



OFFICE OF LEGAL SERVICES INNOVATION
An Office of the Utah Supreme Court

**October 24, 2023
Meeting Minutes**

Committee Members

John Lund, Chair
Nathanael Player, Vice Chair
Lindsey Brandt
Christopher Martinez
Thomas Michael Clarke
Alyson McAllister
John Rees
Lucy Ricca
Rebecca Sandefur

Innovation Office Staff

Andrea Donahue

Court & Bar Staff

Maribeth Lehoux
Nick Stiles
Tucker Samuelson

Guests

Vanessa Rozalen

I. Welcome and Approval of September 2023 Minutes

- a. Mr. Lund welcomed Mr. Martinez and Ms. Brandt to the Committee.
- b. Mr. Player moved to approve the minutes. Mr. Rees seconded the motion, and the motion unanimously passed.

II. Regulatory Review: Backlogged Applications

- a. Ms. Donahue informed the new Committee members that the Committee has been working through a backlog of applications that were received before the Court paused applications, including applications submitted in 2022 and the beginning of 2023. Ms. Donahue thanked Ms. Ricca for her assistance with the backlogged applications.
- b. Ms. Donahue presented the applications submitted by El Martillo and Utah Accident Firm; Ms. Donahue re-stated the Court's directive regarding the new Innovation Requirement for the new Committee members. An appeals process is available for denied applications.
 - i. The Committee discussed the Innovation Requirement and the objective of reaching underserved consumers.
 - ii. The Committee deliberated on the applications, finding that neither application met the Innovation Requirement.
 - iii. Mr. Player moved to deny the application from El Martillo and the application from Utah Accident Firm. Ms. Ricca seconded the motion, and the motion unanimously passed.

III. Fee Policy

- a. Mr. Lund explained that the goal of the fee policy is to make the Office self-funded; to this point, no fees have been charged to participating entities. Mr. Lund explained that they had received feedback from entities regarding the proposed revenue fee and requested input from the Committee regarding different options: the original revenue fee, a capped revenue fee, and flat fees. It was additionally noted that the current fee policy would allow for noncompliant entities to not have to pay the revenue fees.
 - i. The Committee discussed the pros and cons of the different fee options, including administrability/simplicity, feasibility, potential enforcement needs, and fairness for nonprofits and smaller entities.

IV. Data Report

- a. Mr. Samuelson introduced himself to the Committee as the Director of Judicial Data and Research. Mr. Samuelson explained the format and function of the monthly data reports.

V. Current Entities

- a. Ms. Donahue provided an update on complaint submissions which have been reviewed by the Operations Committee.

VI. Annual IIALS Committee

- a. Ms. Ricca provided a summary of topics discussed at the convening hosted by the Institute for the Advancement of the American Legal System. Ms. Ricca, Ms. Donahue, and Mr. Lund attended the convening, which brings together individuals who are involved in rethinking the regulation of legal services to allow for more providers of legal services.

VII. Closed Session

- a. The Committee voted to enter into closed session.

VIII. Regulatory Review (cont.)

- a. The application from The New Immigrant was raised for a vote.
 - i. Mr. Player moved to deny the application from The New Immigrant. Mr. Martinez seconded, and the motion unanimously passed.
- b. The Request for Reconsideration from Johnson Samoza Hogan was raised for a vote.
 - i. Mr. Player moved to defer the Request for Reconsideration from Johnson Samoza Hogan. Mr. Rees seconded the motion, and the motion unanimously passed.

IX. Adjournment