



[Draft] Minutes

Supreme Court's Office of Legal Services Innovation Committee

Administrative Office of the Courts
450 South State Street
Salt Lake City, Utah 84114

Held via Zoom
Tuesday, March 5, 2024
1:00 pm to 2:30 pm

PRESENT

John Lund – Chair
Nathanael Player – Vice Chair
Lindsey Brandt
Thomas Michael Clarke
Nick Hafen – Secretary
Christopher Martinez
Alyson McAllister

John Rees
Nick Stiles
Ciriac Alvarez Valle
Andrea Donahue – Staff
Tanya Rosado – Staff
Tucker Samuelson – Staff
Will Pelletiers – Staff

EXCUSED

Rebecca Sandefur
Lucy Ricca

GUESTS

Stewart Ralphs
Joanna Sagers
Kirsten Shumway

Noella Sudbury
Rebecca Vasquez

1. Discussion: John Lund
Welcome and Public Comment

John Lund opened the public comment period. There were no public comments.

2. Vote: John Lund
Approval of February 2024 Minutes

Mr. Lund invited a motion for approval of the February 2024 meeting minutes.

Lindsey Brandt moved to approve the minutes, and John Rees seconded the motion. The motion passed unanimously.

3. Update and Vote: Nathanael Player
Pre-Launch Assessments

Mr. Player presented to the Committee an example pre-launch assessment for family law. Mr. Player worked with Stewart Ralphs (Legal Aid Society) and Commissioner Joanna Sagers (Commissioner, Third District Court) to develop the assessment, which could be a requirement for entry into the sandbox for entities practicing family law.

Commissioner Sagers suggested an additional training requirement where applicants who would be delivering legal services under a sandbox authorization attend court hearings to become familiar with the relevant law and procedures.

Mr. Player moved to adopt the pre-launch assessment and court attendance requirement, and Christopher Martinez seconded the motion. The motion passed unanimously.

4. Discussion and Vote: Thomas Clarke
Reduced Data Reporting
Requirements for Licensed Entities

Thomas Clarke provided an update on the Data Working Group's analysis of the data reporting requirements for licensed entities. The Working Group concluded that reporting obligations should continue only for complaints and total number of services provided. Complaints should be reported more frequently, potentially on a monthly basis, and total number of services should be reported on an annual basis.

The committee asked questions of Noella Sudbury, CEO of Rasa, a regulated entity, regarding the reporting burden. Ms. Sudbury explained that her company is happy to provide the requested data but that manually entering the data is burdensome.

Ms. Donahue updated the Committee on the current efforts to transition entities' data reporting from a manual process to the new database.

5. Report: Andrea Donahue,
Data Report and Office Report Tucker Samuelsen

Ms. Donahue provided an update on the Supreme Court's consideration of the Committee's recommendation to make applicant credit checks discretionary rather than mandatory. Ms. Donahue also reported that the new application portal is now live, and five applications have been submitted.

Tucker Samuelsen updated the Committee on improvements and updates to the data reports.

Following this discussion Mr. Player moved for the Committee to move to a closed session, and the Committee closed the meeting.

6. Regulatory Review Following Closed Session:

Ms. Brandt moved to deny Johnson Hogan's Request for Reconsideration based on a failure to meet the Innovation Requirement. The motion passed unanimously.