



Meeting Minutes Supreme Court's Office of Legal Services Innovation Committee

Held via Zoom

Tuesday, January 20, 2026

1:00 pm to 2:30 pm

COMMITTEE MEMBERS

Alyson Carter McAllister – <i>Chair</i>	Present	Ciriac Alvarez Valle	Present
Nick Hafen – <i>Vice Chair</i>	Present	Barclay Burns	Excused
Lindsey Brandt	Present	Elizabeth Wright	Excused
Christopher Martinez	Present	Andrea Donahue – <i>Staff</i>	Present
J. Brett Chambers	Excused	Tanya Rosado – <i>Staff</i>	Present
Janine Liebert	Excused	Nick Stiles – <i>Court Staff</i>	Excused
Megan Glasmann	Present	Tucker Samuelson – <i>Court Staff</i>	Present
Gretchen Lee	Excused		
Kimberly Farnsworth	Excused		

GUEST(S)

Melanie Webster	Hayley Cousin
Jaxon Didericksen	Dejon Brooks

1. Discussion: **Alyson McAllister**
Welcome and Public Comment

Ms. McAllister welcomed all attendees and opened the floor for public comments. There were no public comments.

2. Discussion: **Christopher Martinez**
Revised Data System - Implementation

This item was moved up in the order based on Mr. Samuelson's availability. Mr. Martinez presented on behalf of the Data Working Group, describing that implementation of the new data reporting system is in progress. As part of this, the group discussed the need to provide further instruction to entities for the terms "consumer" and "complaint" for reporting moving forward. Mr. Martinez opened the floor for input.

The additional guidance would clarify that “consumer” includes recipients of legal assistance, regardless of payment and would provide more specific information as to the types of grievances, including to third parties if known. Complaints are to be reported regardless of whether harm has been verified.

Ms. McAllister expressed approval. Mr. Samuelson explained that one of the challenges with the previous reporting system was that “services” was not well defined and led to a high amount of confusion from entities. There was an array of different legal areas. A large amount of the data analyst’s time (when this position existed in the project) was spent on this confusion. Focusing on consumers instead should be less ambiguous and easier for entities to report. This new system should be cleaner and simpler for entity reporting. Ms. Brandt remarked that things seemed good to move forward.

**3. Vote: Alyson McAllister
Approval of December Meeting Minutes**

Ms. McAllister invited a motion for approval of the December 2025 meeting minutes.

Ms. Brandt moved to approve the minutes. Mr. Hafen seconded the motion, and it passed unanimously.

**4. Discussion and Vote: Andrea Donahue
Phase 2 Policies**

Ms. Donahue described the three policies that were revised by the Committee and are set for implementation in 2026: data reporting, consumer disclosure language, and consumer survey. The Supreme Court approved the revised consumer disclosure language to replace the Sandbox badge at the close of the year with minor clarifications. Most notably, they added the words “in Utah” to emphasize the jurisdictional limitations of authorization. Implementation of these policies will be staggered and paced to allow for the finalization of details, to work with entities on any troubleshooting issues and questions, and to ensure proper compliance, avoiding previous difficulties in this area.

Ms. Brandt motioned for the Committee to go into closed session. Mr. Hafen seconded the motion, and the Committee closed the meeting.

5. Post-Closed Session

In regards to the data system topic from earlier in the meeting, Ms. Donahue explained that the Data Working Group found that it would be useful for the reporting metric for counties of consumers served to be broken down into number of consumers per county. This had been inadvertently omitted from the earlier discussion. There was no disagreement from any Committee members.

Mr. Hafen moved the Committee into voting for applications.

Mr. Hafen moved to deny LegalOS for not meeting the Utah Innovation Requirement and for not proposing a Utah-specific model. Ms. Alvarez Valle seconded the motion, and it passed unanimously.

6. Corporate Controlling and Financing Persons

Ms. Donahue noted that the Committee has not clarified how entity Controlling and Financing Persons should be treated in applicant vetting and in annual disclosures. This has been previously discussed as an area of need, including when John Rees was on the Committee, given his corporate law expertise. Mr. Rees had cautioned of the complexity involved. Ms. McAllister suggested that perhaps Mr. Chambers would have some knowledge/expertise in that area.

Mr. Martinez motioned to adjourn the meeting. Ms. Brandt seconded the motion, and the meeting was adjourned.