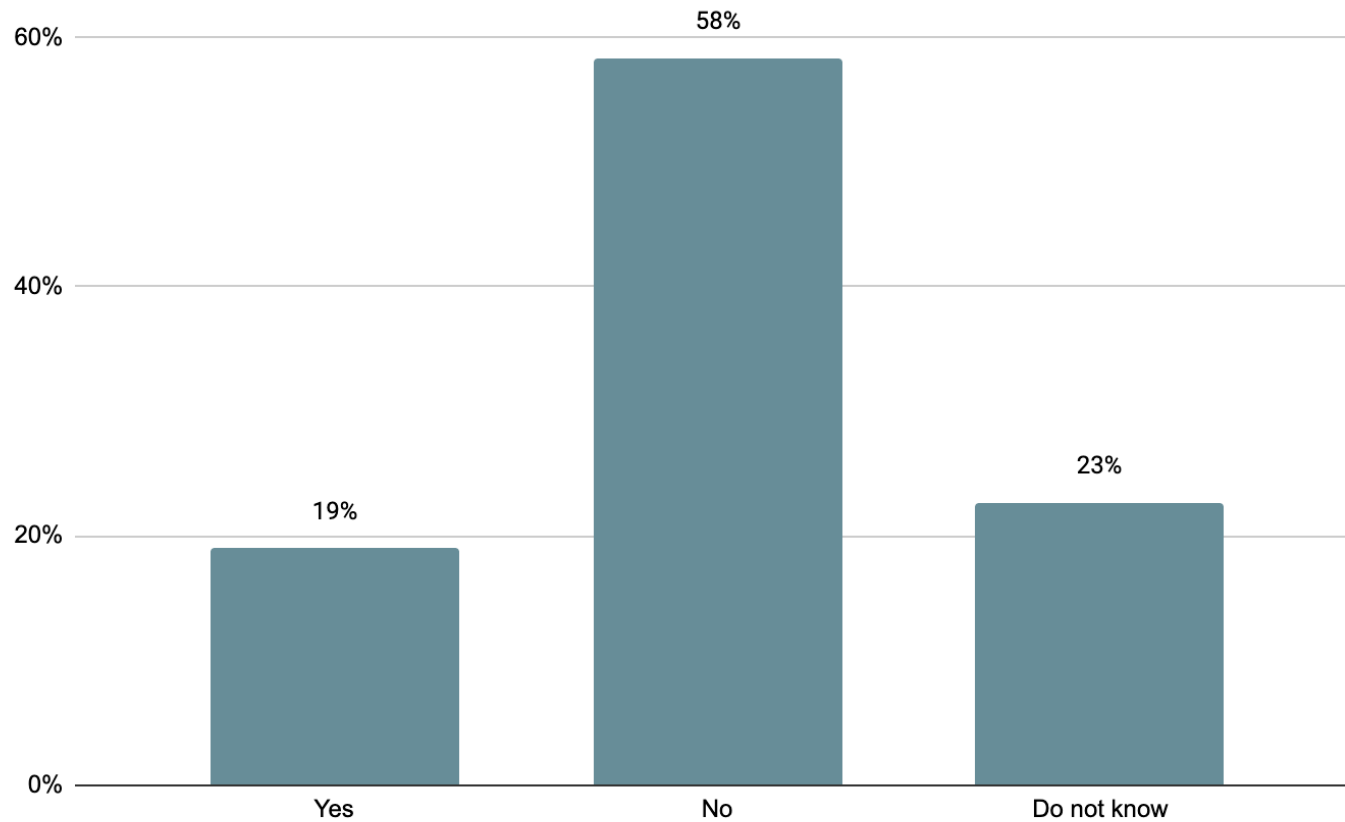
Please select all that apply.



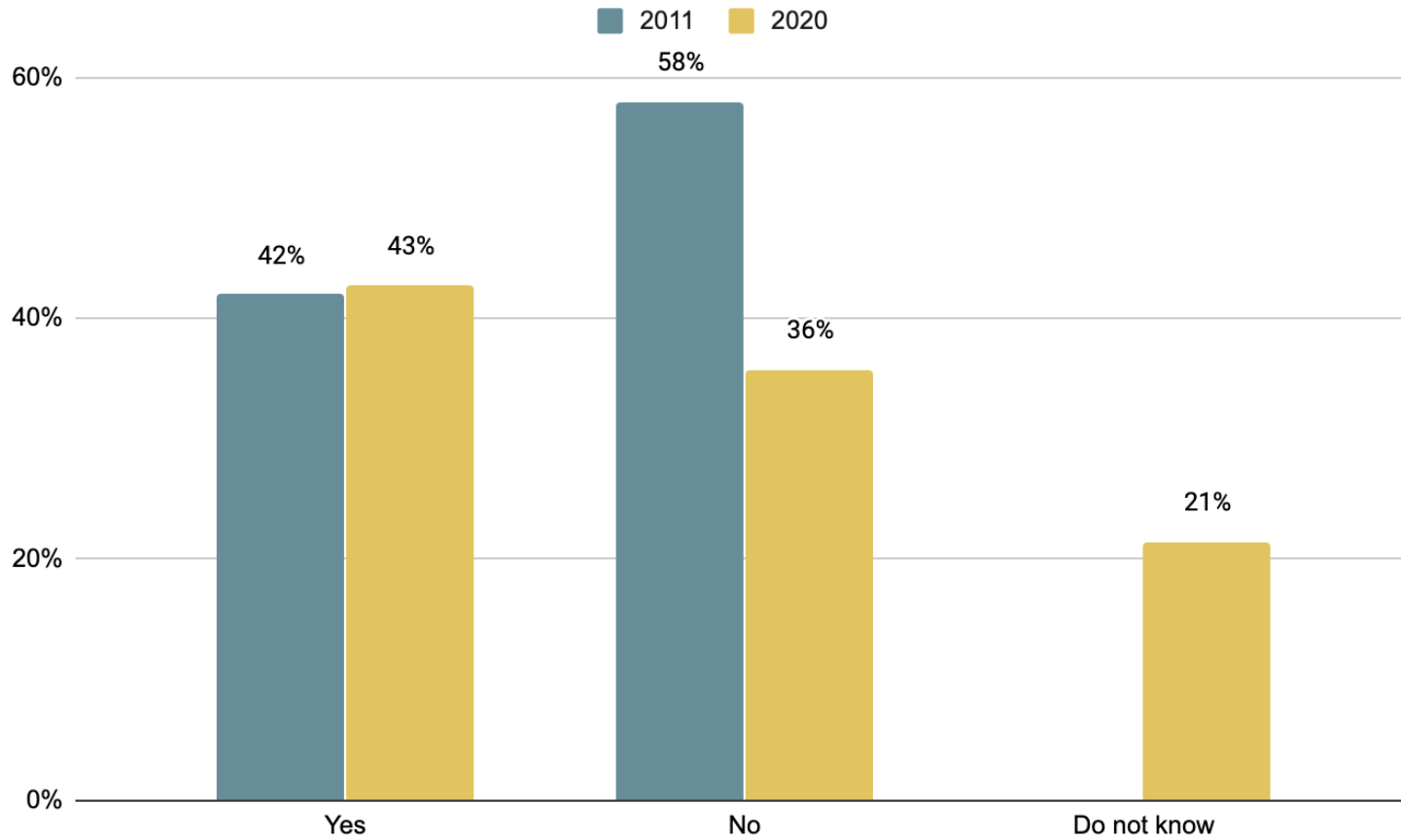
Do you have clients who emphasize diversity/inclusion within their own office?



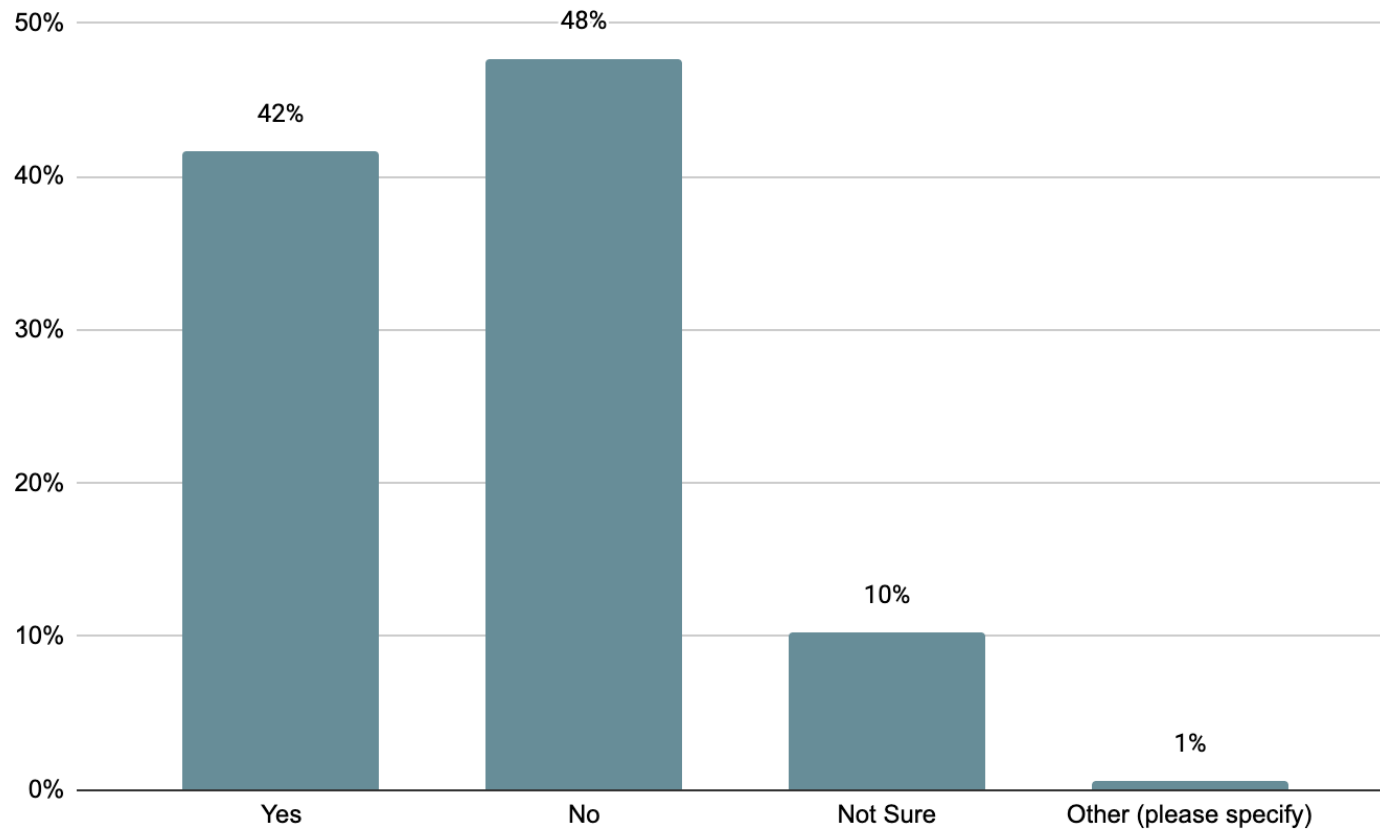
Do you have clients who request that you establish and/or follow a diversity/inclusion policy?



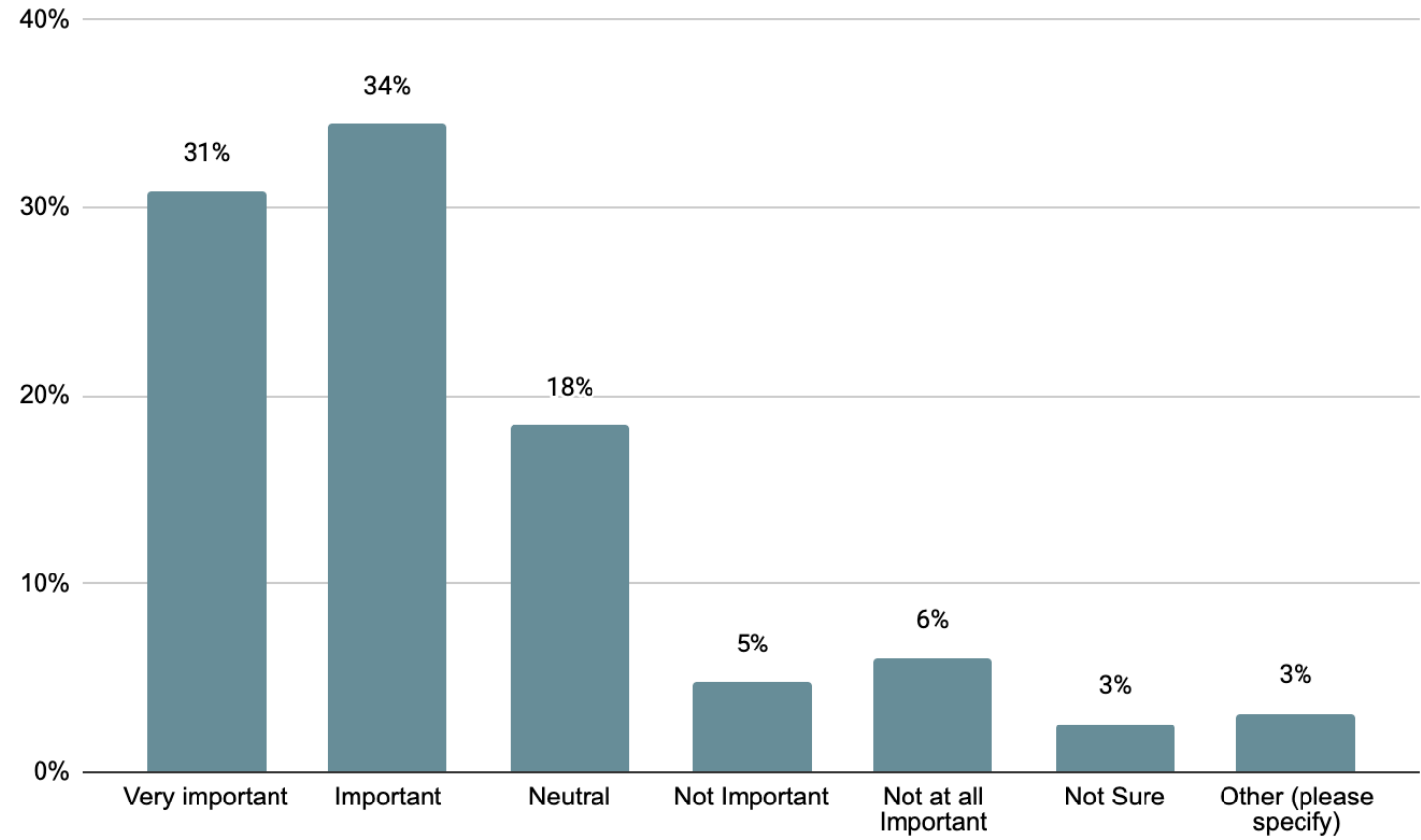
Do you have a diversity/inclusion policy in your firm/office?




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



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



Courts, Professionalism and Civility, and Access to Justice



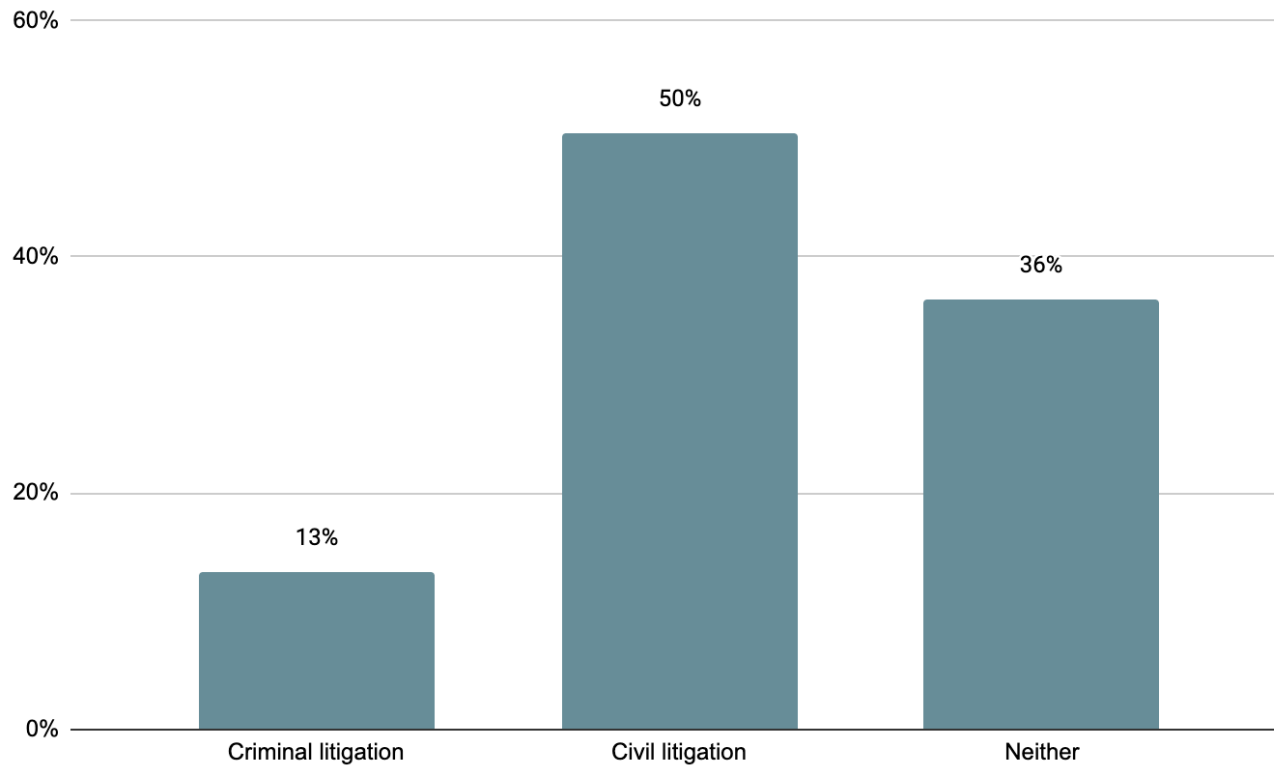
The percentage of survey respondents who believe the public views lawyers *positively* has increased 24% from 2011 to 2020.

