



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

Held via Zoom

Tuesday, April 21, 2026

1:00 pm to 2:30 pm

COMMITTEE MEMBERS

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

GUEST(S)

Karla Valenzuela	Hayley Cousin - <i>CJAU</i>
Ramon Samoza - <i>Synergy Legal</i>	Jaxon Didericksen - <i>USU</i>
Dejon Brooks - <i>Synergy Legal</i>	

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

Ms. McAllister opened the floor for public comments. There were no public comments.

2. Vote: **Alyson McAllister**
Approval of March Meeting Minutes

Ms. McAllister invited a motion for approval of the March 2026 Meeting minutes.

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

3. Discussion and Vote: **Andrea Donahue**
Consumer Disclosures

Ms. Donahue described that the Committee's discussion regarding additional consumer disclosure requirements for umbrella entities was tabled from the March meeting. The two umbrella entities, CJAU and USU TCI, have a unique structure in which legal services are not

provided by the Sandbox entity but instead are provided through community justice advocates housed at community-based organizations such as nonprofits and government agencies. Both entities were invited to attend to answer any questions from the Committee.

To gather information, staff met with CJAU and USU TCI. These entities described that it would be challenging to require these host organizations to add the footer to the website due to capacity and resource concerns. Additionally, CJAU reported that these services can happen in a “print world.” However, requiring the consumer disclosure language in client agreements for Sandbox services is in line with current practice.

Ms. Lee asked a clarifying question as to whether there were other instances when the language should be displayed outside of the agreements. Ms. Donahue responded that this would include advertising/outreach materials, in line with the revised policy.

Ms. Donahue added that the consumer disclosure language would need a slight edit for accuracy: instead of “this organization,” it would say “the individual you received legal help from.” Additionally, it is possible to highlight the limited scope further in print language as there’s more space than with the website footers. The words “in certain circumstances” could be added after “allowing nonlawyers to practice law” to underscore the limited-scope nature of the services. Ms. Glasmann expressed approval of the additional language, noting that greater transparency for consumers is better. Mr. Chambers and Ms. Alvarez voiced approval as well.

Mr. Chambers motioned to recommend the requirement for umbrella entities to include the consumer disclosure text in print documents which include agreements and advertising materials. Ms. Alvarez Valle seconded the motion, and it passed unanimously.

Ms. Lee moved to approve the proposed language. Mr. Chambers seconded the motion, and it passed unanimously.

Ms. McAllister addressed the question of whether verbal consent is sufficient for a hotline situation, as posed by CJAU. Mr. Hafen asked CJAU whether the actual legal service/advice would be provided over the phone. Ms. Cousin clarified that it would.

Mr. Martinez expressed that self-reporting of providing a disclosure might not be sufficient. He posed whether a message confirmation or recording would address the issue. Ms. Alvarez stated that there may be some barriers to a text message. Mr. Somoza provided a comment regarding the feasibility of recording.

Ms. Cousin of CJAU said she would speak with her partners to see what a feasible option is for capturing verbal consent.

4. Update:

Nick Stiles

Ad Hoc Regulatory Reform Committee

Mr. Stiles presented an update on the work of the Ad Hoc Regulatory Reform Committee, which functions largely as a study and report writing group, following on the previous presentation from Maryt Frederickson. Mr. Stiles noted that he is a Co-Chair along with Ms. Frederickson. Ms. Donahue expressed that it might be helpful for the LSI Committee to hear the timeline for the Regulatory Reform Committee's work.

Mr. Stiles highlighted that the end of the Sandbox is August 2027, and the final recommendations should be provided to the Supreme Court in August or September of this year at the latest. This will provide about a year to institutionalize the efforts that will come out. He reiterated that the different areas being reviewed are Rule 5.4, Licensed Paralegal Practitioners, Community Justice Advocates, and AI and Legal Tech. Mr. Stiles then walked through the interim report recommendations, for which the pathways are currently more limited than what the Sandbox is allowing.

Mr. Stiles described that things are no longer in the testing phase; this is a transition to institutionalize models that are aligned with the direction the Court is going.

5. Discussion: Phase 3

Alyson McAllister

Ms. McAllister announced that the Court will be sending out a Phase 3 letter, giving the Court's guidance and direction on the remaining time left of the Sandbox and the halting of application submissions.

6. Discussion and Vote: Amendment Request

Andrea Donahue

Ms. Donahue informed the Committee of CJAU's request to amend their authorization order to allow training of volunteers as well as employees.

The Committee discussed the request. Mr. Chambers inquired about CJAU's ability to maintain quality control with volunteers. Ms. Cousin described the case level information collected and described that the volunteers would be trained and monitored in the same way as employees.

Ms. Lee expressed needing to allow for consistency and standards, noting that the decision would be precedent-setting; Mr. Hafen noted that there is some individualization with authorization orders.

Mr. Hafen moved to approve the amendment request. Ms. Brandt recused herself. Mr. Chambers seconded the motion. There were no opposing votes.

Ms. Brandt motioned to move to closed session. Ms. Lee seconded the motion, and the Committee closed the meeting.

7. Post-Closed Session

Mr. Hafen moved to send a letter to current entities reminding them that their authorization extends only to Utah and not other jurisdictions. Ms. Brandt seconded the motion, and it passed unanimously.