



Meeting 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, June 16, 2026
1:00 pm to 2:30 pm

COMMITTEE MEMBERS & STAFF

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

GUEST(S)

Jayne Walters – <i>USU TCI</i>	Dejon Brooks
Nathanael Player – <i>USU TCI</i>	Karla Valenzuela
Hayley Cousin – <i>CJAU</i>	Vanessa Ramirez

1. Discussion:

Alyson Carter McAllister

Welcome and Public Comment

Ms. McAllister welcomed all attendees and opened the floor for public comments.

There were no public comments.

2. Vote:

Alyson Carter McAllister

Approval of May Meeting Minutes

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

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

3. Update:

Andrea Donahue

Sandbox Phase 3 – Court Conference

Ms. Donahue provided an update that the Office implemented the application cut-off at the end of May, per the Supreme Court’s direction for Phase 3. She also stated that May’s Supreme Court Conference was cancelled, and outstanding items will be addressed at the upcoming Conference this month.

4. Discussion:

Tucker Samuelson

Consumer Survey

Mr. Samuelson addressed the Committee regarding implementation of the Sandbox consumer survey. The Committee previously tabled the question of the implementation requirements for entities with existing surveys, including whether these entities could substitute their own surveys or somehow incorporate the Sandbox survey into their own surveys.

Mr. Samuelson stated that the Data Working Group recommends that the Sandbox consumer survey be kept as a separate, stand-alone survey. He explained that this would allow for administrative simplicity and independence in that all results are coming in through the same place. Mr. Samuelson also referred to the administrative work tied to surveys and turnover on the court as the project is in wrap-up mode. Ms. Donahue reiterated the main points of the previous Committee discussion, including that the Committee had flagged the ability to include a purpose statement as a concern. The Committee has also discussed the objective of consistency, which is difficult if some survey results are collected by the Bar and others are collected by entities themselves.

Mr. Samuelson further stated that the Data Working Group recommended that the survey be sent to ALP consumers only, in line with the objectives of the Sandbox, as not much value would be added if the survey went to all consumers.

The Committee then discussed the applicability of the survey in the current timeframe. Ms. McAllister raised that the Supreme Court has announced a new phase of the Sandbox, taking into account the limited time remaining. At this point the original purpose of the survey may not be as applicable. With this new development, it makes sense to get more direction from the Court before moving forward.

The Committee tabled the item to get more direction from the Court.

5. Discussion and Vote:

Megan Glasmann

Amendment Request – USU TCI

Ms. Glasmann spoke on behalf of the Policy/Compliance Working Group and described the amendment request submitted by USU TCI. As part of the request, UCU TCI seeks to change the language around who is able to participate as a community justice advocate to “helping professionals.” The Policy/Compliance Working recommends that USU provide a definition and/or examples for this term.

Additionally, USU TCI has asked to expand to upwards of 6 new practice areas. This raises a concern with the limited amount of time remaining in the Sandbox. The Working Group would like to see an executive summary that includes a timeline. Another concern raised was about malpractice insurance; the Working Group would like to get additional details. Ms. Glasmann also mentioned that the Working Group discussed ongoing CLE, which may be a consideration for the Ad Hoc Regulatory Reform Committee following the Sandbox’s sunset.

The Committee did not raise additional questions.

Ms. Donahue mentioned that the amendment request included removing “legal information.” She expressed that the term was carried over from earlier authorization orders that were more descriptive; the Committee and Court have discussed wanting to focus the authorization orders on what is necessary for regulation. This seems to fit into that objective.

Ms. Glasmann motioned to request the additional information as set out in the memo. Ms. Alvarez Valle seconded the motion. The motion passed unanimously. (Ms. Brandt recused herself.)

6. Discussion and Vote:

Lindsey Brandt

Applications

Ms. Brandt spoke on behalf of the Applications Working Group. Three Peaks Advisors's application appears to be Low Innovation, and the recommendation is for denial. Additionally, the model doesn't seem to fit into the Phase 3 guidelines as there appears to be no plausible pathway for for-profit ALPs, and it is not clear if there is a Utah-specific model. The Supreme Court can consider the potential one-stop-shop aspect.

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

7. Voting on Items from Closed Session

Mr. Chambers moved to deny the application from Three Peaks Advisors based on being an ABS/Low Innovation entity, as it is unclear why Sandbox authorization is needed apart from non-lawyer ownership. Additionally, there appears to be no plausible connection under the Phase 3 guidance as there is currently no pathway for for-profit ALPs. Further, the application would be referred to the Ad Hoc Regulatory Reform Committee. Ms. Brandt seconded the motion. The motion passed unanimously.

8. Discussion:

Andrea Donahue

Phase 3 Next Steps

Ms. Donahue reiterated the direction from the Supreme Court to focus on what is necessary to regulate entities for the time remaining in Sandbox period. She welcomed Committee members to give their perspectives on what makes sense to focus on for the remaining time. She also provided an update that the Office is in the process of collecting the annual fee.

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