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

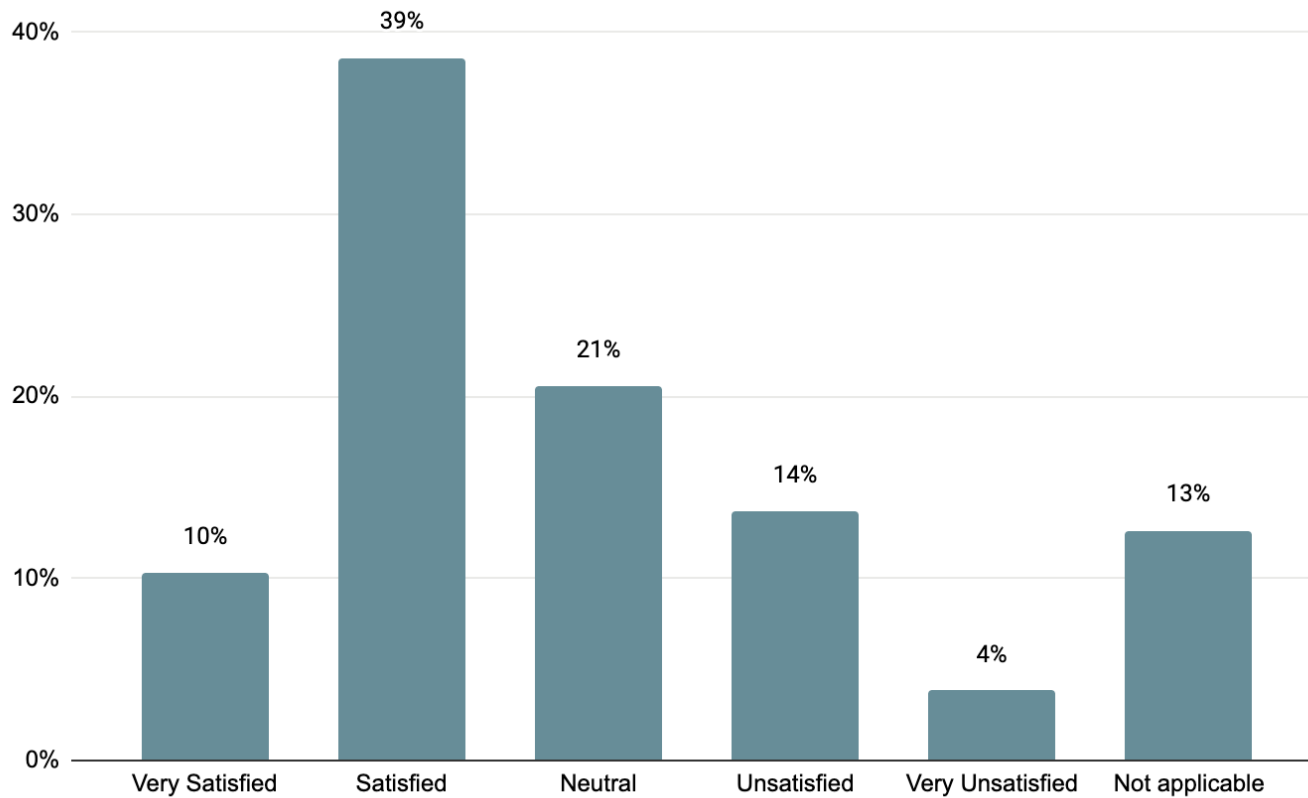
The majority of survey respondents are not aware of the *Narrowing the Access-to-Justice Gap by Reimagining Regulation* report.

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

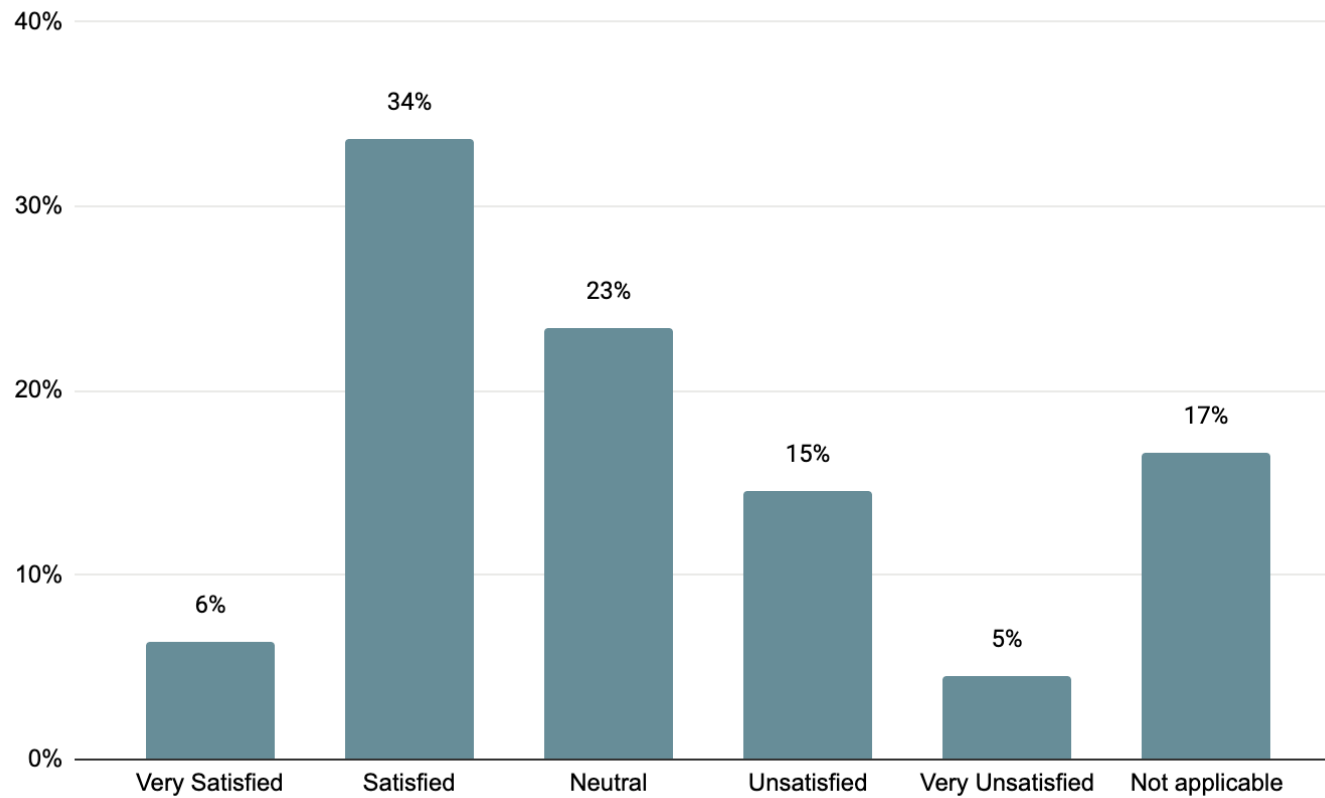
Is your practice primarily in criminal litigation or civil litigation?



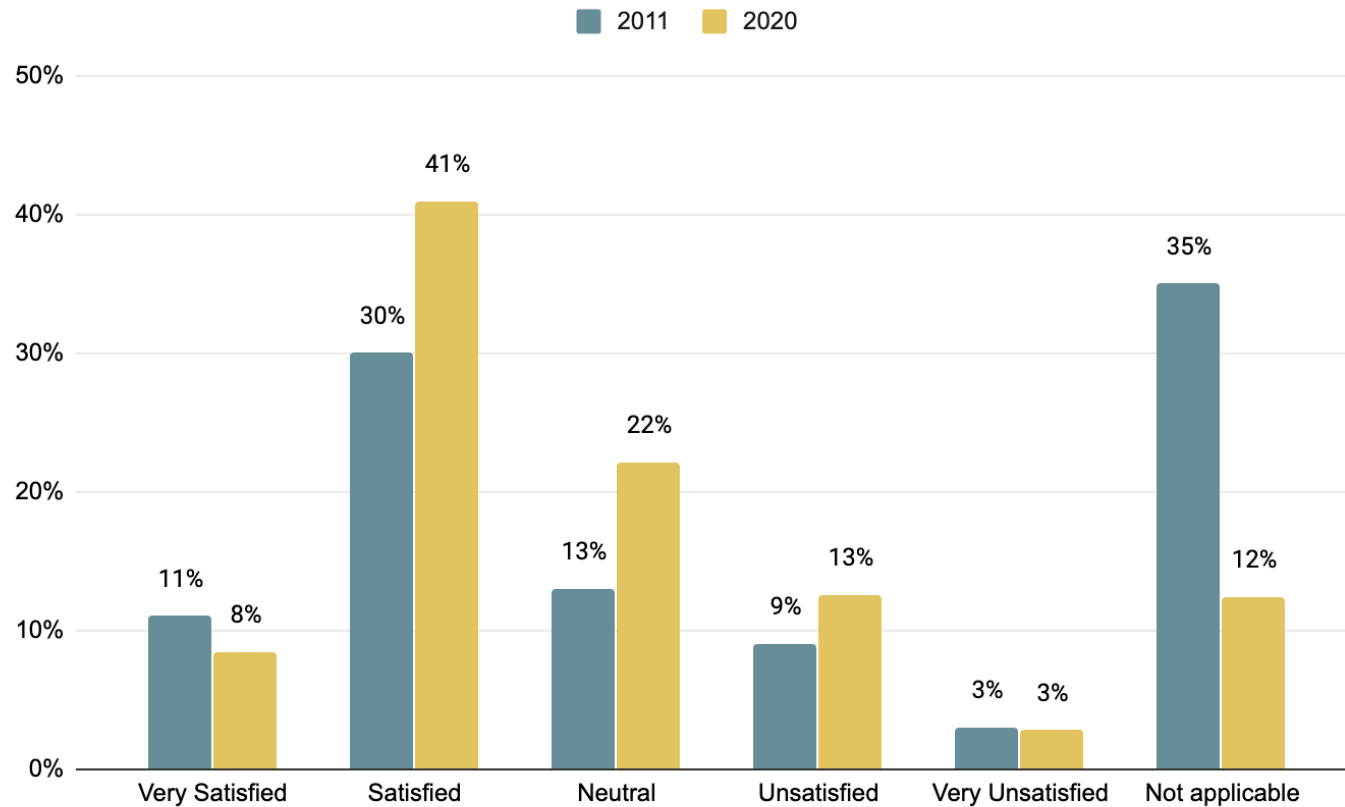
With respect to the Utah State Courts, please rate your satisfaction with the ability to get a timely setting for hearings.



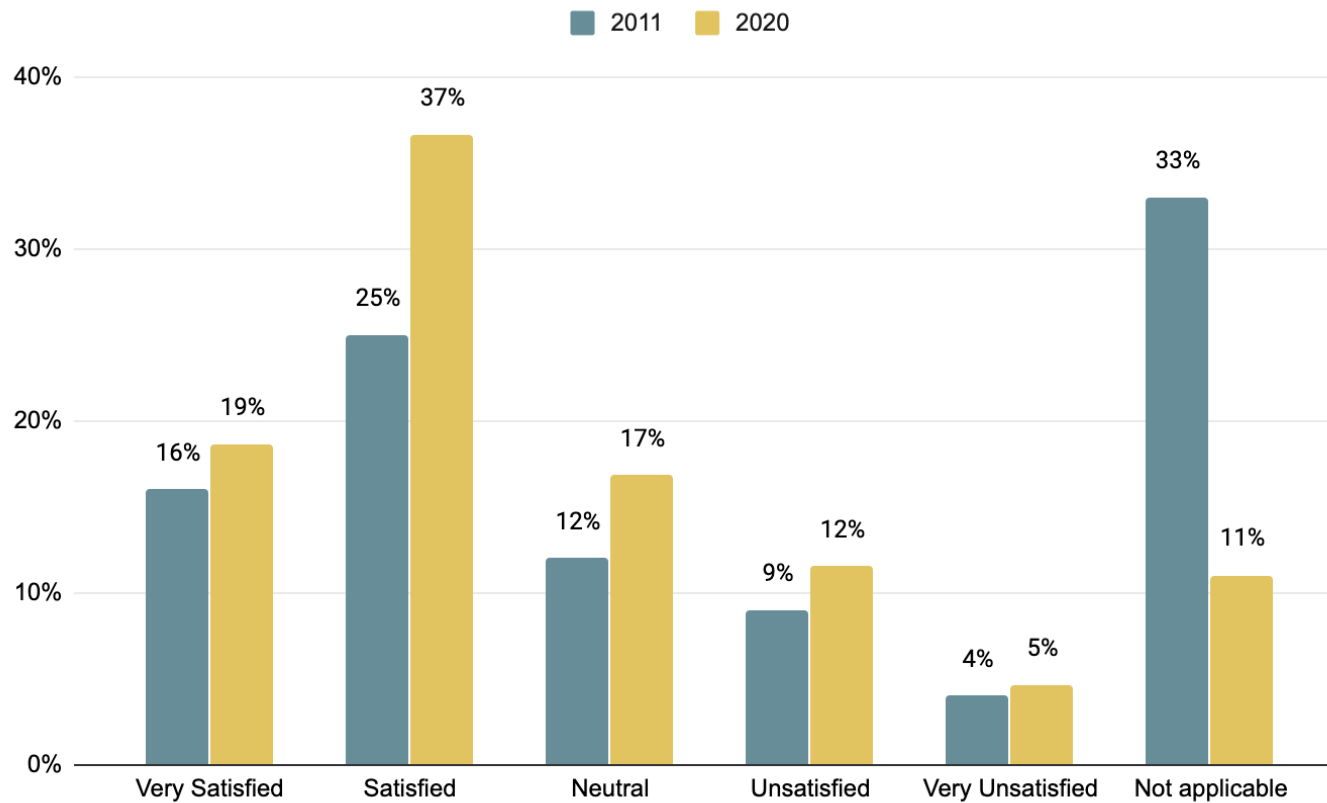
With respect to the Utah State Courts, please rate your satisfaction with the ability to get a timely setting for trials.



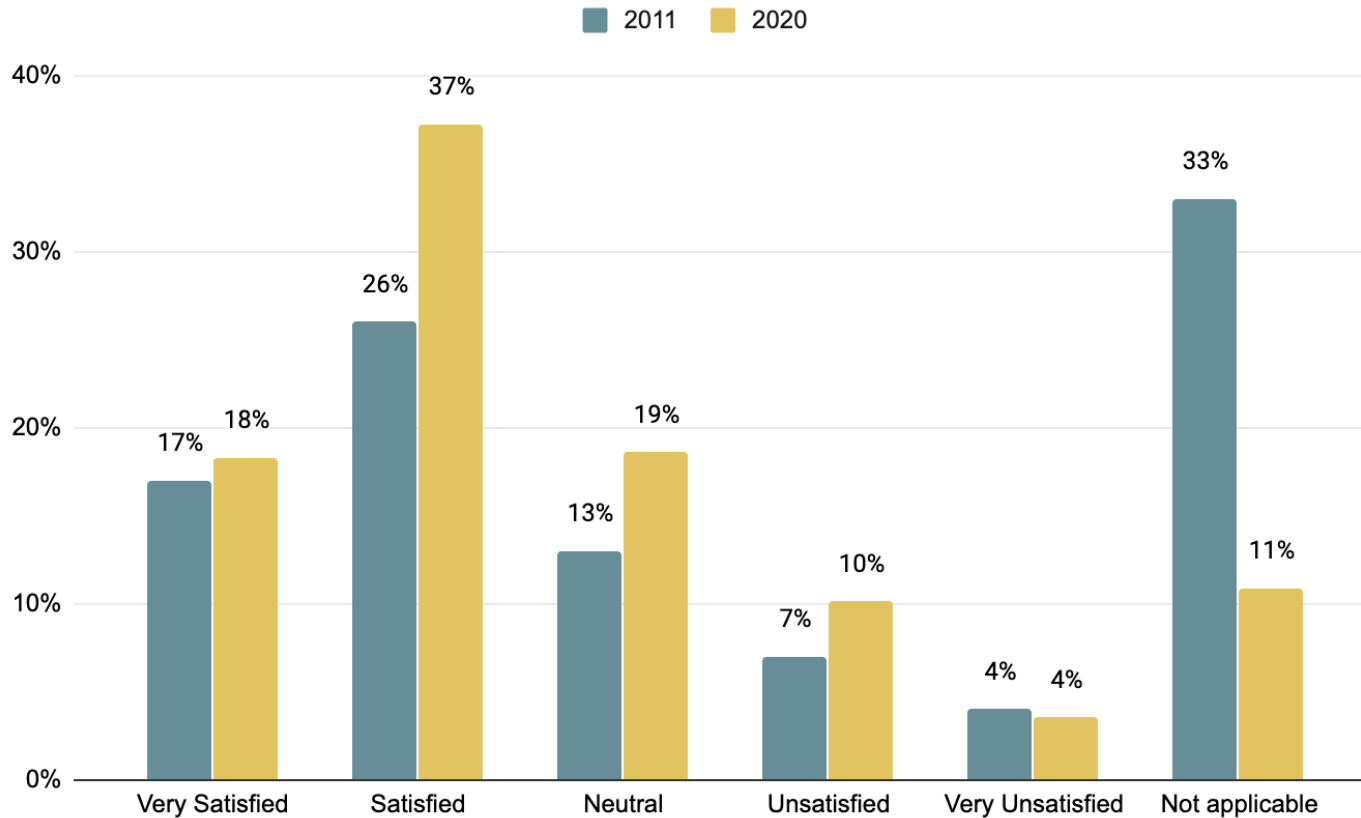
With respect to the Utah State Courts, please rate your satisfaction with the ability to get timely decisions from the Court following a hearing or trial.



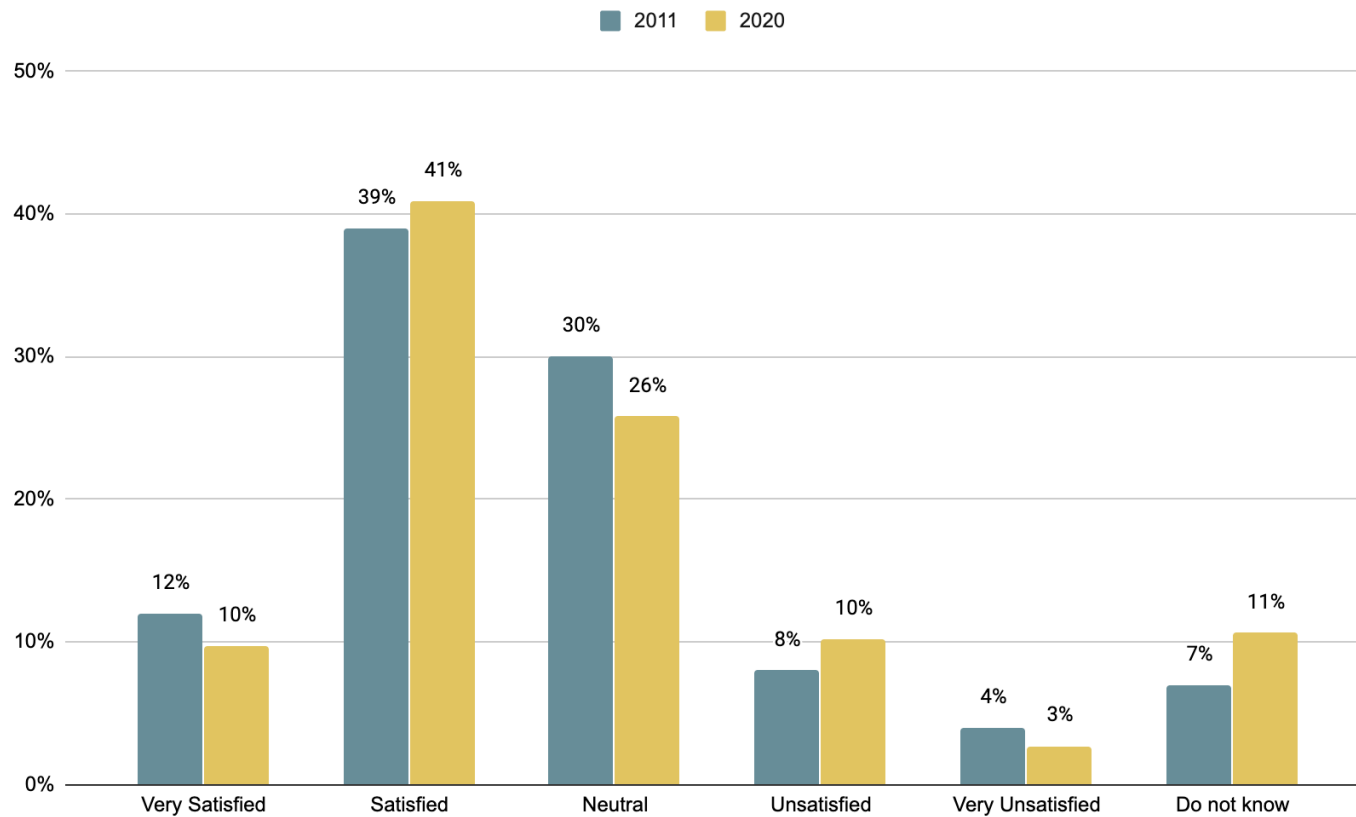
With respect to the Utah State Courts, please rate your satisfaction with the ability to reach clerks or court staff to make an inquiry.



