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

Held via Zoom
Tuesday, September
15, 2026
1:00 pm to 2:30 pm

COMMITTEE MEMBERS

Alyson Carter McAllister – *Chair*	Present	Barclay Burns	Excused
Nick Hafen – *Vice Chair*	Present	Gretchen Lee	Excused
Lindsey Brandt	Present	Kimberly Farnsworth	Present
Christopher Martinez	Present	Ciriac Alvarez Valle	Present
J. Brett Chambers	Excused	Elizabeth Wright—*Ex Officio*	Excused
Janine Liebert	Present	Andrea Donahue—*Staff*	Present
Megan Glasmann	Present	Tucker Samuelsen — *Staff*	Present
		Maribeth LeHoux—*Staff*	Present

GUEST(S)
Nectaria Kurth
Hayley Cousin – *CJAU*

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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 August Meeting Minutes

Ms. Donahue raised two minor changes for the draft minutes, thanking Mr. Hafen. The first correction was to clarify that "connection to Utah" referred to a "Utah-specific model," and the second was to add the action of denial into one of the motions. Ms. McAllister invited a motion for approval of the August 2026 meeting minutes with the minor edits.

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

3. **Update:** **Alyson McAllister**
   Court Conference **Andrea Donahue**

Ms. McAllister and Ms. Donahue provided an update from the August conference with the Supreme Court. The Supreme Court approved the amendment request from USU TCI to add landlord/tenant as a legal area, to use the "helping professionals" term, and to add negotiation as an allowable activity for its CJAs. The additional practice areas were referred to the Ad Hoc Committee on Regulatory Reform. The Court thanked Mr. Chambers for the question he raised regarding the Governmental Immunity Act.

Additionally, clarification was provided on the role of out-of-state lawyers. The Supreme Court confirmed that the statement from the Phase 1 application that "[t]he Sandbox is not meant to be a mechanism by which out-of-state lawyers can practice in Utah without otherwise completing the requirements imposed by the Utah State Bar" is still in place. This will continue to be factored into assessments.

Leadership is working with the Court on a rolling basis for membership renewals.

4. **Discussion and Vote:** **Nick Hafen**
   Phase 3: Ad Hoc Committee on Regulatory Reform - AI

Mr. Hafen provided an update on the Ad Hoc Regulatory Reform Committee's AI/Legal Tech Work Group, which recently resumed its meetings. Mr. Hafen explained that the group is working on a draft carve-out of the rule prohibiting the unauthorized practice of law as long as there are certain disclaimers, including that the service is not the same as advice from an attorney and doesn't qualify under the attorney-client privilege. The group also discussed addressing disbarred or disciplined attorneys that may be seeking a backdoor to practicing law; they are continuing to work on that language. Discussions will continue next week.

5. **Discussion and Vote:**
   Annual Disclosures

Ms. Glasmann reported that the Policy/Compliance Working Group believes it is helpful to continue forward with annual disclosure questions. Ms. Donahue thanked the

Policy/Compliance Working Group for their work.

Ms. Alvarez stated that the Working Group had added a few questions for consideration, including: (1) a list or number of Utah-licensed attorneys, (2) anticipated changes before August 2027, (3) an estimate of the proportion of legal services inside versus outside of Utah (whether it's a small number of people served), and (4) as much information as possible on the access-to-justice question (statistics).

Ms. Donahue provided background, explaining that the annual disclosure requirement first came up in 2023 when operations moved to the Bar. Prior to Phase 2, alternative business structures (ABSs) were a large portion of Sandbox entities, and the anticipated requirements were similar to Arizona's ABS program. The Sandbox has moved away from ABS-onlys since then to focus on alternative legal providers (ALPs). Additionally, as the Sandbox is now beyond the information-gathering stage, the Supreme Court wants to make sure there is a focus on the regulatory purpose and for future recommendations.

Ms. Glasmann noted that a question was added regarding amendments/expansion; for example, the Committee knows that USU TCI plans to expand in the last year of the Sandbox. Ms. Donahue added for general reference that 19 entities have limited Rule 5.4 waivers and are not subject to Sandbox requirements.

A specific question for software alternative legal providers had been considered but not included; the Committee can choose to reach out to them separately outside of the general process.

Ms. McAllister opened the floor for questions or comments.

Ms. Farnsworth opined that asking for the number of Utah-licensed attorneys should be sufficient. Ms. McAllister noted the Supreme Court's previous concerns regarding validating the existence of Utah attorneys. Ms. Donahue explained that the form addressed this by asking for identification of Utah attorneys overseeing the quality assurance process.

Ms. McAllister suggested that a parenthetical could be added to the question regarding Utah legal services to add clarity for entities. Ms. Alvarez proposed that a percentage could be asked for. Ms. McAllister asked about the intent of the inclusion of statistics in the question regarding the Utah Innovation Requirement, noting that an entity may not be sure what statistics the Committee is looking for. This could also be left more open-ended. Ms. Farnsworth described the opportunity for demographics (federal poverty line) as well as traditional access-to-justice legal areas.

6. Applications

Mr. Hafen gave an overview of the application from Renaissance Development, describing that its model looks like it's for gathering leads/referrals to pass onto attorneys. Mr. Hafen described some ambiguities in its model, including that it was not clear whether authorization was needed for AI and whether there was a Utah-specific model. Regarding future regulation, it does not currently appear that the Court will have a path forward for changes to Rule 5.4 based on the anticipated recommendations of the Ad Hoc Committee.

Ms. Donahue touched on the alignment with the Ad Hoc Committee on Regulatory

Reform, describing that the Rule 5.4 Work Group, of which Ms. McAllister is a member, hasn't met recently but seems unlikely to be making recommendations to change Rule 5.4.

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

7. Post-Closed Session

Mr. Hafen moved to deny the application from Renaissance Development due to the lack of a path forward under the Court's Phase 3 guidance and a lack of a Utah-specific model.

8. Operations

Ms. Donahue announced that the Innovation Office is down to one staff member for the remainder of the project. She thanked Ms. Rosado for her important work on the project, including in addressing previous challenges and strengthening monitoring systems.

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