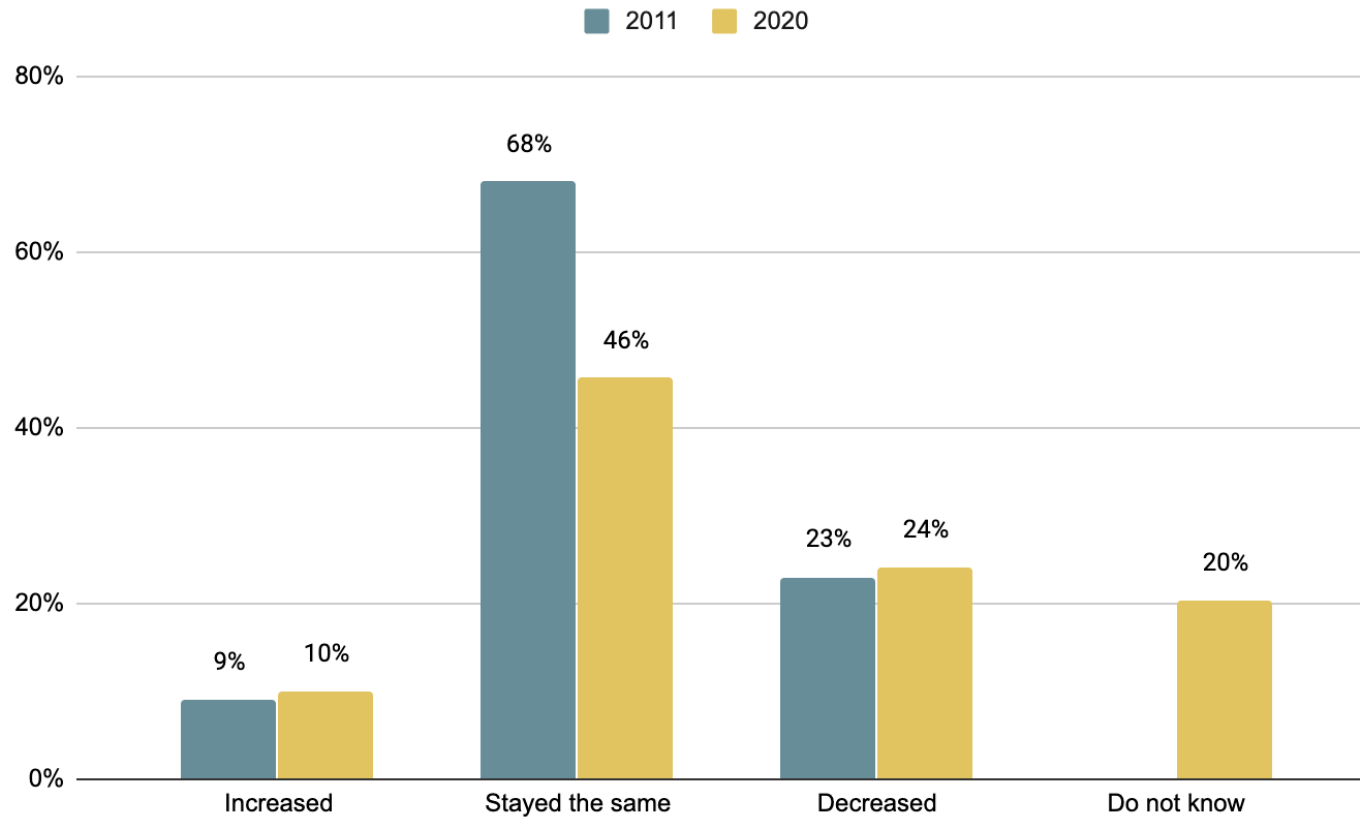
With respect to the Utah State Courts, please rate your satisfaction with the responsiveness of courts or staff to inquiries.



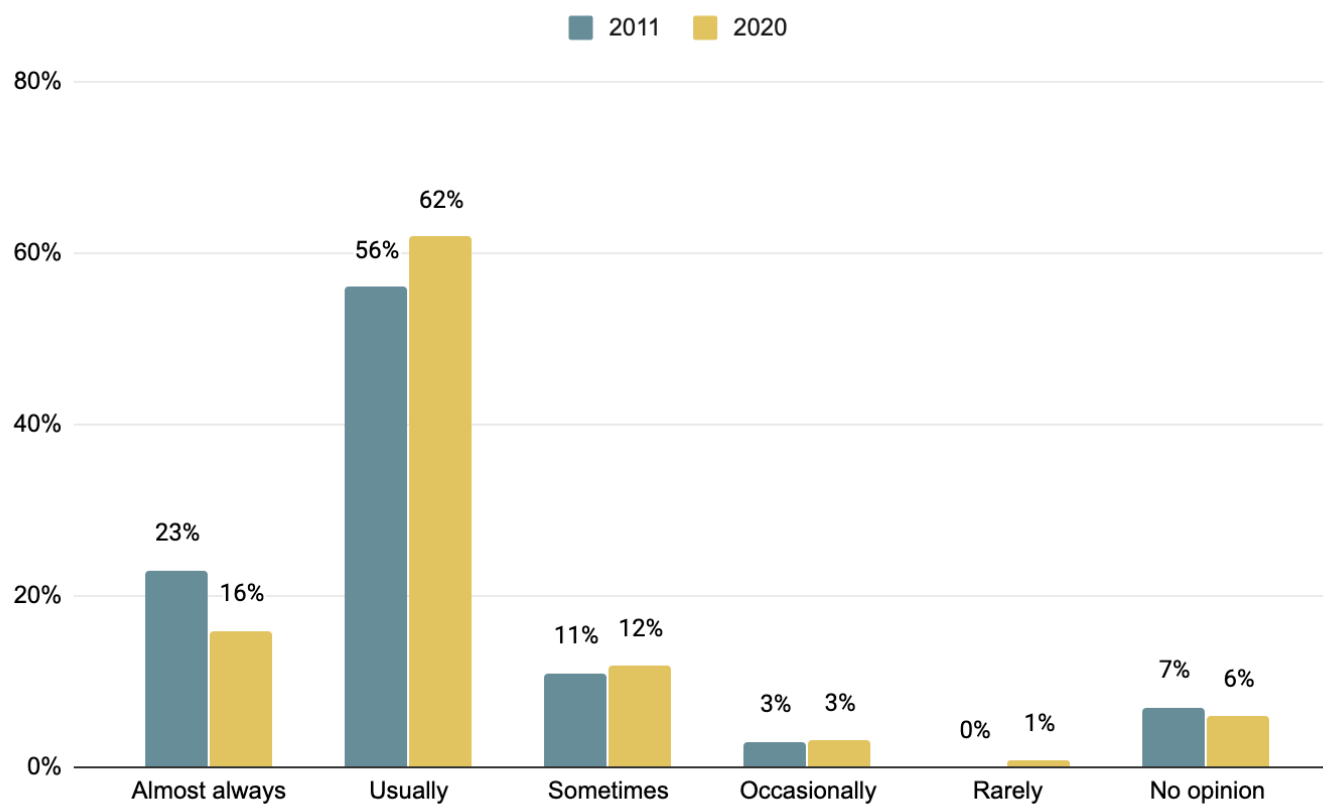
Please rate your satisfaction with the efforts of the Utah State Bar and Judiciary inside the courtroom to improve professionalism and civility among lawyers:



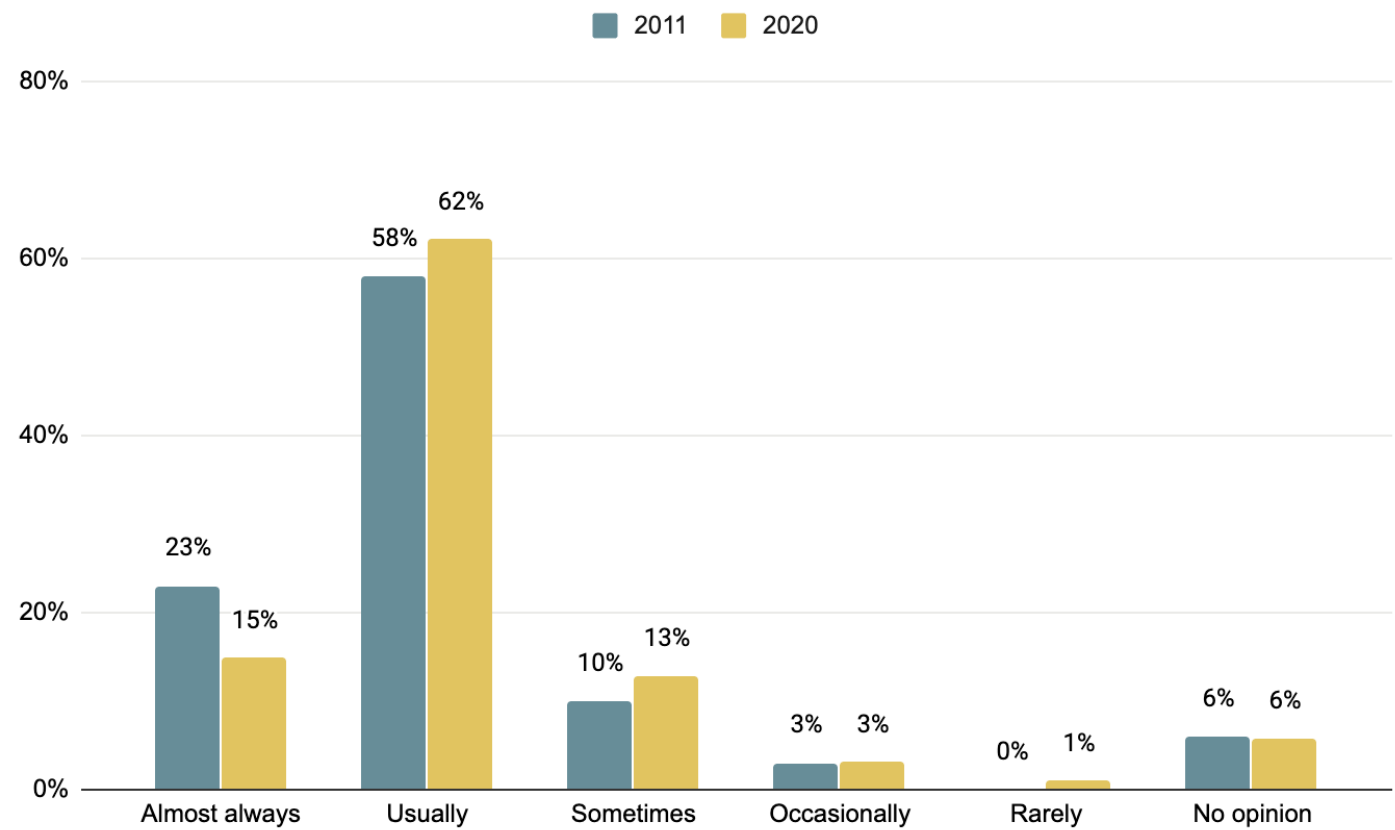
In your opinion, how has the level of professionalism and civility among lawyers changed over the last five years?



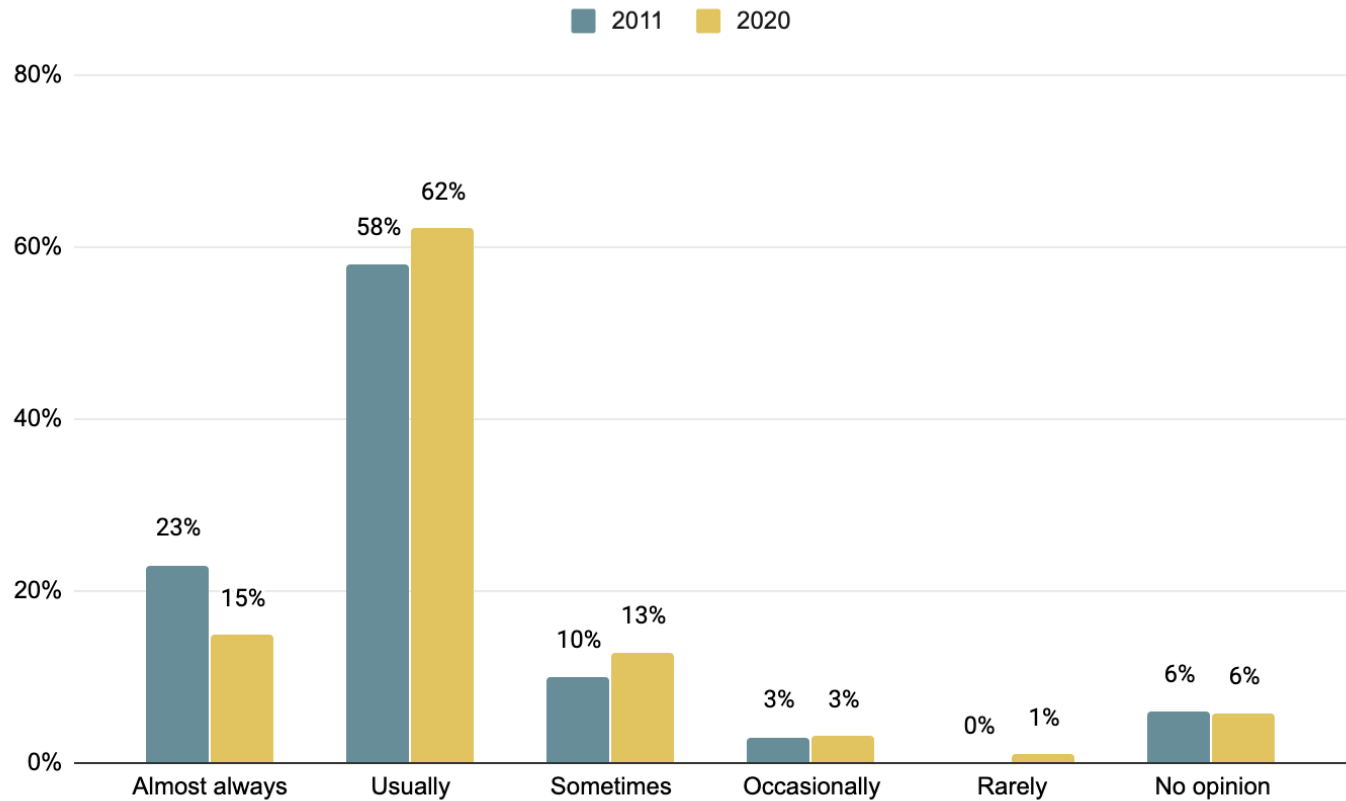
How would you rate Utah lawyers as a group on the following attributes (honest):



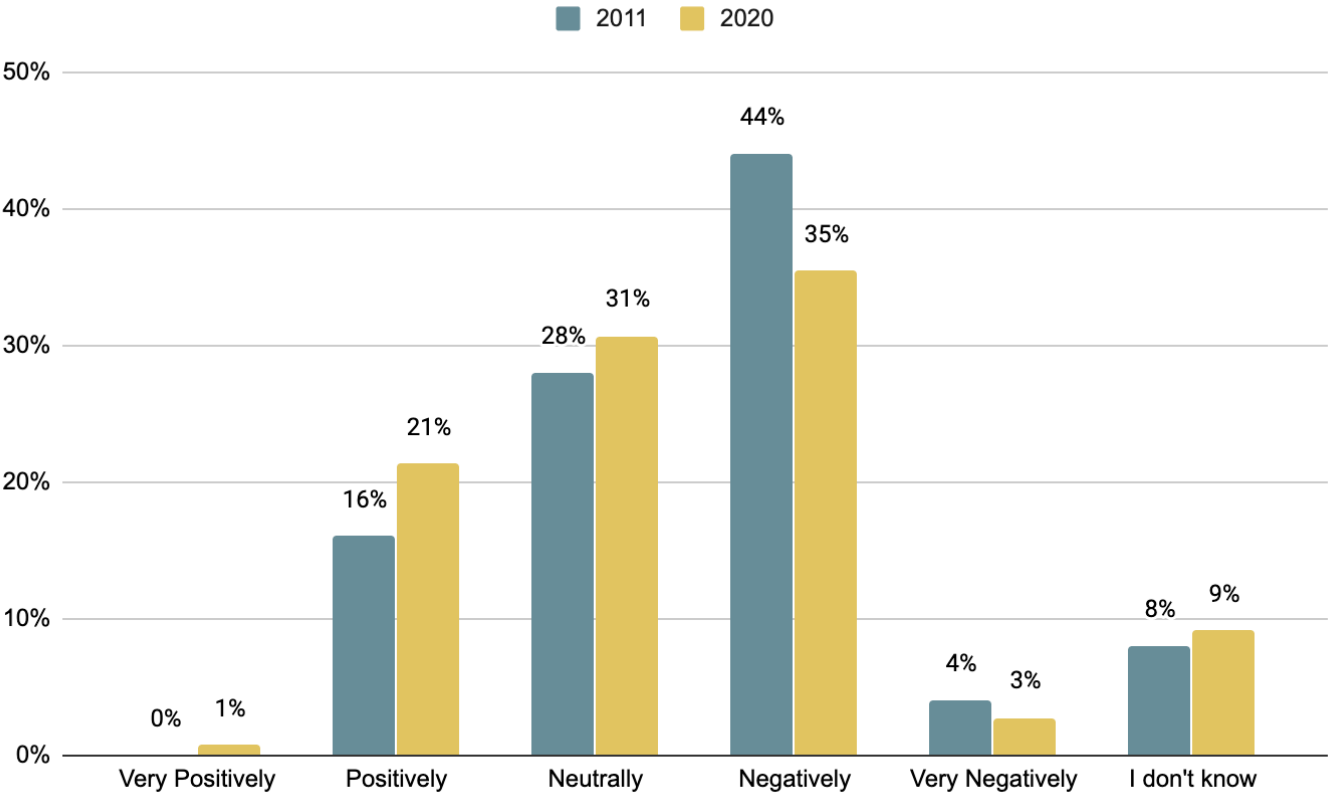
How would you rate Utah lawyers as a group on the following attributes (ethical):



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

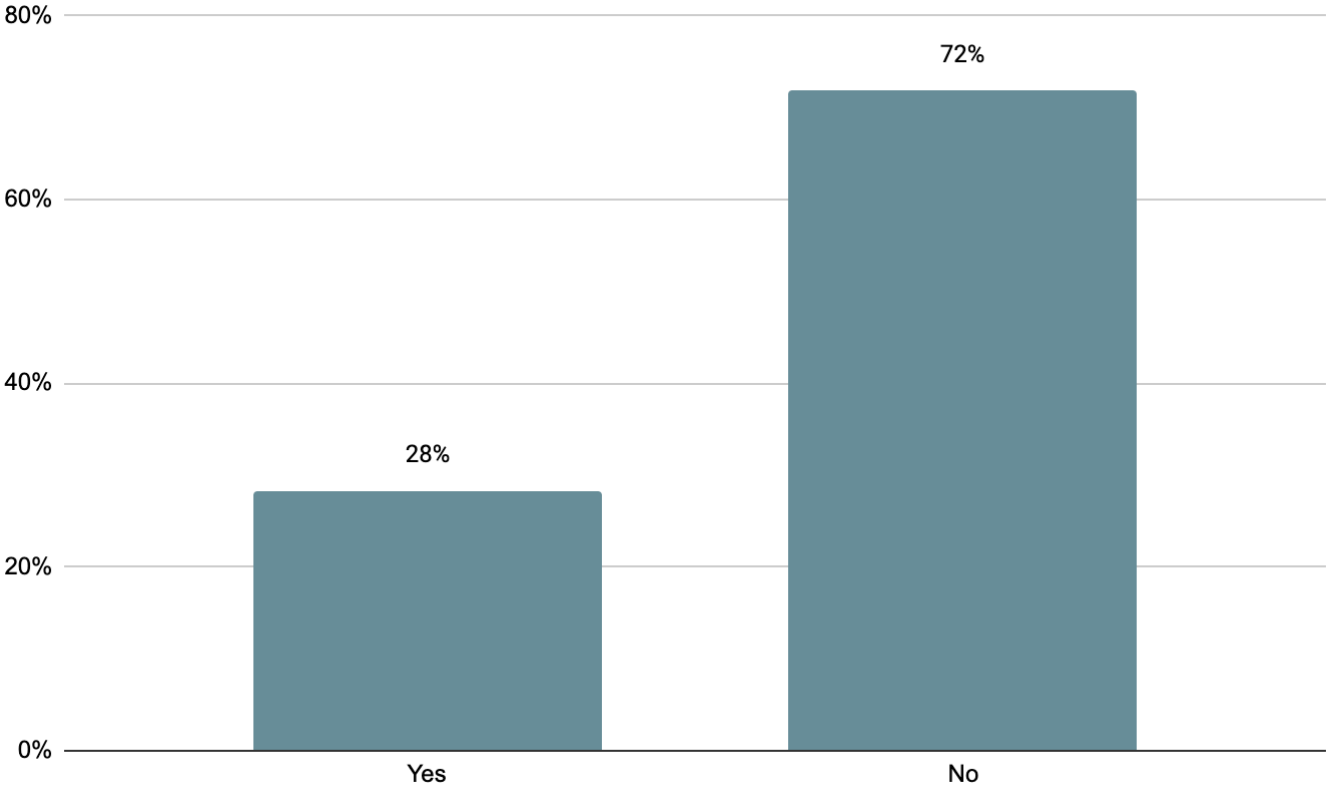


In your opinion, how does the public view Utah lawyers?

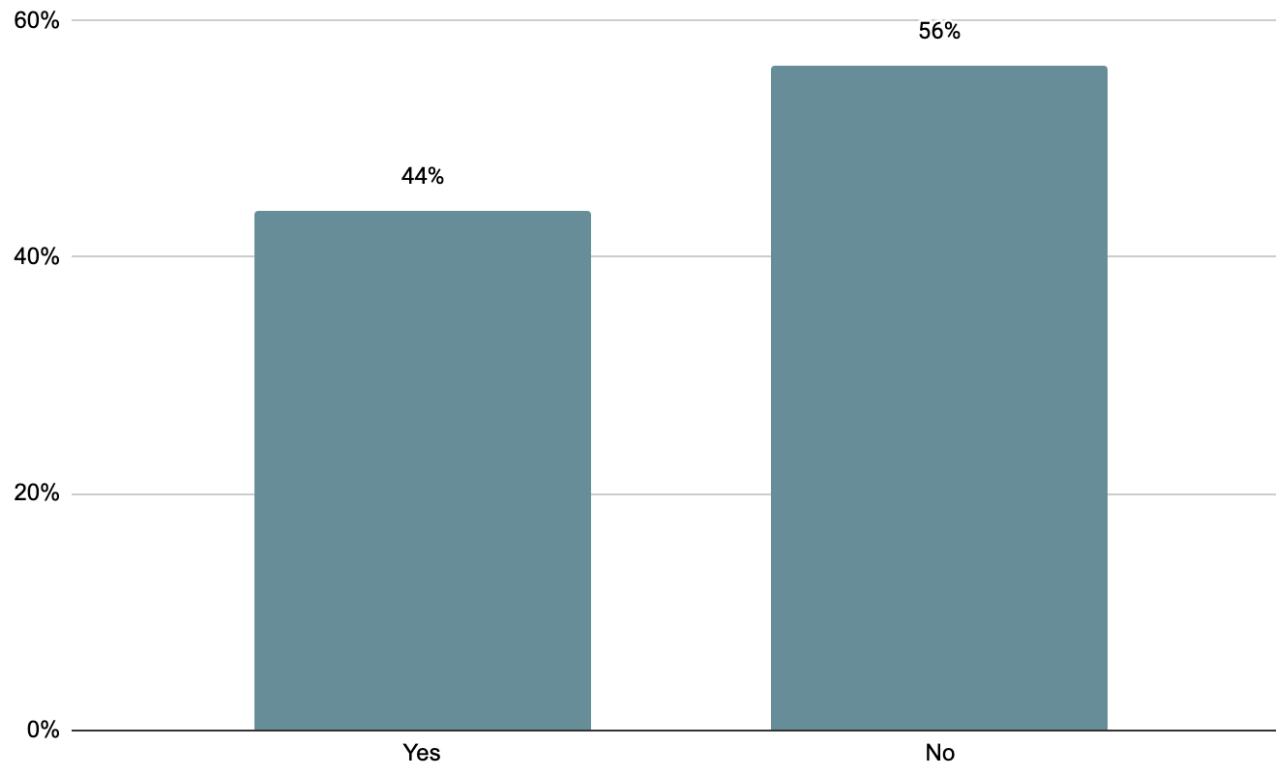


The Utah Work Group on Regulatory Reform has recently released a report called **Narrowing the Access-to-Justice Gap by Reimagining Regulation.**


Are you aware of this report?



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



Advertising



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

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

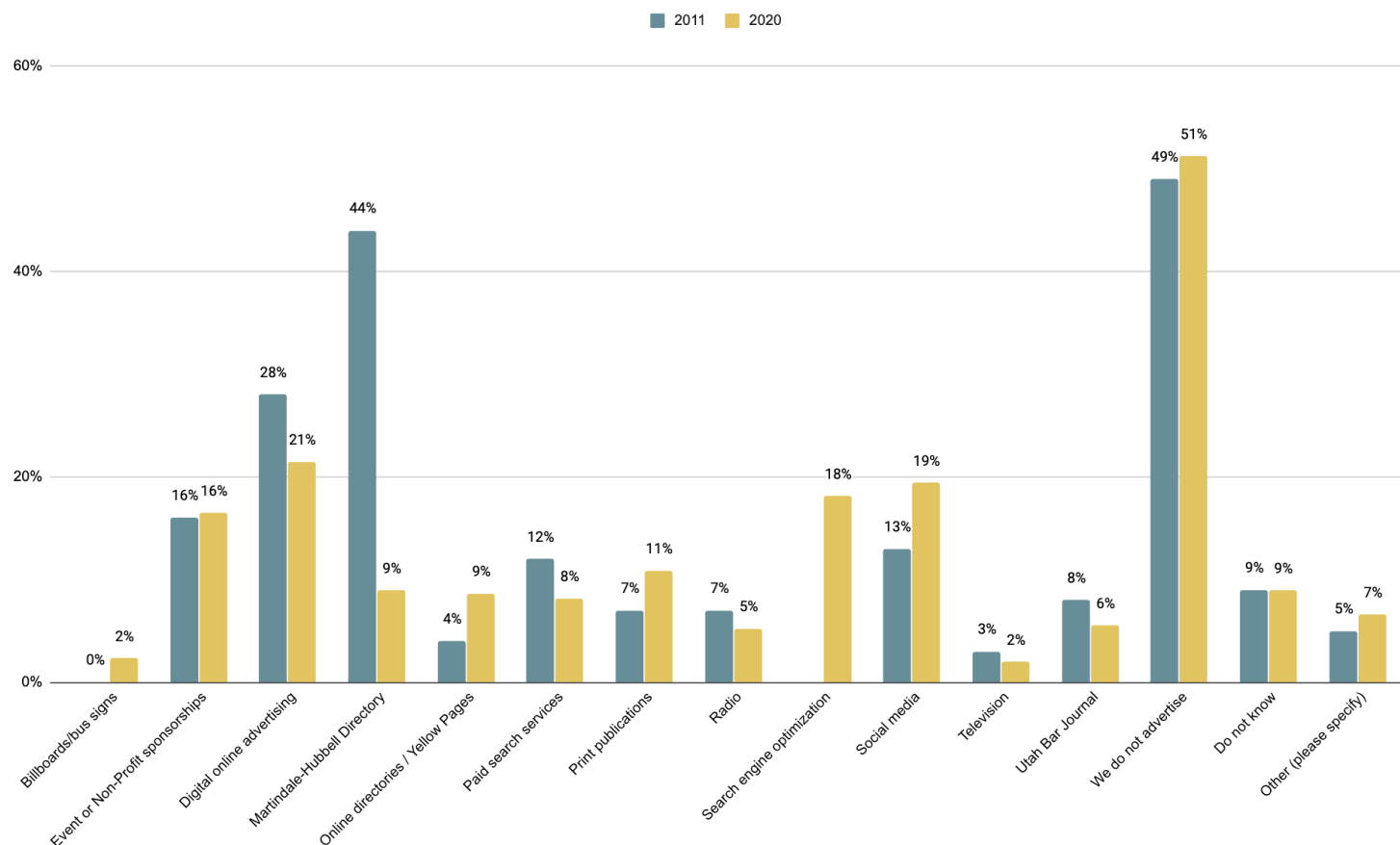


One-third of survey respondents say they allocated 0% of their office's budget for advertising in 2020.

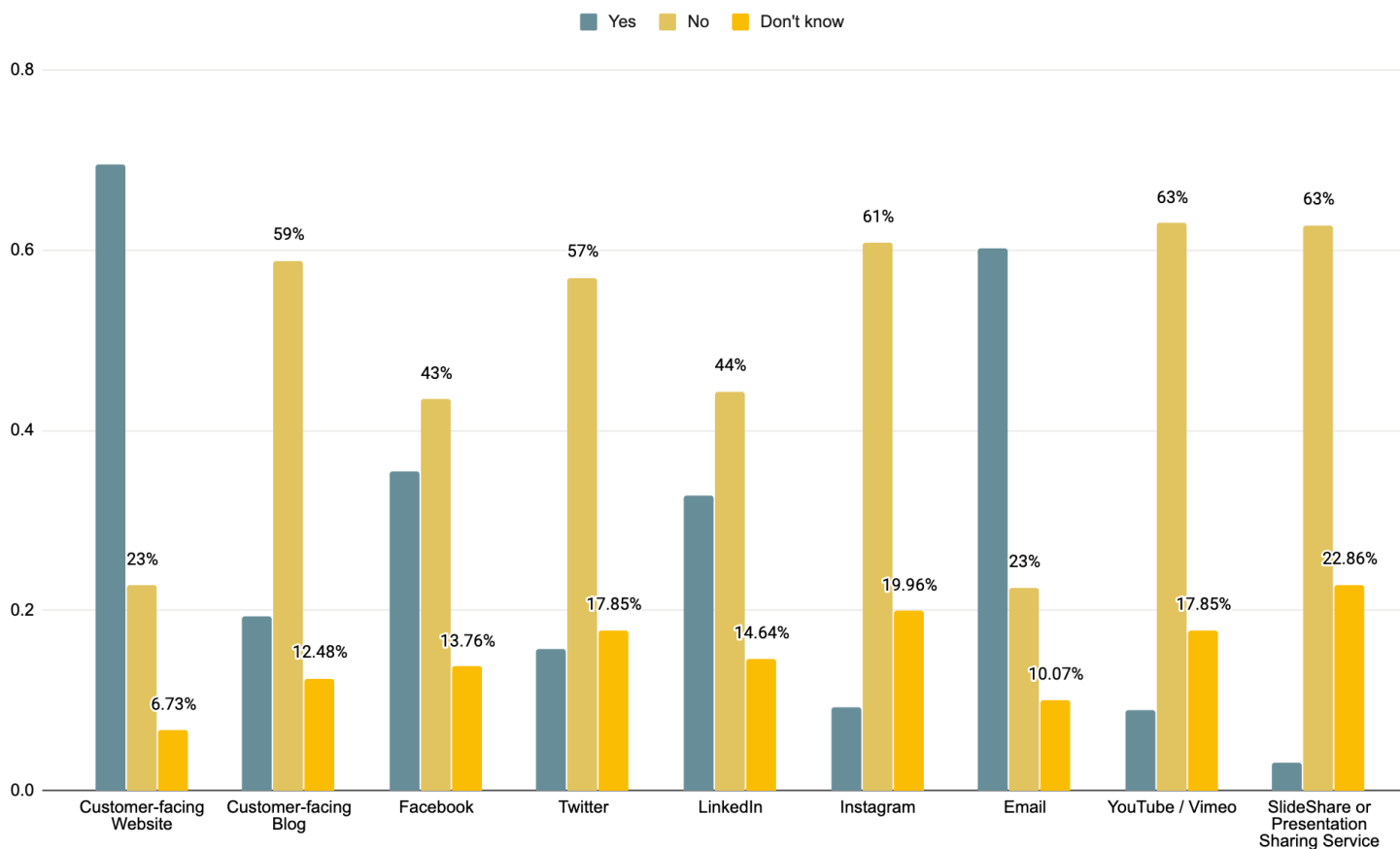
34% of survey respondents say 0% of their office's budget is spent on any advertising.

How does your office advertise its legal services?

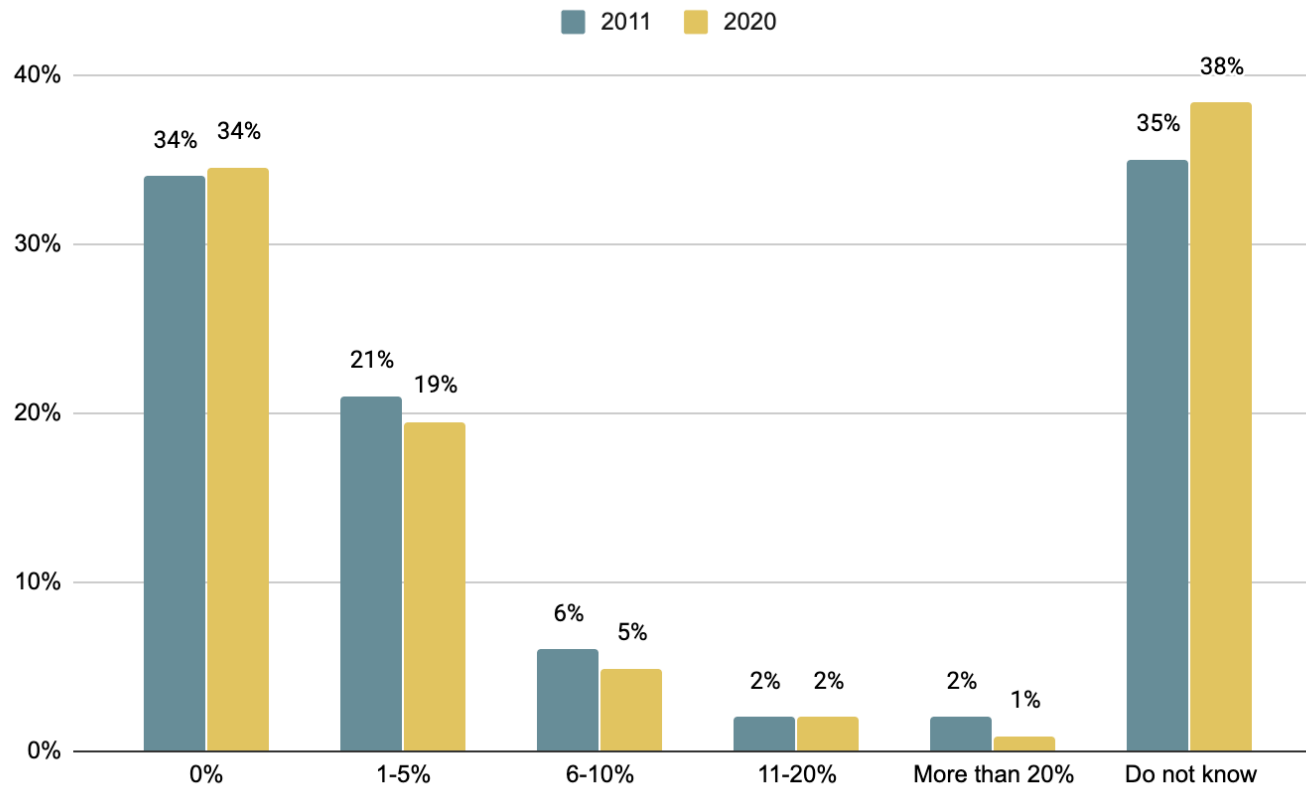
Please select all that apply.



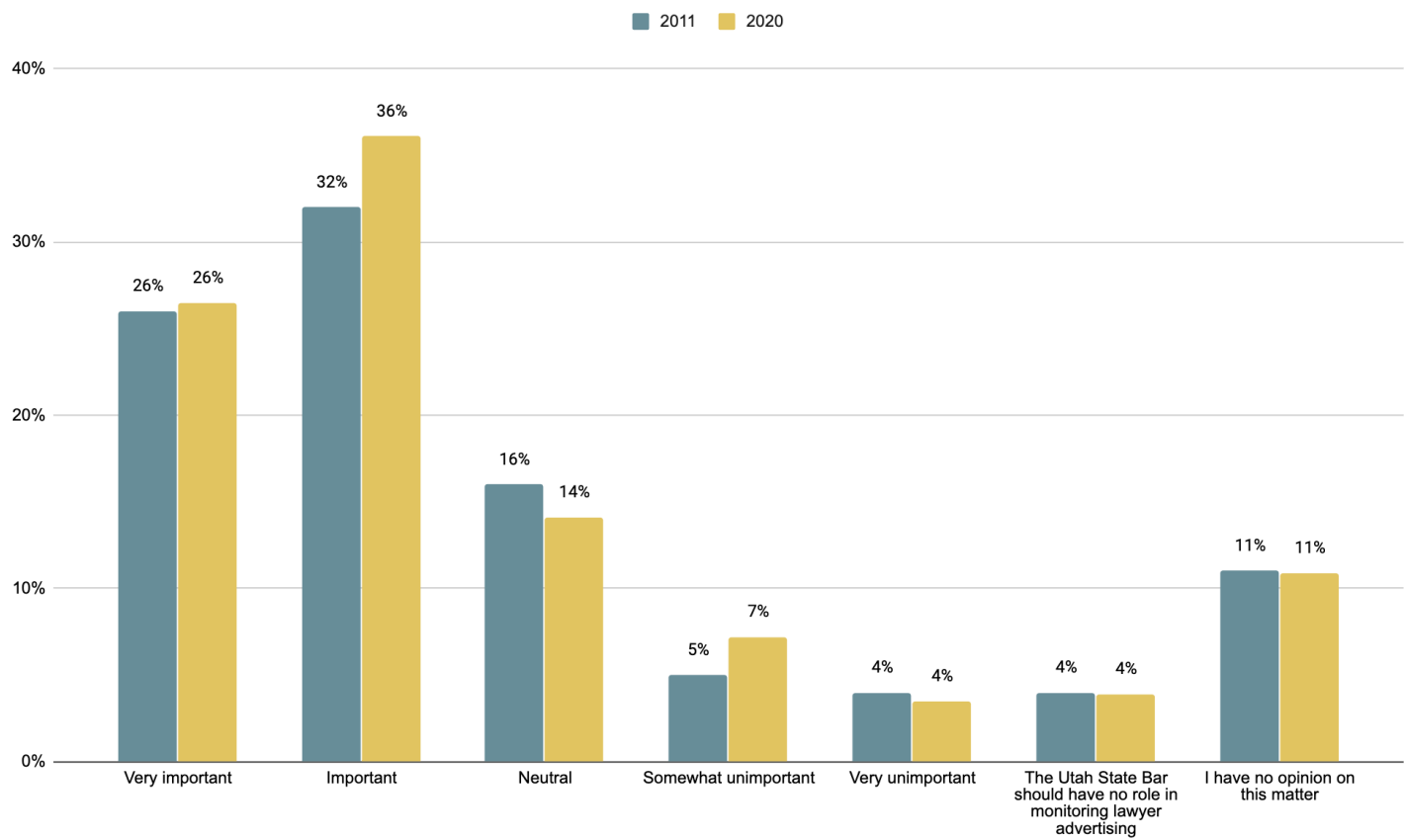
Does your office maintain a firm or office presence (other than as individual lawyers) on the following web-based media?



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



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



Other Questions

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

Question 11: What size / type is your office?

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

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

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

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

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

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

Question 12: What position do you currently hold?

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

- Raising a young family limits my availability to do pro bono work
- Not allowed by employer
- no time
- Time constraints with work and young family
- Most pro bono requests are either family or criminal law related. I don't practice family law and criminal law often poses conflicts for me. which
- not applicable to my field
- I take pro bono cases in as the Guardian ad Litem in Juvenile Court on a rotating basis. I have not had a pro bono case during the past year due to my need to care for a family member who has had several health care concerns.
- Practice areas do not include typical pro bono cases
- Childcare
- No pro bono necessary in contingency practice areas like PI
- No time
- treasure free time
- No malpractice insurance outside of work
- I do pro bono work by choice regarding various cases; I am not opposed to doing pro bono work when requested by the Bar
- Semi-retired
- Not a lot of exposure out of state
- Doing Pro Bono means doing more work
- Worried will be too much
- Not incorporated into company structure and can't take off work to do it.
- No obstacles to PB work
- It's a public defender office--all is pro bono
- difficulty with scheduling and potential conflicts
- Lack of time
- Government Employee
- Balancing time demands
- time
- The number of hours I have to put in at work
- Personal commitments
- Lack of time
- Don't want conflicts of interest
- We carry enough clients for lengthy periods.
- Too busy with paying clients
- Too busy
- Not really interested in doing more
- No time
- No relation to pro bono needs and intellectual property law
- Time limitations in doing more pro bono
- My role as elected official limits my pro bono options
- I do the max I'm comfortable with doing
- I'm mostly retired.
- General work life balance limitations
- Church service
- Lack of time. I do a high percentage based on the hours I do work.
- time
- I just got a new job, a lot of these questions don't apply.
- We end up doing work that we know we will never get paid for because it needs to get done for clients.
- lack of time
- Service commitments in other legal organizations
- No care for adult disabled child
- not permitted per government
- other interests
- Time available
- Busy
- Limited opportunities given position
- Time constraints outside of work. The question presumes work is the only factor in life, which is a lame presumption.
- Significant hours at work and many other demands on time
- None
- As a conflict public defender, I do plenty of uncompensated work.
- Other case commitments take too much time
- Lack of time
- Don't have the time to draft and research pro bono representation agreements
- rather spend time where needed with family
- Lack of time to go out and find those needing pro bono work
- None
- No time.
- Not enough time
- Time constraints
- Executive responsibilities
- I do not experience obstacles
- Other commitments
- Lack of time - especially when I'm not in a legal job.
- No time
- Area of expertise precludes pro bono work
- Most of my hours are pro bono work
- Not enough time
- I don't have enough time to do the work I have.
- Just not enough time.
- In house and cannot do pro bono
- locating pro bono cases
- no barriers
- do plenty
- Don't care to do any
- Pro bono clients demand too much and are not engaged enough. Low bono is much more effective.
- As a public service employee I am serving the community.
- conflicts because I was a Government attorney
- Not many pro bono clients in my rural community
- POSSIBLE CONFLICTS
- As a government lawyer, I feel like I'm already doing public service for less money than I could make other places
- Single working mother—time
- Employed by state government; cannot represent outside clients.
- Not able to do pro bono

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

reduce my fees for low income parties.

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

judicial office

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

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

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

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

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

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

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

- NLTP
- Pay my bar dues
- to obtain the general referral number
- NLTP information
- pay dues
- Renew my license
- Pay dues
- Renew license
- Pay my bar fees
- Renew bar membership
- check enrollment status
- Login/ check my transcript/ obtain contact info to submit forms for MCLE credit.
- to check on status of my CLE, etc
- License and CLE renewal
- CLE reporting
- Update my page for Find Law
- Track my own CLE credits, update information
- Pay Dues
- CLE classes completed
- License renewal
- looking at my CLE credits etc...
- CLE requirements
- re-licensing
- Check on CLE credits/pay dues
- Vote for officers, renew bar membership, submit CLE compliance
- To pay senseless bar dues
- To get forms
- Obtain CLE report
- When you have to renew your bar license
- Annual registration and tracking completed CLE.
- Check CLE transcript
- Confirm my CLE status
- pay fees
- Check on CLE status
- New Lawyer Training Program materials
- Pay fees
- Look at Bar's group benefits (not that they're that great)
- Bar Renewal Process
- Check CLEs, NLT mentor program info
- Find a lawyer to refer work to.
- Check my CLE status
- Beneplace
- Find my current CLE status
- CLE status and billing status
- Trying to create a successful Irrevocable Trust practice
- Renew my license
- renewing license
- Pro Bono Opportunities
- track CLE hours
- pay bar dues
- Check on my CLE compliance.
- Just to renew my license
- Looking up CLE rules, status, procedures
- Practice portal
- Commission agendas
- Renewing my license
- Check on CLE status
- pay bar dues
- Jobs
- License renewal
- CLE compliance, payment of bar dues
- Mentoring issues
- Check My CLE hours
- To pay fees
- dues
- Check CLE status
- Actually I rarely visit the website just annually
- CLE compliance
- Renew license
- Personal account information
- Check on my CLE progress
- renew licensing fees
- Get forms
- Verify my bar status for employer
- Pay dues
- Pay bar dues
- Look at member services
- Only if I have to to renew license
- CLE reporting and annual dues
- Review Leadership agendas and materials
- Bar renewal
- CLE
- Pay bar dues
- CLE compliance

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

searchable electronically both present and past editions.

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

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

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

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

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

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

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

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

Keep it in PC'

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

for a small sector of the Bar membership.

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

detriment of good high quality capable legal representation.

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

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

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

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

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

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

Question 71

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

actually preside in court.

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

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

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

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

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

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

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

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

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

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

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

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

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

Utah County

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

Perhaps have a category for part timers with reduced dues.

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

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

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

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

way or another, Thank you.

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

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

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

- There are a couple of really awful judges. They are universally regarded as incompetent, lazy, prone to prejudging cases, chauvinistic, look for the easiest way out of case/least amount of work, etc. There needs to be a better way to get them off the bench, a bench which is otherwise exemplary. For judges that are incompetent, it is not enough that the errors of these judges can be corrected on appeal. Most clients cannot afford to litigate in the district court and should not have to wait for a year or more for an appellate court to reverse a decision. Therefore, it is unreasonable to respond that errors can be fixed on appeal. This also does not. Most judges are great. Some have a bad attitude or biases and at least one, strays often from sound legal reasoning.
- In my eight years of practice, I have seen a general decline in attorney's willingness to discuss matters over the phone and instead rely solely on email communications. I believe the Bar should address this issue and recommend updating the rules to bar an attorney from refusing to engage in phone discussions without any basis.
- Thanks for your work on behalf of attorneys in Utah.
- I miss being a full time practitioner, but find that my legal experience is helpful in my church experience.
- I went fast but It took for than 15 minutes
- I would like to see a change that judge's clerks do more by email, like setting hearings and communicating with the attorneys so we don't have file Motions and such to change hearings.
- I have attended the Summer Convention, the Spring Convention, and the Fall Forum on occasion, but I don't regularly attend them because I get my CLE elsewhere. I only attend when there is a speaker I really want to hear or I have some other particular reason to attend.
- I hope we go back to Sun Valley for the Bar Convention, with Supreme Court justices visiting.
- Thanks for your hard work.
- I work primarily in administrative law (immigration) so that may affect the way my answers should be understood. Also, when I commented about interactions between lawyers, I was not responding within my practice. I was responding based more on what I hear from other attorneys who do civil litigation.
- I am against non-lawyer ownership of law firms. Horrible idea, especially in PI. If we look at other states, we can see what will happen. Super dirty and super grey. Not a good idea.
- I think staggering CLE as 'beginning' or 'intermediate' or 'advanced' is dumb. I think the growing requirements to teach a CLE are making it increasingly difficult to find anyone to be willing to teach - which hurts us all.
- 1)
- I think that the rules of professional conduct are very well written. However, they are nearly useless, because they are not enforced. Those who are professional enough to adhere to them would do so regardless of the rules. Those who are unprofessional, continue to be unprofessional despite the rule, and there's really nothing to be done about it.
- Although I understand that enforcement of professional conduct rules is not an "easy" thing to implement, and issues would arise if the Bar tried to strictly enforce the rules, I wonder if there is more we could do. I found myself very frustrated when working with one attorney, this last year, who was unusually unprofessional and unethical. It seemed like every attorney practicing in his area, and even the Judge handling our case, knew that he was an unprofessional bully. Yet his conduct did not rise to the level where the Judge could hold him in contempt, and I was told that a bar complaint would be unwise and "not worth it" because the Bar wouldn't
- 2)
- I would like to share an experience I had this last year, although I'm not sure what could really be done to solve the issue. Opposing counsel on one of my cases (still ongoing) has repeatedly acted in ways that made me uncomfortable. The first time I met him, he put his hand on my thigh while talking to me. I have since been careful to avoid physical proximity to him. Then, throughout the case, he would call me, but would not talk to me about case-related issues. Often, calls with this attorney would take 30+ minutes, during which he would talk to me about his personal life (his hobbies, his past career, his vacations, his wine collection, etc.), Although attorneys may go to great lengths to follow the rules for IOLTA accounts, unexpected minor technical problems may arise that require correction even if no client funds are compromised. It would be nice if the BAR took a more helpful approach to resolving minor issues that occur in connection with good faith efforts, rather than sending threatening demand letters or instigating heavy-handed investigations. Just a reminder that in addition to regulation and discipline when justified, the Bar should be providing a helpful service to busy attorneys who are doing their best and who provide the funds to run the office in the first place.

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

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

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

created a backlash.

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

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

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

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

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

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

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

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

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

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

individuals who can't afford legal services.

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

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

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

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

certification for specialty.

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

have no regulation at all.

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

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

Utah State Bar.

TAB 6

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

AUGUST 28, 2020

VIDEO CONFERENCE MEETING

- In Attendance:** President Heather Farnsworth and President-elect Heather Thuet. Commissioners: Rick Hoffman, Marty Moore, Mark Morris, Shawn Newell, Mark Pugsley, Michelle Quist, Tom Seiler, and Katie Woods.
- Ex-Officio Members:** Nate Alder, Herm Olsen, Grace Pusavat, Sarah Baldwin, Camila Moreno, Robert Rice and Dean Elizabeth Kronk Warner.
- Not in Attendance:** John Bradley, Traci Gunderson, Chrystal Mancuso-Smith, and Andrew Morse. Ex-Officio Members: Erik Christiansen, Ashley Peck, Amy Fowler, Raj Dhaliwal, Margaret Plane, and Dean Gordon Smith.
- Also in Attendance:** Executive Director John C. Baldwin, Assistant Executive Director Richard Dibblee, General Counsel Elizabeth A. Wright, and Supreme Court Liaison Larissa Lee.

Minutes: 9:10 a.m. start

1. President's Report: Heather Farnsworth

1.1 Welcome and Introductions.

1.2 Recognize Retiring Commissioner Steve Burt. Heather Farnsworth presented Steve Burt with a plaque and thanked him for 15 years of service as a public member Commissioner.

1.3 Swearing-in New Commissioner Shawn Newell. Chief Justice Durrant joined the meeting to swear in Mr. Newell as the newest public member Commissioner.

1.4 Follow-up on 2021 Summer Convention in Sun Valley. John Baldwin reported that, as requested by the Commission at the July meeting, Sun Valley agreed to increase the room block to 2018 numbers. The contract also allows the Bar to cancel without penalty within 45 days of the convention if COVID circumstances prevent or hinder registration and if the Bar agrees to hold the convention in Sun Valley in 2022. The contract will be finalized this week.

1.5 Follow-up on Fall Forum. Heather Farnsworth reported that the Fall Forum will be a virtual event and that she is extremely optimistic about the value and logistics after attending the National Conference of Bar Presidents virtual meeting.

1.6 Retreat Planning and Discussion of Commission Priorities. Heather Farnsworth asked the Commissioners to review the Bar survey and to propose ideas for Commission focus. She also noted that she is planning a virtual ice-breaker event.

2. Action Items.

2.1 Review Bar Survey, Appoint Committee and Approve Charge. Commissioners discussed that the Bar survey highlighted the lack of diversity among the Bar. The Bar will work with UCLI and Law Related Education to foster diversity by encouraging diverse junior high and high school students to consider a legal career.

2.2 Appoint Committee Chairs. After a discussion of the length of service for some chairs and the need for more frequent turnover and succession planning, **Marty Moore moved to appoint Bar Committee Chairs and Co-chairs for 2020-2021. Heather Thuet seconded the motion which passed unopposed.**

2.3 Approve Committee Charges. Marty moved to approve the Bar Committee Charges for 2020-2021. Mark Morris seconded the motion which passed unopposed.

2.4 Appoint Commission Liaisons. Marty Moore moved and to appoint Commission Liaisons to Bar Committees for 2020-2021. Mark Pugsley seconded the motion which passed unopposed.

2.5 Approve Fee Dispute Resolution Committee Rule Changes. The Fee Dispute Resolution Committee proposed rule changes to allow family law commissioners, retired and senior judges to serve on dispute panels. Currently, only state and federal judges are allowed to serve. The Committee also proposed increasing the jurisdictional amount from \$3,000 to \$10,000 for one lawyer to arbitrate a dispute. Both changes will speed up the time in which disputes can be heard and resolved. Other proposed changes incorporate licensed paralegal practitioners in the rules. **Marty Moore moved to approve the proposed Fee Dispute Committee rule changes. Mark Morris seconded the motion which passed unopposed.**

2.6 Appoint Awards Committee Chairs. Heather Farnsworth moved to appoint Michelle Quist and Katie Woods to co-chair the Awards Committee. Marty Moore seconded the motion which passed unopposed.

2.7 Approve \$500 for Bar Review Activity. Bar Review asked the Commission for \$500 for advertising and prizes for a trivia night to be hosted in conjunction with the Federal Bar Association. Purpose of Bar Review is to host socials that foster collegiality and

networking among bar members. **Marty Moore moved to approve the \$500 for the Bar Review event. Michelle Quist seconded the motion which passed unopposed.**

3. Discussion Items.

- 3.1 Regulatory Reform Report.** The Commission discussed the role of the Bar's Regulatory Reform Committee now that the regulatory reform rules have been approved and the sandbox is operating. Heather Farnsworth will contact Erik Christiansen to discuss the future role of the Committee.
- 3.2 Judicial Nomination Process.** Marty Moore discussed the need for more transparency in the judicial nominating process. Bar members should know the names of the nominees selected by the nominating commissions so they can provide input on the final selection. The Bar will reach out to the Governor's Office and CCJJ to ensure the Bar is on the press release list and can provide the list of nominees to Bar members.
- 3.3 Formalize Term Limits for Committee Chairs.** The Commission discussed the need to foster turnover in Bar Committee leadership and the tension between institutional knowledge and providing leadership opportunities for new people who may have new ideas.

4. Information Items.

- 4.1 ABA Delegates Report on House of Delegates Meeting.** Camila Moreno reported that the ABA YLD passed resolutions in support of paid family leave, protections for employees who are discriminated against for wearing ethnic hairstyles, qualified immunity and other criminal justice issues. Nate Alder reported that the House of Delegates discussed diploma privilege and the future of the ABA. Many state bars have concerns over the perceived political nature of the ABA.
- 4.2 Report on Access to Justice Grant for COVID-19 Legal Assistance.** John Baldwin reported that the Utah Bar Foundation received a \$50,000 grant to provide legal services to low income individuals with COVID related legal problems. The money must be spent before December 31, 2020. The Bar Foundation is funding positions in the Access to Justice Office to provide those legal services.
- 4.3 Solicit Participation on Budget and Finance Committee.** Heather Farnsworth asked Commissioners to suggest names of lawyers with finance backgrounds to serve on the Bar's Budget and Finance Committee. Marty Moore agreed to serve on the Committee in addition to any other lawyers suggested to Heather Farnsworth.
- 4.4 Process to Select 2020-2022 ABA Delegate.** Commissioners reviewed the ABA Delegate selection process in advance of a selection that will be made in October.

Executive Session

Adjourn: 11:40 p.m.

Consent Agenda

1. Approved Minutes from the July 16, 2020 Commission Meeting.

TAB 7

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UTAH STATE BAR
Budget and Finance Committee
Financial Results as of September 30, 2020
and for the three month period then ended

FINANCIAL STATEMENT HIGHLIGHTS

Notable Trends:

- The results of the first quarter of the fiscal year shows total revenues underreporting compared to the budget, while expenses are reporting consistent with the budget.
 - The lower-than-expected revenues are mostly the result of Licensing revenues that have slowed because attorneys were given five months to renew licenses for the 2020/2021 period before late fees are applied, instead of the regular two months. This extension was made due to the COVID pandemic and slowing economy.
 - CLE revenue is also underreporting, which was expected but is still difficult to estimate in a budget due to the current restrictions on large gatherings due to COVID.

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

	Actual	Budget	Fav(unfav) \$ Variance	Fav(unfav) % Variance
YTD revenue	4,455,667	4,834,222	(378,554)	-8%
YTD expenses	1,508,848	1,625,508	116,660	7%
YTD net profit/(loss)	2,946,820	3,208,714	(261,894)	-8%

YTD net income is \$3,208,714 and is \$262,000 under budget.

YTD Net Profit –Cash Basis: Adding back year-to-date depreciation expense of \$38,247 and deducting capital expenditures of \$144,000, the cash basis year-to-date net profit is approximately \$106,000 lower.

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

Licensing: YTD Licensing revenue is \$4,043,000, which is \$234,000 (5%) below budget and approximately \$251,000 less than last year's revenue at this time. As discussed above, the underperformance of revenues is due to the fact that the Licensing renewal period was extended to five months (instead of two) due to the COVID pandemic and slowing economy. Licensing expenses are just slightly higher than budgeted and will even out as the year goes on.

Admissions: YTD Admissions revenue is \$64,000, which is just \$3,500 (5%) below budget and only \$1,000 less than last year's revenue at this time. Admissions expenses are particularly low compared to those budgeted, mostly due to the lower than expected program services expenses. The lower than expected program services will even out in the coming months and is mostly due to the fact that the Bar Exam was not held in July and instead was held the last day of September and first day of October 2020; therefore costs related to that exam won't show up until October financials.

NLTP: YTD NLTP revenues are \$16,000, which is \$10,000 lower than budgeted. The reason for the lower than expected revenues is that the July Bar Exam was postponed until late September/early October and therefore new attorneys won't be admitted and enrolled in NLTP until later than in the calendar year. It is

UTAH STATE BAR
Budget and Finance Committee
Financial Results as of September 30, 2020
and for the three month period then ended

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also noted that expenses were budgeted at \$16,000 and are running \$10,000 over-budget at \$26,000, which we expect to even out as the year goes on.

Fall Forum: Revenue for the 2020 Fall Forum is currently \$11,000 higher than budgeted at \$28,000. This event was originally budgeted to bring in more than \$70,000 for a live, in-person event. Due to COVID, the event was transformed into a virtual, multi-series event, and therefore we do not expect to meet the \$70,000 budgeted, but the virtual event will cut down on costs. As such, we expect the current year event may result in a small profit or at least breakeven, which will occur in later months once all revenues are generated and expenses are reported.

Public Services: Public Services YTD net spending is \$170,000 compared to budgeted net spending of \$153,000. The larger than expected net spending is due to the fact that the grant revenue from the Utah Bar Foundation that was received in August 2020, was reported in the prior fiscal year in accordance with Generally Accepted Accounting Principles (GAAP) following the FY19/20 audit. This decrease in grant revenue will not resolve itself over the year and instead will result in revenues underreporting for the remainder of the year.

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)	\$1,581,302
Capital Replacement Reserve (equipment)	200,000
Capital Replacement Reserve (building)*	<u>520,457</u>
Total	\$2,301,759
Estimated cash reserve at September 30, 2020	<u>\$3,591,850</u>
Excess of current cash reserve over board-designated reserve	<u>\$1,389,065</u>

*During the June 6, 2020 Commission Meeting, the Board approved building improvements to include interior painting and carpet, and repairs to external concrete areas. During July & August 2020, \$129,543 was spent for concrete and painting, thus depleting the \$650,000 reserve to \$520,457, shown above. Carpet expenses are expected in October 2020 and will further deplete the building reserve.

**Utah State Bar
Income Statement
September 30, 2020**

	Actual LYTD	Actual YTD	Budget YTD	Fav (Unfav) variance	% of Budget	Total Budget	YTD % of Tot Budget
Revenue							
Licensing	4,294,650	4,043,278	4,276,786	(233,508)	95%	4,433,431	91%
Admissions	65,550	64,386	67,935	(3,549)	95%	366,920	18%
NLTP	23,700	16,369	25,823	(9,454)	63%	51,920	32%
OPC	1,500	1,303	2,447	(1,144)	53%	28,128	5%
CLE	109,792	110,286	142,648	(32,362)	77%	463,447	24%
Summer Convention	218,930	-	-	-	#DIV/0!	-	#DIV/0!
Fall Forum	17,485	27,375	16,868	10,507	162%	79,903	34%
Spring Convention	(1,210)	-	-	-	#DIV/0!	92,750	0%
Member Services	134,961	139,171	136,257	2,914	102%	239,395	58%
Public Services	2,605	2,920	40,196	(37,276)	7%	12,085	24%
Bar Operations	39,490	29,749	54,226	(24,477)	55%	175,422	17%
Facilities	49,149	10,567	71,036	(60,470)	15%	244,053	4%
Total Revenue	4,956,602	4,445,403	4,834,222	(388,819)	92%	6,187,454	72%
Expenses							
Licensing	34,693	63,118	50,159	(12,960)	126%	130,789	48%
Admissions	212,928	117,673	158,775	41,102	74%	397,785	30%
NLTP	12,790	26,632	15,694	(10,938)	170%	69,087	39%
OPC	381,112	377,025	368,862	(8,163)	102%	1,088,953	35%
CLE	99,309	78,270	109,017	30,748	72%	457,638	17%
Summer Convention	165,477	1,447	8,163	6,717	18%	9,649	15%
Fall Forum	700	1,111	836	(275)	133%	79,903	1%
Spring Convention	4,165	-	188	188	0%	72,019	0%
Member Services	150,895	146,747	139,334	(7,413)	105%	461,881	32%
Public Services	185,172	183,860	192,803	8,943	95%	459,131	40%
Bar Operations	551,167	420,369	435,599	15,230	97%	1,197,952	35%
Facilities	124,338	92,596	146,078	53,482	63%	441,097	21%
Total Expenses	1,922,746	1,508,848	1,625,508	116,660	93%	4,865,883	31%
Net Profit (Loss)	\$ 3,044,121	\$ 2,946,820	\$ 3,208,714	\$ (261,894)	92%	\$ 1,321,571	223%
Depreciation	49,172	38,247	52,756	14,509	72%	161,075	
Cash increase (decrease) from operations	3,093,292	2,985,067	3,261,470	(276,403)	92%	1,482,646	
Changes in operating assets/liabilities	(2,870,447)	(2,870,447)	(2,870,447)	-	100%	20,000	
Capital expenditures	(143,777)	(143,777)	(4,167)	(139,611)	3451%	(157,000)	
Net change in cash	\$ 79,068	\$ (29,157)	\$ 386,856	\$ (416,013)	-8%	\$ 1,345,646	-2%

**Utah State Bar
Licensing
September 30, 2020**

	Actual LYTD	Actual YTD	Budget YTD	Fav (Unfav) variance	% of Budget	Total Budget	YTD % of Tot Budget
Revenue							
4010 · Section/Local Bar Support fees	-	1,048	-	1,048	#DIV/0!	16,914	6%
4004 · Admissions - Laptop Fees	-	575	-	575	#DIV/0!	-	#DIV/0!
4006 · Transfer App Fees	-	850	-	850	#DIV/0!	-	#DIV/0!
4011 · Admissions LPP	200	925	170	755	544%	1,954	47%
4021 · Lic Fees > 3 Years	3,641,535	3,453,140	3,655,351	(202,211)	94%	3,693,872	93%
4020 · NLTP Fees	-	300	-	300	#DIV/0!	-	#DIV/0!
4022 · Lic Fees < 3 Years	187,220	171,900	195,418	(23,518)	88%	199,635	86%
4023 · Lic Fees - House Counsel	41,440	42,275	45,163	(2,888)	94%	47,125	90%
4025 · Pro Hac Vice Fees	31,350	63,150	36,585	26,565	173%	114,946	55%
4024 · Lic Fees LPP	-	1,950	-	1,950	#DIV/0!	800	244%
4026 · Lic Fees - Inactive/FS	122,890	107,860	122,012	(14,152)	88%	119,346	90%
4027 · Lic Fees - Inactive/NS	211,890	191,205	212,357	(21,152)	90%	214,146	89%
4029 · Prior Year Lic Fees	-	-	-	-	#DIV/0!	-	#DIV/0!
4030 · Certs of Good Standing	7,170	4,520	9,081	(4,561)	50%	23,670	19%
4095 · Miscellaneous Income	355	85	649	(564)	13%	1,023	8%
4096 · Late Fees	50,600	3,495	-	3,495	#DIV/0!	-	#DIV/0!
Total Revenue	4,294,650	4,043,278	4,276,786	(233,508)	95%	4,433,431	91%
Expenses							
Program Services	-	18,098	9,126	(8,972)	198%	27,475	-
Salaries & Benefits	25,924	33,719	30,008	(3,711)	112%	70,899	48%
General & Administrative	6,759	8,974	8,790	(184)	102%	25,424	35%
Building Overhead	2,010	2,328	2,235	(93)	104%	6,991	33%
Total Expenses	34,693	63,118	50,159	(12,960)	126%	130,789	48%
Net Profit (Loss)	\$ 4,259,957	\$ 3,980,160	\$ 4,226,628	\$ (246,468)	94%	\$ 4,302,643	93%

Note: Includes LPP staff time and exam expense

**Utah State Bar
Admissions
September 30, 2020**

	Actual LYTD	Actual YTD	Budget YTD	Fav (Unfav) variance	% of Budget	Total Budget	YTD % of Tot Budget
Revenue							
4001 · Admissions - Student Exam Fees	9,350	5,500	9,583	(4,083)	57%	138,957	4%
4002 · Admissions - Attorney Exam Fees	7,775	12,200	7,434	4,766	164%	43,788	28%
4003 · Admissions - Retake Fees	6,950	4,200	4,345	(145)	97%	14,284	29%
4004 · Admissions - Laptop Fees	5,400	4,650	8,852	(4,202)	53%	78,189	6%
4006 · Transfer App Fees	17,350	14,700	21,247	(6,547)	69%	45,983	32%
4008 · Attorney - Motion	11,050	17,850	8,633	9,217	207%	27,226	66%
4009 · House Counsel	5,100	2,550	6,108	(3,558)	42%	13,414	19%
4095 · Miscellaneous Income	575	1,636	67	1,569	2441%	2,580	63%
4096 · Late Fees	-	100	-	100	#DIV/0!	-	#DIV/0!
Total Revenue	65,550	64,386	67,935	(3,549)	95%	366,920	18%
Expenses							
Program Services	54,955	6,400	54,577	48,177	12%	90,765	7%
Salaries & Benefits	87,051	87,111	88,591	1,480	98%	239,422	36%
General & Administrative	65,766	20,034	9,904	(10,130)	202%	50,371	40%
Building Overhead	5,156	4,129	5,703	1,575	72%	17,227	24%
Total Expenses	212,928	117,673	158,775	41,102	74%	397,785	30%
Net Profit (Loss)	\$ (147,378)	\$ (53,288)	\$ (90,840)	\$ 37,553	-41%	\$ (30,865)	173%

**Utah State Bar
NLTP
September 30, 2020**

	Actual LYTD	Actual YTD	Budget YTD	Fav (Unfav) variance	% of Budget	Total Budget	YTD % of Tot Budget
Revenue							
4020 - NLTP Fees	23,700	15,750	25,548	(9,798)	62%	51,096	31%
4081 - CLE - Registrations	-	619	-	619	#DIV/0!	-	#DIV/0!
4200 - Seminar Profit/Loss	-	-	275	(275)	0%	824	-
Total Revenue	23,700	16,369	25,823	(9,454)	63%	51,920	32%
Expenses							
Program Services	356	-	1,037	1,037	0%	5,576	0%
Salaries & Benefits	9,422	20,115	11,537	(8,578)	174%	50,519	40%
General & Administrative	1,878	5,636	1,847	(3,789)	305%	9,190	61%
Building Overhead	1,135	880	1,273	393	69%	3,802	23%
Total Expenses	12,790	26,632	15,694	(10,938)	170%	69,087	39%
Net Profit (Loss)	\$ 10,910	\$ (10,263)	\$ 10,129	\$ (20,392)	-101%	\$ (17,167)	60%

**Utah State Bar
OPC
September 30, 2020**

	Actual LYTD	Actual YTD	Budget YTD	Fav (Unfav) variance	% of Budget	Total Budget	YTD % of Tot Budget
Revenue							
4095 - Miscellaneous Income	1,500	1,303	2,447	(1,144)	53%	5,628	23%
4200 - Seminar Profit/Loss	-	-	-	-	#DIV/0!	22,500	0%
Total Revenue	1,500	1,303	2,447	(1,144)	53%	28,128	5%
Expenses							
Program Services	8,299	531	1,363	832	39%	6,330	8%
Salaries & Benefits	325,443	329,974	320,297	(9,677)	103%	938,389	35%
General & Administrative	29,373	31,216	27,569	(3,647)	113%	84,144	37%
Building Overhead	17,998	15,304	19,633	4,329	78%	60,090	25%
Total Expenses	381,112	377,025	368,862	(8,163)	102%	1,088,953	35%
Net Profit (Loss)	\$ (379,612)	\$ (375,722)	\$ (366,415)	\$ (9,307)	103%	\$ (1,060,825)	35%

**Utah State Bar
CLE
September 30, 2020**

	Actual LYTD	Actual YTD	Budget YTD	Fav (Unfav) variance	% of Budget	Total Budget	YTD % of Tot Budget
Revenue							
4052 · Meeting - Sponsor Revenue	-	-	-	-	#DIV/0!	22,050	0%
4053 · Meeting - Vendor Revenue	1,000	-	-	-	#DIV/0!	-	-
4054 · Meeting - Material Sales	-	-	-	-	#DIV/0!	-	-
4081 · CLE - Registrations	78,352	62,039	126,421	(64,382)	49%	402,087	15%
4082 · CLE - Video Library Sales	46,260	48,247	35,475	12,772	136%	56,905	85%
4084 · Business Law Book Sales	-	-	-	-	#DIV/0!	-	-
4095 · Miscellaneous Income	-	-	-	-	#DIV/0!	-	-
4200 · Seminar Profit/Loss	(15,821)	-	(19,248)	19,248	0%	(17,595)	0%
Total Revenue	109,792	110,286	142,648	(32,362)	77%	463,447	24%
Expenses							
Program Services	50,303	30,823	57,669	26,846	53%	296,854	10%
Salaries & Benefits	33,141	30,861	35,180	4,319	88%	98,288	31%
General & Administrative	12,641	12,895	12,908	13	100%	51,805	25%
Building Overhead	3,225	3,690	3,260	(430)	113%	10,691	35%
Total Expenses	99,309	78,270	109,017	30,748	72%	457,638	17%
Net Profit (Loss)	\$ 10,482	\$ 32,016	\$ 33,631	\$ (1,615)	95%	\$ 5,809	551%

**Utah State Bar
Summer Convention
September 30, 2020**

	Actual LYTD	Actual YTD	Budget YTD	Fav (Unfav) variance	% of Budget	Total Budget	YTD % of Tot Budget
Revenue							
4051 - Meeting - Registration	182,470	-	-	-	#DIV/0!	-	#DIV/0!
4052 - Meeting - Sponsor Revenue	19,500	-	-	-	#DIV/0!	-	#DIV/0!
4053 - Meeting - Vendor Revenue	11,800	-	-	-	#DIV/0!	-	#DIV/0!
4055 - Meeting - Sp Ev Registration	5,160	-	-	-	#DIV/0!	-	#DIV/0!
Total Revenue	218,930	-	-	-	#DIV/0!	-	#DIV/0!
Expenses							
Program Services	131,435	-	5,405	5,405	0%	6,692	0%
Salaries & Benefits	19,630	1,447	2,758	1,312	52%	2,957	49%
General & Administrative	14,412	-	-	-	#DIV/0!	-	#DIV/0!
Building Overhead	-	-	-	-	#DIV/0!	-	-
Total Expenses	165,477	1,447	8,163	6,717	18%	9,649	15%
Net Profit (Loss)	\$ 53,453	\$ (1,447)	\$ (8,163)	\$ 6,717	18%	\$ (9,649)	15%

**Utah State Bar
Fall Forum
September 30, 2020**

	Actual LYTD	Actual YTD	Budget YTD	Fav (Unfav) variance	% of Budget	Total Budget	YTD % of Tot Budget
Revenue							
4051 - Meeting - Registration	14,210	27,375	13,593	13,782	201%	73,178	37%
4052 - Meeting - Sponsor Revenue	-	-	-	-	#DIV/0!	-	-
4053 - Meeting - Vendor Revenue	3,000	-	3,000	(3,000)	0%	4,950	0%
4055 - Meeting - Sp Ev Registration	275	-	275	(275)	0%	1,775	-
Total Revenue	17,485	27,375	16,868	10,507	162%	79,903	34%
Expenses							
Program Services	-	-	-	-	#DIV/0!	68,507	0%
Salaries & Benefits	89	302	89	(213)	339%	4,160	7%
General & Administrative	611	809	747	(62)	108%	7,236	11%
Building Overhead	-	-	-	-	#DIV/0!	-	-
Total Expenses	700	1,111	836	(275)	133%	79,903	1%
Net Profit (Loss)	\$ 16,785	\$ 26,264	\$ 16,032	\$ 10,232	164%	\$ -	#DIV/0!

**Utah State Bar
Spring Convention
September 30, 2020**

	Actual LYTD	Actual YTD	Budget YTD	Fav (Unfav) variance	% of Budget	Total Budget	YTD % of Tot Budget
Revenue							
4051 · Meeting - Registration	(1,210)	-	-	-	#DIV/0!	72,750	0%
4052 · Meeting - Sponsor Revenue	-	-	-	-	#DIV/0!	11,250	0%
4053 · Meeting - Vendor Revenue	-	-	-	-	#DIV/0!	6,750	0%
4055 · Meeting - Sp Ev Registration	-	-	-	-	#DIV/0!	2,000	0%
Total Revenue	(1,210)	-	-	-	#DIV/0!	92,750	0%
Expenses							
Program Services	4,090	-	-	-	#DIV/0!	39,053	0%
Salaries & Benefits	-	-	-	-	#DIV/0!	22,493	0%
General & Administrative	75	-	188	188	0%	10,473	0%
Building Overhead	-	-	-	-	#DIV/0!	-	-
Total Expenses	4,165	-	188	188	0%	72,019	0%
Net Profit (Loss)	\$ (5,375)	\$ -	\$ (188)	\$ 188	0%	\$ 20,731	0%

**Utah State Bar
Member Services
September 30, 2020**

	Actual LYTD	Actual YTD	Budget YTD	Fav (Unfav) variance	% of Budget	Total Budget	YTD % of Tot Budget
Revenue							
4010 - Section/Local Bar Support fees	82,124	77,717	82,132	(4,415)	95%	83,217	93%
4052 - Meeting - Sponsor Revenue	-	-	-	-	#DIV/0!	-	#DIV/0!
4061 - Advertising Revenue	49,614	57,553	50,935	6,618	113%	148,917	39%
4062 - Subscriptions	30	-	20	(20)	0%	40	0%
4071 - Mem Benefits - Lexis	334	300	351	(51)	85%	1,013	-
4072 - Royalty Inc - Bar J, MBNA, LM, M	2,860	3,601	2,819	782	128%	6,208	58%
Total Revenue	134,961	139,171	136,257	2,914	102%	239,395	58%
Expenses							
Program Services	60,348	53,642	56,942	3,300	94%	191,191	28%
Salaries & Benefits	44,180	47,750	43,547	(4,203)	110%	141,722	34%
General & Administrative	41,958	40,786	34,257	(6,529)	119%	114,309	36%
Building Overhead	4,409	4,569	4,588	19	100%	14,659	31%
Total Expenses	150,895	146,747	139,334	(7,413)	105%	461,881	32%
Net Profit (Loss)	\$ (15,933)	\$ (7,576)	\$ (3,077)	\$ (4,499)	246%	\$ (222,486)	3%

**Utah State Bar
Public Services
September 30, 2020**

	Actual LYTD	Actual YTD	Budget YTD	Fav (Unfav) variance	% of Budget	Total Budget	YTD % of Tot Budget
Revenue							
4063 · Modest Means revenue	2,575	2,900	2,839	61	102%	9,479	31%
4093 · Law Day Revenue	-	-	525	(525)	0%	1,575	0%
4095 · Miscellaneous Income	30	20	20	-	100%	27	74%
4120 · Grant Income	3,000	10,265	36,812	(26,547)	28%	36,812	28%
4200 · Seminar Profit/Loss	-	-	-	-	#DIV/0!	1,004	-
Total Revenue	5,605	13,185	40,196	(27,011)	33%	48,897	27%
Expenses							
Program Services	89,932	77,517	91,310	13,793	85%	158,323	49%
Salaries & Benefits	80,336	82,614	86,132	3,518	96%	253,329	33%
General & Administrative	11,557	20,926	11,705	(9,221)	179%	36,314	58%
Building Overhead	3,346	2,803	3,656	853	77%	11,166	25%
Total Expenses	185,172	183,860	192,803	8,943	95%	459,131	40%
Net Profit (Loss)	\$ (179,567)	\$ (170,675)	\$ (152,607)	\$ (18,068)	112%	\$ (410,234)	42%

**Utah State Bar
Bar Operations
September 30, 2020**

	Actual LYTD	Actual YTD	Budget YTD	Fav (Unfav) variance	% of Budget	Total Budget	YTD % of Tot Budget
Revenue							
4060 · E-Filing Revenue	-	15,614	-	15,614	#DIV/0!	33,639	46%
4103 · In - Kind Revenue - UDR	621	23	(2)	25	-1145%	(2)	-1145%
4095 · Miscellaneous Income	233	140	248	(108)	56%	933	15%
4200 · Seminar Profit/Loss	-	-	-	-	#DIV/0!	-	-
Investment Income	38,637	13,972	53,980	(40,008)	26%	140,852	27%
Total Revenue	39,490	29,749	54,226	(24,477)	55%	175,422	23%
Expenses							
Program Services	128,913	5,046	14,060	9,014	36%	48,942	10%
Salaries & Benefits	299,807	324,731	295,818	(28,913)	110%	902,992	36%
General & Administrative	108,130	78,957	111,280	32,323	71%	201,930	39%
In Kind	1,115	517	-	(517)	#DIV/0!	-	#DIV/0!
Building Overhead	13,202	11,118	14,441	3,323	77%	44,088	25%
Total Expenses	551,167	420,369	435,599	15,230	97%	1,197,952	95%
Net Profit (Loss)	\$ (511,677)	\$ (390,620)	\$ (381,373)	\$ (9,247)	102%	\$ (1,022,530)	38%

**Utah State Bar
Facilities
September 30, 2020**

	Actual LYTD	Actual YTD	Budget YTD	Fav (Unfav) variance	% of Budget	Total Budget	YTD % of Tot Budget
Revenue							
4039 - Room Rental-All parties	21,053	3,863	29,965	(26,102)	13%	101,602	4%
4042 - Food & Beverage Rev-All Parties	22,669	1,802	35,882	(34,081)	5%	125,354	1%
4043 - Setup & A/V charges-All parties	-	-	-	-	#DIV/0!	1,351	0%
4090 - Tenant Rent	5,418	4,832	5,274	(442)	92%	15,822	31%
4095 - Miscellaneous Income	9	70	10	60	700%	19	368%
4103 - In - Kind Revenue - UDR	-	-	(95)	95	0%	(95)	0%
Total Revenue	49,149	10,567	71,036	(60,470)	15%	244,148	4%
Expenses							
Program Services	22,354	1,652	34,736	33,084	5%	120,073	1%
Salaries & Benefits	39,000	49,124	37,866	(11,258)	130%	120,941	41%
General & Administrative	7,841	(3,473)	12,738	16,211	-27%	10,741	-32%
In Kind	3,475	95	4,726	4,631	2%	16,950	1%
Building Overhead	51,667	45,198	56,012	10,814	81%	172,392	26%
Total Expenses	124,338	92,596	146,078	53,482	63%	441,097	21%
Net Profit (Loss)	\$ (75,189)	\$ (82,030)	\$ (75,042)	\$ (6,988)	109%	\$ (196,949)	42%

Utah State Bar
Income Statement - Consolidated By Account
September 30, 2020

	Actual LYTD	Actual YTD	Budget YTD	Fav (Unfav) variance	% of Budget	Total Budget	YTD % of Tot Budget
Revenue							
4001 - Admissions - Student Exam Fees	9,350	5,500	9,583	(4,083)	57%	138,957	4%
4002 - Admissions - Attorney Exam Fees	7,775	12,200	7,434	4,766	164%	43,788	28%
4003 - Admissions - Retake Fees	6,950	4,200	4,345	(145)	97%	14,284	29%
4004 - Admissions - Laptop Fees	5,400	5,225	8,852	(3,627)	59%	78,189	7%
4005 - Admissions - Application Forms	2,000	1,000	1,666	(666)	60%	2,499	-
4006 - Transfer App Fees	17,350	15,550	21,247	(5,697)	73%	45,983	34%
4008 - Attorney - Motion	11,050	17,850	8,633	9,217	207%	27,226	66%
4009 - House Counsel	5,100	2,550	6,108	(3,558)	42%	13,414	19%
4010 - Section/Local Bar Support fees	82,124	78,765	82,132	(3,367)	96%	100,131	79%
4011 - Admissions LPP	200	925	170	755	544%	1,954	47%
4012 - Admissions Military Spouse	-	-	-	-	#DIV/0!	-	#DIV/0!
4020 - NLTP Fees	23,700	16,050	25,548	(9,498)	63%	51,096	31%
4021 - Lic Fees > 3 Years	3,641,535	3,453,140	3,655,351	(202,211)	94%	3,693,872	93%
4022 - Lic Fees < 3 Years	187,220	171,900	195,418	(23,518)	88%	199,635	86%
4023 - Lic Fees - House Counsel	41,440	42,275	45,163	(2,888)	94%	47,125	90%
4024 - Lic Fees LPP	-	1,950	-	1,950	#DIV/0!	800	244%
4025 - Pro Hac Vice Fees	31,350	63,150	36,585	26,565	173%	114,946	55%
4026 - Lic Fees - Inactive/FS	122,890	107,860	122,012	(14,152)	88%	119,346	90%
4027 - Lic Fees - Inactive/NS	211,890	191,205	212,357	(21,152)	90%	214,146	89%
4029 - Prior Year Lic Fees	-	-	-	-	#DIV/0!	-	#DIV/0!
4030 - Certs of Good Standing	7,170	4,520	9,081	(4,561)	50%	23,670	19%
4039 - Room Rental-All parties	21,053	3,863	29,965	(26,102)	13%	101,602	4%
4042 - Food & Beverage Rev-All Parties	22,669	1,802	35,882	(34,081)	5%	125,354	1%
4043 - Setup & A/V charges-All parties	-	-	-	-	#DIV/0!	1,351	0%
4051 - Meeting - Registration	195,470	27,375	13,593	13,782	201%	145,928	19%
4052 - Meeting - Sponsor Revenue	19,500	-	-	-	#DIV/0!	33,300	0%
4053 - Meeting - Vendor Revenue	15,800	-	3,000	(3,000)	0%	11,700	0%
4054 - Meeting - Material Sales	-	-	-	-	#DIV/0!	-	-
4055 - Meeting - Sp Ev Registration	5,435	-	275	(275)	0%	3,775	0%
4060 - E-Filing Revenue	-	15,614	-	15,614	#DIV/0!	33,639	46%
4061 - Advertising Revenue	49,614	57,553	50,935	6,618	113%	148,917	39%
4062 - Subscriptions	30	-	20	(20)	0%	40	0%
4063 - Modest Means Revenue	2,575	2,900	2,839	61	102%	9,479	31%
4071 - Mem Benefits - Lexis	334	300	351	(51)	85%	1,013	-
4072 - Royalty Inc - Bar J, MBNA, LM,M	2,860	3,601	2,819	782	128%	6,208	58%
4081 - CLE - Registrations	78,352	62,658	126,421	(63,763)	50%	402,087	16%
4082 - CLE - Video Library Sales	46,260	48,247	35,475	12,772	136%	56,905	85%
4084 - Business Law Book Sales	-	-	-	-	#DIV/0!	-	-
4090 - Tenant Rent	5,418	4,832	5,274	(442)	92%	15,822	31%
4093 - Law Day Revenue	-	-	525	(525)	0%	1,575	0%
4095 - Miscellaneous Income	2,701	3,254	3,441	(187)	95%	10,210	32%
4096 - Late Fees	50,600	3,595	-	3,595	#DIV/0!	-	#DIV/0!
4103 - In - Kind Revenue - UDR	621	23	(97)	120	-24%	(97)	-24%
4200 - Seminar Profit/Loss	(15,821)	-	(18,973)	18,973	0%	6,733	0%
Investment income	38,637	13,972	53,980	(40,008)	26%	140,852	10%
Total Revenue	4,956,602	4,445,403	4,797,410	(352,007)	93%	6,187,454	72%
Program Service Expenses							
5001 - Meeting Facility-external only	69,776	-	15,473	15,473	0%	24,886	0%
5002 - Meeting facility-internal only	13,888	3,768	18,734	14,966	20%	59,564	6%
5013 - ExamSoft	12,983	-	12,983	12,983	0%	19,110	0%
5014 - Questions	26,102	17,588	35,228	17,641	50%	63,376	28%
5015 - Investigations	150	351	210	(141)	167%	577	61%
5016 - Credit Checks	232	305	261	(44)	117%	1,098	28%
5017 - Medical Exam	-	-	-	-	#DIV/0!	320	-
5020 - Exam Scoring	-	-	-	-	#DIV/0!	-	-
5025 - Temp Labor/Proctors	3,100	-	3,100	3,100	0%	6,100	0%
5030 - Speaker Fees & Expenses	4,201	6,500	6,272	(228)	104%	15,548	42%
5031 - Speaker Reimb.- Receipt Req'd	1,465	-	1,334	1,334	0%	18,713	0%
5035 - Awards	801	2,279	896	(1,383)	254%	5,491	42%
5037 - Grants/ contributions - general	3,000	-	3,000	3,000	0%	12,670	0%
5040 - Witness & Hearing Expense	392	(45)	1,004	1,049	-4%	4,324	-1%
5041 - Process Serving	202	158	192	34	82%	619	26%
5046 - Court Reporting	-	1,111	-	(1,111)	#DIV/0!	-	#DIV/0!
5047 - Casemaker	10,458	13,237	11,006	(2,231)	120%	38,504	34%
5055 - Legislative Expense	12,000	15,000	10,792	(4,208)	139%	37,517	40%
5060 - Program Special Activities	2,595	-	2,595	2,595	0%	2,595	-
5061 - LRE - Bar Support	65,000	60,000	60,000	-	100%	60,000	100%
5062 - Law Day	-	-	-	-	#DIV/0!	3,500	0%
5063 - Special Event Expense	20,302	-	8,017	8,017	0%	23,422	0%
5064 - MCLE Fees Paid	3,541	4,322	3,999	(323)	108%	17,766	24%
5070 - Equipment Rental	32,730	-	1,794	1,794	0%	37,565	0%
5075 - Food & Bev-external costs only	40,760	2,514	62,587	60,073	4%	340,429	1%
5076 - Food & beverage - internal only	15,500	1,891	21,532	19,641	9%	58,065	3%
5079 - Soft Drinks	1,958	741	2,388	1,647	31%	7,606	10%
5085 - Misc. Program Expense	6,196	1,105	1,976	871	56%	5,917	19%
5090 - Commission Expense	4,694	5,535	5,234	(301)	106%	28,731	19%
5095 - Wills for Heroes	149	-	367	367	0%	1,106	0%
5096 - UDR Support	-	-	-	-	#DIV/0!	-	-
5099 - Blomquist Hale	18,432	18,432	18,437	5	100%	55,303	33%
5702 - Travel - Lodging	11,824	-	-	-	#DIV/0!	31,670	0%
5703 - Travel - Transportation/Parking	6,056	-	-	-	#DIV/0!	4,539	0%
5704 - Travel - Mileage Reimbursement	2,134	-	-	-	#DIV/0!	2,425	0%
5705 - Travel - Per Diems	1,621	-	290	290	0%	590	0%
5706 - Travel - Meals	-	-	-	-	#DIV/0!	-	#DIV/0!
5707 - Travel - Commission Mtgs	11,986	-	2,090	2,090	0%	2,500	0%
5805 - ABA Annual Meeting	10,700	-	-	-	#DIV/0!	-	#DIV/0!
5810 - ABA Mid Year Meeting	-	-	-	-	#DIV/0!	-	#DIV/0!
5815 - Commission/Education	12,750	-	1,984	1,984	0%	2,350	0%
5820 - ABA Annual Delegate	4,818	-	-	-	#DIV/0!	-	#DIV/0!
5830 - Western States Bar Conference	-	-	-	-	#DIV/0!	-	#DIV/0!
5840 - President's Expense	7,797	4,663	5,530	867	84%	14,791	32%
5841 - President's Reimbursement	2,899	-	3,532	3,532	0%	3,532	0%
5845 - Reg Reform Task Force	4,477	-	-	-	#DIV/0!	-	-

Utah State Bar
Income Statement - Consolidated By Account
September 30, 2020

	Actual LYTD	Actual YTD	Budget YTD	Fav (Unfav) variance	% of Budget	Total Budget	YTD % of Tot Budget
5850 - Leadership Academy	-	-	-	-	#DIV/0!	10,000	0%
5855 - Bar Review	-	-	-	-	#DIV/0!	-	#DIV/0!
5865 - Retreat	20,089	-	5,000	5,000	0%	5,000	0%
5866 - Wellbeing Committee	12,600	17,167	12,389	(4,778)	139%	41,590	41%
5867 - Bar Membership Survey	-	-	-	-	#DIV/0!	-	#DIV/0!
5868 - UCLI Support	50,000	-	-	-	#DIV/0!	-	#DIV/0!
5960 - Overhead Allocation - Seminars	-	-	(29,134)	(29,134)	0%	(36,176)	0%
5970 - Event Revenue Sharing - 3rd Pty	20,631	17,087	15,133	(1,954)	113%	26,548	64%
Total Program Service Expenses	550,985	193,708	326,225	132,517	59%	1,059,781	18%
Salaries & Benefit Expenses							
5510 - Salaries/Wages	757,306	803,233	735,121	(68,112)	109%	2,205,507	36%
5605 - Payroll Taxes	56,591	56,675	55,198	(1,477)	103%	165,874	34%
5610 - Health Insurance	65,359	69,887	73,375	3,488	95%	216,410	32%
5620 - Health Ins/Medical Reimb	975	1,500	1,256	(244)	119%	4,100	37%
5630 - Dental Insurance	3,855	3,322	4,521	1,198	73%	13,070	25%
5640 - Life & LTD Insurance	4,419	4,747	4,851	104	98%	14,785	32%
5645 - Workman's Comp Insurance	645	812	553	(259)	147%	1,637	50%
5650 - Retirement Plan Contributions	64,464	66,414	68,884	2,470	96%	199,181	33%
5655 - Retirement Plan Fees & Costs	-	-	349	349	0%	10,442	0%
5660 - Training/Development	10,410	1,158	7,715	6,557	15%	15,105	8%
Total Salaries & Benefit Expenses	964,024	1,007,747	951,823	(55,925)	106%	2,846,111	34%
General & Administrative Expenses							
7025 - Office Supplies	5,902	3,661	5,308	1,647	69%	19,064	19%
7015 - Office Equip Repairs	-	400	-	(400)	#DIV/0!	-	#DIV/0!
7033 - Operating Meeting Supplies	5,697	131	7,206	7,075	2%	20,174	1%
7035 - Postage/Mailing, net	27,241	15,486	29,503	14,017	52%	40,025	39%
7040 - Copy/Printing Expense	28,133	29,563	26,838	(2,725)	110%	128,288	23%
7041 - Copy/Print revenue	(3,293)	(2,840)	(5,349)	(2,509)	53%	(20,027)	14%
7045 - Internet Service	1,883	5,299	3,099	(2,200)	171%	9,513	56%
7050 - Computer Maintenance	9,904	10,798	10,883	85	99%	42,762	25%
7055 - Computer Supplies & Small Equip	2,217	5,225	2,601	(2,624)	201%	14,542	36%
7089 - Membership Database Fees	4,000	12,000	-	(12,000)	#DIV/0!	25,357	47%
7100 - Telephone	9,444	21,060	9,628	(11,432)	219%	41,871	50%
7105 - Advertising	10,885	2,598	431	(2,167)	602%	5,132	51%
7106 - Public Notification	-	277	-	(277)	#DIV/0!	-	#DIV/0!
7107 - Production Costs	-	-	-	-	#DIV/0!	83	0%
7110 - Publications/Subscriptions	7,891	8,844	6,957	(1,887)	127%	17,949	49%
7115 - Public Relations	-	-	-	-	#DIV/0!	-	#DIV/0!
7120 - Membership/Dues	9,039	8,960	8,805	(155)	102%	10,370	86%
7135 - Bank Service Charges	407	477	506	29	94%	854	56%
7136 - ILM Service Charges	4,621	4,343	4,618	275	94%	14,237	31%
7138 - Bad debt expense	-	-	-	-	#DIV/0!	-	-
7140 - Credit Card Merchant Fees	29,953	25,068	27,610	2,542	91%	47,034	53%
7141 - Credit Card surcharge	(19,276)	(17,333)	(19,640)	(2,307)	88%	(20,336)	85%
7145 - Commission Election Expense	-	-	-	-	#DIV/0!	2,699	0%
7150 - E&O/Off & Dir Insurance	12,988	13,453	12,960	(493)	104%	38,880	35%
7160 - Audit Expense	32,705	32,635	32,705	70	100%	34,265	95%
7170 - Lobbying Rebates	119	-	176	176	0%	195	0%
7175 - O/S Consultants	90,669	33,619	51,918	18,299	65%	96,267	35%
7176 - Bar Litigation	9,389	-	6,159	6,159	0%	6,227	0%
7177 - UPL	15,422	1,564	3,749	2,185	42%	7,402	21%
7178 - Offsite Storage/Backup	1,094	-	-	-	#DIV/0!	-	#DIV/0!
7179 - Payroll Adm Fees	748	757	744	(13)	102%	2,418	31%
7180 - Administrative Fee Expense	241	288	229	(59)	126%	787	37%
7190 - Lease Interest Expense	-	-	-	-	#DIV/0!	-	#DIV/0!
7191 - Lease Sales Tax Expense	-	-	-	-	#DIV/0!	-	#DIV/0!
7195 - Other Gen & Adm Expense	2,977	426	4,289	3,863	10%	15,930	3%
Total General & Administrative Expenses	300,999	216,761	231,934	15,173	93%	601,937	50%
In Kind Expenses							
7103 - InKind Contrib-UDR & all other	4,590	612	4,726	4,114	13%	16,950	4%
Total In Kind Expenses	4,590	612	4,726	4,114	13%	16,950	27%
Building Overhead Expenses							
6015 - Janitorial Expense	8,039	3,063	9,832	6,769	31%	27,887	11%
6020 - Heat	2,054	1,811	2,208	397	82%	15,834	11%
6025 - Electricity	14,729	13,758	16,655	2,897	83%	37,917	36%
6030 - Water/Sewer	3,868	2,275	4,019	1,744	57%	6,545	35%
6035 - Outside Maintenance	1,354	1,714	1,394	(320)	123%	13,691	13%
6040 - Building Repairs	3,750	8,063	4,711	(3,352)	171%	15,508	52%
6045 - Bldg Mtnc Contracts	8,053	7,360	8,049	689	91%	26,409	28%
6050 - Bldg Mtnc Supplies	-	-	224	224	0%	619	0%
6055 - Real Property Taxes	6,464	8,645	6,189	(2,456)	140%	21,355	40%
6060 - Personal Property Taxes	105	100	111	11	91%	333	30%
6065 - Bldg Insurance/Fees	4,560	4,983	4,653	(330)	107%	13,933	36%
6070 - Building & Improvements Depr	13,503	14,767	13,908	(859)	106%	41,678	35%
6075 - Furniture & Fixtures Depr	2,152	766	2,490	1,724	31%	7,746	10%
7065 - Computers, Equip & Sftwre Depr	33,516	22,715	36,358	13,643	62%	111,651	20%
Total Building Overhead Expenses	102,148	90,019	110,801	20,781	81%	341,106	30%
Other							
4300 - Gain (Loss) - Disposal Of Assets	-	-	-	-	#DIV/0!	-	#DIV/0!
4120 - Grant Income	3,000	10,265	(36,812)	(47,077)	-28%	(36,812)	-28%
	3,000	10,265	(36,812)	(47,077)	-28%	(36,812)	-28%
Total Expenses	1,919,746	1,498,583	1,662,320	163,737	90%	4,902,695	39%
Net Profit (Loss)	\$ 3,036,856	\$ 2,946,820	\$ 3,135,090	\$ (188,270)	94%	\$ 1,284,759	\$ 0

Utah State Bar Balance Sheets

	9/30/2020	6/30/2020
ASSETS		
Current Assets		
Petty Cash	\$ 625	\$ 625
Cash in Bank	420,381	789,463
Invested Funds	7,198,359	6,089,850
Total Cash/Investments	7,619,365	6,879,938
Accounts Receivable	68,037	227,851
Prepaid Expenses	185,968	94,743
A/R - Sections	50,549	49,679
Total Other Current Assets	304,555	372,273
Total Current Assets	7,923,919	7,252,211
Fixed Assets		
Property & Equipment	4,787,588	4,643,811
Accumulated Depreciation	(4,067,913)	(4,029,666)
Land	633,142	633,142
Total Fixed Assets	1,352,816	1,247,286
TOTAL ASSETS	\$ 9,276,736	\$ 8,499,498
LIABILITIES & EQUITY		
Liabilities		
Current Liabilities		
AP Trade	\$ 54,786	\$ 104,237
Other Accounts Payable	178,088	109,826
Accrued Payables	566,783	481,137
Cap Lease Oblig - ST	3,892	3,892
A/P - Sections	-	173,165
Deferred Revenue	19,731	2,158,156
Total Current Liabilities	823,280	3,030,412
Long Term Liabilities		
Capital Lease Oblig	3,049	4,112
Total Long Term Liabilities	3,049	4,112
Total Liabilities	826,329	3,034,524
Equity		
Unrestricted Net Assets (R/E)	5,503,712	5,853,847
Fund Balance - Current Year	2,946,695	(388,874)
Total Equity	8,450,407	5,464,974
TOTAL LIABILITIES & EQUITY	\$ 9,276,736	\$ 8,499,498

UTAH STATE BAR
Membership Statistics
September 30, 2020

<u>STATUS</u>	<u>09/30/19</u>	<u>09/30/20</u>	<u>Change</u>
Active	8,573	8,150	(423)
Active under 3 years	680	701	21
Active Emeritus	244	251	7
In House Counsel	98	102	4
Foreign Legal Counsel	3	1	(2)
LPP	-	3	3
Military Spouse	-	1	1
Subtotal - Active	9,598	9,209	(389)
Inactive - Full Service	808	723	(85)
Inactive - No Service	1,994	1,779	(215)
Inactive Emeritus	327	214	(113)
Inactive House Counsel	6	10	4
Inactive LPP	-	-	-
Subtotal - Inactive	3,135	2,726	(409)
Total Active and Inactive	12,733	11,935	(798)
<u>Supplemental Information</u>			
Paralegals	165	151	(14)
Associate Section Members	119	119	-
Journal Subscribers	125	125	-
<u>Active Attorneys by Region</u>			
1st Division (Logan - Brigham)	180	177	(3)
2nd Division (Davis - Weber)	898	852	(46)
3rd Division (Salt Lake)	5,502	5,269	(233)
4th Division (Utah)	1,238	1,181	(57)
5th Division (Southern Utah)	491	479	(12)
Out of State	1,289	1,251	(38)
Total Active Attorneys	9,598	9,209	(389)

*Due to COVID, license fee due date was extended to 10/31/20 which accounts for lower than avg number

**INSTITUTIONAL LIQUIDITY
MANAGEMENT**
ILM-UT ST BAR (3176)

Dated: 10/07/2020

Balance Sheet Classification

Base Currency: USD As of 09/30/2020

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
38141W232	GOLDMAN:FS MM INST	4,425,323.55	AAA	0.080	09/30/2020	0.100	0.100	4,430,369.67	-620.80	1.0010	0.00	4,429,748.87
CCYUSD	Cash	254.18	AAA	0.000	09/30/2020	0.000	0.000	254.18	0.00	1.0000	0.00	254.18
---	---	4,425,577.73	AAA	---	09/30/2020	0.100	0.100	4,430,623.85	-620.80	---	0.00	4,430,003.05

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
6325C0BY6	NATIONAL AUSTRALIA BANK LTD	200,000.00	AA-	4.375	12/10/2020	1.930	1.227	200,826.21	289.19	100.6077	2,698.53	203,913.93
74258LAS8	PRINCIPAL LIFE GLOBAL FUNDING II	225,000.00	A+	2.625	11/19/2020	1.954	0.419	225,188.95	474.93	100.2995	2,165.63	227,839.50
136069XY2	CANADIAN IMPERIAL BANK OF COMMERCE	187,000.00	AA	2.700	02/02/2021	1.876	0.477	187,514.52	880.97	100.7516	827.48	188,232.97
89236TEU5	TOYOTA MOTOR CREDIT CORP	250,000.00	A+	2.950	04/13/2021	1.619	0.532	251,767.77	1,473.48	101.2825	3,441.87	256,672.82
69371RP26	PACCAR FINANCIAL CORP	50,000.00	A+	3.100	05/10/2021	1.908	0.264	50,358.81	508.24	101.7301	607.08	51,472.13
74153WCH0	PRICOA GLOBAL FUNDING I	200,000.00	AA-	2.200	06/03/2021	2.480	0.241	199,856.00	2,984.00	101.3200	1,442.22	204,082.22
22532LAR5	CREDIT AGRICOLE SA (LONDON BRANCH)	250,000.00	AA-	2.375	07/01/2021	1.970	0.536	250,749.15	2,898.35	101.3790	1,484.38	254,931.88
89114Q3V8	TORONTO-DOMINION BANK	250,000.00	AA-	0.568	07/30/2021	1.468	0.406	248,149.50	2,187.50	100.1348	240.72	250,577.72
55217GBX6	METROPOLITAN LIFE GLOBAL FUNDING I	316,000.00	AA-	1.950	09/15/2021	1.936	0.276	316,041.52	5,016.37	101.6008	273.87	321,331.76
---	---	1,928,000.00	AA-	---	05/02/2021	1.888	0.491	1,930,352.44	16,521.02	---	13,181.56	1,960,055.03

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
525ESC1Y5	LEHMAN ESCROW	300,000.00	NA	0.000	01/01/2049	0.000	---	0.00	3,450.00	1.1500	0.00	3,450.00
22548QAR8	CREDIT SUISSE AG (NEW YORK BRANCH)	337,000.00	A+	3.000	10/28/2021	2.008	0.331	340,548.98	6,143.50	102.8781	4,268.67	350,961.12
69371RP75	PACCAR FINANCIAL CORP	188,000.00	A+	2.850	03/01/2022	2.022	0.330	188,141.20	4,490.45	103.5854	441.75	193,073.39
46849LTE1	JACKSON NATIONAL LIFE GLOBAL FUNDING	250,000.00	A	3.300	02/01/2022	1.516	0.481	255,888.70	3,572.30	103.7764	1,375.00	260,816.00
---	---	1,073,000.00	A+	---	02/08/2022	1.850	0.373	784,558.85	17,556.25	---	6,085.42	808,300.52

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
---	---	7,426,577.73	AA+	---	01/22/2021	0.778	0.237	7,145,535.14	33,556.47	---	19,265.98	7,168,358.59

* 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

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LEGAL EDUCATION

How are things working out for 3 Utah law grads seeking diploma privilege?

BY STEPHANIE FRANCIS WARD ([HTTPS://WWW.ABAJOURNAL.COM/AUTHORS/20/](https://www.abajournal.com/authors/20/))

SEPTEMBER 1, 2020, 9:08 AM CDT

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Prior to this summer, Chase Wilde didn't know how to file a court appearance. Thanks to the supervised practice requirement in the Utah Supreme Court's temporary order for diploma privilege, he does now.

"For a seasoned attorney that seems so simple, but I had no idea what that was or what it was supposed to look like," says Wilde, a 2020 graduate of the University of Utah S.J. Quinney College of Law.

Image from Shutterstock.com.

The Utah Supreme Court in April announced it would be allowing diploma privilege due to the coronavirus pandemic. Besides completing 360 hours of supervised practice, the temporary order

(https://www.abajournal.com/files/Signed_2020.04.21_Bar_Waiver_Order_.pdf) requires that candidates graduate from ABA-accredited law schools with first-time bar passage rates of at least 86% and have not previously sat for a bar exam.

According to Joni Dickson Seko, deputy general counsel at the Utah State Bar, 177 candidates have applied for diploma privilege. Twenty-one candidates were approved for August admission, and 42 more are eligible for September admission. Candidates have until December 31 to complete the 360 hours, according to the order.

Wilde finished his hours requirement Aug. 4 and is scheduled to be admitted to the Utah bar in September. His hours included paid work at Kirton McConkie, the Salt Lake City law firm where he clerked, and 101 hours of pro bono representation. His pro bono clients included a single mother who won custody of her children and child support through a default judgement, and defendants in landlord-tenant cases who faced judgements for unpaid rent.

Now clerking for the Utah Court of Appeals, Wilde thinks the legal work was much more practical than anything he did in law school.

“Some of these people didn’t have jobs, one of them was living in their car. Some things we talked about were maybe they should file for bankruptcy or if they were judgment proof,” he adds.

Supreme courts in Washington

(<http://www.courts.wa.gov/content/publicUpload/Supreme%20Court%20Orders/Order%20Granting%20Diploma%20Privilege%20061220.pdf>), **Oregon**

(https://www.osbar.org/_docs/resources/SCO20-012Order2020BarExam.pdf) and **Louisiana**

(https://www.lasc.org/COVID19/Orders/2020-07-22_LASC_BarExam.all.pdf) also published temporary orders granting diploma privilege, with various considerations, and **Wisconsin** (<https://www.abajournal.com/web/article/bar-exam-does-little-to-ensure-attorney-competence-say-lawyers-in-diploma-privilege-state>) has a long-

standing rule that allows diploma privilege for in-state graduates. However, Utah is the only jurisdiction that requires supervised practice to earn diploma privilege.

Cambre Roberts, a 2020 University of Utah law school graduate, now has a job with the Metropolitan Public Defender in Portland, Oregon. She's seeking Oregon bar admission through diploma privilege and expects to be admitted to practice in early October.

"Once I found out Oregon was going to do diploma privilege, it felt like a weight was taken off my shoulders. There was a lot of stress and anxiety around not only taking the exam but also the additional concerns with COVID-19. I have asthma," says Roberts.

Nevertheless, she thought about taking a bar exam, even though she's not in a jurisdiction that requires bar passage to practice this year. Utah plans to have a bar exam in September, and Oregon has a remote exam scheduled for October, according to the National Conference of Bar Examiners' website

(<https://www.ncbex.org/ncbe-covid-19-updates/july-2020-bar-exam-jurisdiction-information/#Oregon>).

"I was worried about the stigma attached to not taking a bar exam," Roberts says. "It just means I have to prove myself as an attorney, which I was going to have to do anyway."

Rachel Mabey Whipple, a 2020 Brigham Young University J. Reuben Clark Law School graduate, finished her hours requirement July 2 and was virtually sworn in to practice law Aug. 10. The time came from a paid clerking job with Seiler, Anderson, Fife & Marshall, a Provo, Utah, law firm where she is now a first-year associate, and pro bono work. Her assignments included representation for people who experienced domestic violence.

Whipple is married to a BYU biology professor, and they have three children, ages 20, 18 and 12. Besides her JD, she has a master's degree in comparative studies with an emphasis in environmental humanities. She's done a significant amount of volunteer work, including serving on the PTA at her children's school



Chase Wilde, a 2020 graduate of the University of Utah S.J. Quinney College of Law.

and holding board positions with the Utah chapter of the Nature Conservancy and LDS Earth Stewardship, a Church of Jesus Christ of Latter-day Saints organization.

However, practicing law is Whipple's first career outside the home.

"Being a stay-at-home mom is in many ways a very privileged thing to do, but it's also a very vulnerable position to be in. I know now how vulnerable a person can be when their entire financial stability is [dependent] on another person who may or may not be up to that responsibility or treating them well," says Whipple.

She's grateful Utah has diploma privilege because she doesn't have to worry about when the bar exam will take place. Whipple mentions Florida, where the state supreme court announced Aug. 16

(<https://www.floridabarexam.org/static/20200816PressRelease.pdf>) that its online bar exam, scheduled to start Aug. 19, would be postponed due to technical issues.

Wilde agrees. His wife is a mental health care therapist who has been consulting with clients via telephone during the pandemic. He's not sure when—or where—he would have studied for the bar exam because the couple lives in a small one-bedroom apartment.

"For many weeks, I couldn't have even gone to the school, libraries or even public parks to study as they were all closed because of COVID," says Wilde, who likes the idea of Utah making diploma privilege for bar admissions permanent.

"If there's not a huge influx of bar complaints against us, and the numbers show that the bar exam may be a little outdated and may not be the best way to show competency, then, yes, I think it would be awesome," he says.

See also:

ABAJournal.com (<https://www.abajournal.com/news/article/utah-first-state-to-grant-diploma-privilege-during-the-coronavirus-pandemic>): "Utah is first state to grant diploma privilege during novel coronavirus pandemic"

ABAJournal.com (<https://www.abajournal.com/web/article/bar-exam-does-little-to-ensure-attorney-competence-say-lawyers-in-diploma-privilege-state>): "Bar exam does little to ensure attorney competence, say lawyers in diploma privilege state"



By:

SoloSuit, Utah Startup to Help Debtors, Goes National

SoloSuit

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Closing the justice gap

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By Bob Ambrogi on September 16, 2020

SoloSuit, the Utah-based legal startup that helps consumers respond to debt collection lawsuits, and that originally emerged from **LawX**, the legal design lab at **BYU Law School**, is going national.

George Simons, who helped develop SoloSuit as a BYU Law student and is now the company's owner and CEO, announced the expansion yesterday during a presentation as part of the **Startup Battlefield** pitch competition during the TechCrunch **Disrupt 2020** virtual conference, where the company is competing for a prize of \$100,000.



George Simons

The problem SoloSuit addresses is huge. Every year, some 10 million people are sued for debt, but 90% lose by default because they do not respond, often because they cannot figure out how, according to the Consumer Financial Protection Bureau.

While nearly all debt-collection plaintiffs are represented by counsel, fewer than 10% of defendants are.

SoloSuit's free software walks a defendant through a series of prompts that prepares a response to the lawsuit. It also instructs the defendant on how to print and file the response.

While this basic service is free, a defendant can pay SoloSuit \$15 to handle the printing and filing directly. This is important, Simons told me yesterday, because many debt defendants do not have access to a computer printer and still others do not have easy access to a post office.

For an additional fee of \$115, SoloSuit will have an attorney review the document before it is filed, to ensure everything is in order.

In November 2017, I was fortunate to have the opportunity to sit in on the inaugural LawX class at BYU as it was still in the process of designing SoloSuit. In January 2018,

BYU Law **announced the release** of SoloSuit, which was initially designed to help debt defendants solely in Utah.

But the problem it tackled is nationwide, Simons said, and he realized that people from all over the country were coming to the site and using the app, even though it carried a warning that it was for Utah cases only.

As Simons explored expansion into other states, he initially thought he would need to create a separate workflow for each state, to accommodate differences in state laws and procedures. But Simons says he was able to develop a single, simplified workflow that creates a response that works in every state.

Eventually, he said, he hopes to release a version that is more specifically tailored to each state.

Simons views SoloSuit as a technology that is helping to close the justice gap in the United States. And believes the need for the product will be even greater in the wake of the pandemic, because more than half of all debt collection lawsuits are for medical expenses.

He also sees the opportunity for SoloSuit to be successful as a for-profit startup serving a problem of access to justice. The company's "freemium" model enables anyone to access the platform for free, or pay a small amount for the additional services it offers.

"We trying to close the justice gap," Simons said, "making legal services accessible as a for-profit tech startup."

UNITED STATES DISTRICT COURT
WESTERN DISTRICT OF MICHIGAN
SOUTHERN DIVISION

LUCILLE S. TAYLOR,

Plaintiff,

CASE NO. 1:19-CV-670

v.

HON. ROBERT J. JONKER

DENNIS M. BARNES, et al.,

Defendants.

ORDER

This is an action asserting First Amendment challenges to the structure of the Michigan State Bar. Plaintiff is a member of the Michigan Bar who asserts that the mandatory dues assessment violates her free speech rights, and that required membership as a condition to practice law violates her free association rights in light of the Supreme Court's decision in *Janus v. American Federation*, 138 S. Ct. 2448 (2018). Defendant officers of the Michigan Bar disagree and assert that nothing in *Janus* abrogates earlier Supreme Court decisions expressly validating a compulsory (or integrated) model for organization of a State Bar.

The parties have agreed on a Statement of Facts, ECF No. 16, and have each filed a Motion for Summary Judgment. ECF Nos. 17, 19. The parties have done an excellent job on their submissions, and it would be most interesting to wade into the issues with the parties. But the Court is satisfied that whatever wading needs to be done must happen in a higher Court because the Supreme Court has squarely decided the issues framed here in favor of the defendants. In *Lathrop v. Donohue*, 367 U.S. 820 (1961), the Supreme Court rejected a free association claim by a member of the Wisconsin Bar on materially indistinguishable facts. In *Keller v. State Bar of California*, 496

U.S. 1 (1990), the Supreme Court rejected a free speech claim by a member of the California Bar on materially indistinguishable facts.

Plaintiff accepts that *Lathrop* and *Keller* rejected the claims she is making here, but urges this Court to revisit them in light of a line of Supreme Court authority culminating in *Janus* that, according to Plaintiff, calls into question the continuing validity of the holdings. This Court has no power to do that. *Ramos v. Louisiana*, 140 S. Ct. 1390, 1416 n.5 (2020) (Justice Kavanaugh, concurring in part); *Hohn v. United States*, 524 U.S. 236, 252-53 (1998). *See also Thompson v. Marietta Education Association*, ___ F.3d ___, 2020 WL 5015460 (6th Cir. Aug. 25, 2020) (refusing to extend *Janus* in a case “controlled by a fair reading of the Supreme Court’s precedents” because “lower courts must follow Supreme Court precedent”). Even Justices who may believe *Lathrop* and *Keller* were wrongly decided recognize that the Supreme Court will have to make that call. *See, e.g., Jarchow v. State Bar of Wisconsin*, 140 S. Ct. 1720 (June 1, 2020) (mem.) (Justices Thomas and Gorsuch dissenting from denial of certiorari in an integrated bar case).

Accordingly, following and applying *Lathrop* and *Keller*, as this Court is bound to do, the Court **GRANTS** the Defendants’ Motion for Summary Judgment, and **DENIES** the Plaintiff’s Motion for Summary Judgment. Judgment will enter in favor of Defendants and against Plaintiff.

IT IS SO ORDERED.

Date: September 8, 2020

/s/ Robert J. Jonker
ROBERT J. JONKER
CHIEF UNITED STATES DISTRICT JUDGE

50°

TOP STORIES

Salt Lake County assists 154 people on Remote Expungement Day



by: [Lindsey Peterson](#)

Posted: Sep 25, 2020 / 03:29 PM MDT / Updated: Sep 25, 2020 / 04:09 PM MDT

SALT LAKE CITY, Utah (ABC4 News) – Over 50 volunteer attorneys took part in Salt Lake County's virtual expungement day to provide free legal assistance to community members with criminal records.

The Salt Lake County Mayor's Office of Criminal Justice Initiatives partnered with the Salt Lake County District Attorney's Office, Salt Lake City Justice Court, 3rd District Court, and the Utah State Bar, to host the online event.

Participating courts held remote 'courtrooms' to hear expungement related motions. Prosecutors from the Salt Lake County District Attorney's Office also donated their time so that motions that required the participation of prosecutors could be heard.

A second chance at life: Hundreds seek to clear criminal record on Expungement Day →

During the half day remote expungement day, 154 community members were assisted.

According to Salt Lake County, one in five people in the United States has a criminal record. Data from the Utah Department of Public Safety suggests that in Utah it could even be as high as one in four persons.

Having a criminal record creates barriers for people when it comes to housing access, employment, and educational opportunities. The county says that when people cannot find places to live and a decent paying job, the chance for recidivism, homelessness, and relapse increases, ultimately increasing costs to taxpayers.

"Our whole notion of the criminal justice system is premised on the notion of rehabilitation. On the premise that when you pay your debt to society, we welcome you back into our community to be an equal partner and an equal contributor to the success of our society. Expungement Day is us delivering on that promise," said Salt Lake County DA Sim Gill.

Bill passed by legislature offers low-level offenders a second chance →

50° The Expungement Program was launched in April 2019 with the assistance of a federal grant for the Mayor's Office of Criminal Justice Initiatives. The program has since helped 2,000 people navigate the lengthy, complicated, and costly expungement process. The program has successfully expunged over 750 eligible cases.

Prior to the pandemic, the program would normally hold events that drew hundreds of people seeking help.

"While this COVID period has been a time of disruption, it also has been a time of incredible innovation. Our new model of remote expungement events is just one example," said Salt Lake County Mayor Jenny Wilson.

Expungement is a legal process set forth in Utah law. It defines who is, and who is not eligible to clear their court records. Applications for expungement are first submitted to the Department of Public Safety to confirm eligibility. Petitions for expungement are then submitted to the court, which makes the final decision on if the applicant can expunge their record or not.

Thousands of drug convictions to be reduced as part of criminal justice reform effort →

The Clean Slate/Automatic Expungement law was passed in 2019. It directs the courts to build a system that will automatically expunge low-level offenses for those with minimal criminal history after a period of law-abiding citizenship.

Community members seeking assistance from the Expungement Navigation Project can sign up for assistance [here](#).