

## Utah State Bar Commission Meeting

Friday, September 22, 2023

Ballroom

Snowpine Lodge - Alta, Utah

### AGENDA

#### 12:00 Noon - Working Lunch

#### 1. President's Welcome and Reports: Erik Christiansen

- 03 Mins. 1.1 Admissions Ceremony – 12:00 Noon, October 27<sup>th</sup> at the Salt Palace  
03 Mins. 1.2 Lawyer-Legislator Breakfast – **November 15th** - 7:30 a.m. at State Capitol  
05 Mins. 1.3 Judicial Council Report: **Margaret Plane**

#### 2. 12:30 p.m. Action Items

- 05 Mins. 2.1 Approve Purchase of a Table for the November 10<sup>th</sup>  
UMBA Scholarship & Awards Banquet at Little America  
10 Mins. 2.2 Request to Fund Oral History Videos (Tab 1, Page 3)  
15 Mins. 2.3 Approve Fall Forum Award Recipients (Tab 2, Page 6)

#### 3. 1:00 p.m. Strategic Planning with Chris Newbold

#### 4. 4:30 p.m. 2024 Legislative Session: Senator Kirk Cullimore and Representative Brady Brammer

6:30 -7:00 p.m. Cocktails on the Pool Lawn

7:00 p.m. Dinner in the Ballroom

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## Utah State Bar Commission Retreat

Saturday, September 23, 2023

Ballroom

Snowpine Lodge - Alta, Utah

### AGENDA

7:00 – 9:00 a.m. Breakfast at your convenience @ Swen's Restaurant

1. 9:00 a.m. Strategic Planning

Noon Lunch on the Great Lawn

ADJOURN

## **CONSENT AGENDA**

(Tab 3, Page 25)

(Approved without discussion by policy if no objection is raised)

1. Approve minutes of August 17, 2023 Commission Meeting

## **ATTACHMENTS**

(Tab 4, Page 29)

1. August 2023 Financials

## **CALENDAR**

October 27	Admissions Ceremony	12:00 Noon	Salt Palace
November 15	Breakfast with Lawyer Legislators	7:30 a.m.	State Capitol
November 10	UMBA Awards Banquet		Little America
October 6	Access to Justice Summit		Law and Justice Center
November 17	Fall Forum		Little America Hotel

## **2024**

January 1	President-elect Election Notices Due
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**TAB**  
**1**

**BRUCE R. BAIRD PLLC**

ATTORNEY AND COUNSELOR

2150 SOUTH 1300 EAST, FIFTH FLOOR

SALT LAKE CITY, UTAH 84106

TELEPHONE (801) 328-1400

BBAIRD@DIFFICULTDIRT.COM

September 11, 2023

**VIA EMAIL ONLY**

Ms. Elizabeth Wright  
Executive Director  
Utah State Bar

**Re: Oral History Proposal**

Dear Elizabeth:

Following up on my meeting with the Bar Commission in August (after my return from extensive travel and dealing with several client emergencies) please consider this letter to be a proposal as the Commission requested for my suggested series of living histories of some of our great lawyers. As I stated, we have lost too many great lawyers in the recent past whose lives, war stories and wisdom should have been preserved for the ages. As I did on my own dime for my friend Larry Weiss. If the benefit of doing so is not self-evident to everyone I will not waste my time trying to explain it. I try not to waste time restating what should be obvious.

First, I propose that a small working group be formed to select the lawyers whose life stories should be saved. I have a list that I have previously provided as does Alan Sullivan. I am sure that there are many others. As I stated to the Commission, I hate bureaucracy but I am sure that a few of us, over a few bottles of fine wine that I would be happy to provide, can come up with a pretty good list pretty quickly. I propose that we try to do between 3 and 4 videos per year.

The format would be pretty simple. Someone is chosen to do the interviews; either a friend of the subject or someone with experience in doing this type of interview. I would be happy to assist. The subject and interviewer would meet and layout the subjects and stories to be covered. The interview would be conducted in a convivial location such as the person's home. An informal location unless the subject feels more comfortable in a more formal location. Probably 3 cameras (they can be remotely controlled so you just need one shooter). For an interview of approximately 1 hour of final material I believe that it will likely take 3 – 4 hours of raw video. After the video is shot it will be edited to take out the dead air, repetitions, etc. and to get the run time to about an hour.

Ms. Elizabeth Wright  
September 11, 2023  
Page 2

Based on my prior experience and, also, checking around with other video production companies, I believe that the total cost for production, including editing, should be less than \$5,000 per video. (I do not believe that perfection is required; this is life, not a Ken Burns production.) Thus, the maximum total cost per year would be either \$15,000 or \$20,000 per year depending on whether there were 3 or 4 shootings in any one year. I believe that some of this cost could be offset by using the videos for CLE and charging a small amount. I know that at least 220 people watched the Larry Weiss video at the Annual Meeting a few years ago to very positive reviews. Since I am not a CLE provider I really cannot hazard a guess about how much of the production costs could be recouped from that income stream. I also do not know if any of the production costs could be raised by contributions from any of the sections. (And I don't want to waste time getting started to find out.)

But I do know that what I am proposing is a mere pittance in a total annual budget of about \$8,000,000. And I do know that we should all feel very badly if any more great lawyers like Gordon Roberts die without having their lives and wisdom preserved for the benefit of our profession. The celebration of Gordie's life at the Country Club was nice and we all shared stories about him but the attendance was, by definition, limited and the experience evanescent.

I stand ready, willing and (fortunately) able to assist. I also look forward to any input from Alan.

I would simply ask that this proposal be considered with something greater than "all deliberate speed". Time and the grim reaper wait for no man or woman. I look forward to hearing from you.

Sincerely,



Bruce R. Baird

cc: Mr. Alan Sullivan, Esq.

**TAB**  
**2**

**UTAH STATE BAR AWARDS COMMITTEE  
AWARD RECOMMENDATION**

**TO:** Utah State Bar Commission  
**DATE:** September 22, 2023  
**RE:** AWARD RECOMMENDATION – Professionalism Award

**CRITERIA:**

*Awarded to a lawyer or judge whose department in the practice of law represents the highest standards of fairness, integrity, and civility.*

**NOMINEES:**

**2023 Nominees:**

1. Hon. George Harmond
2. Mica McKinney
3. Nicholas Turner

**2022 Nominees:**

1. Robert Poulsen

**RECOMMENDATION:**

The Utah State Bar Awards Committee met on September 20, 2023 to review and discuss the nominations and voted to recommend the following:

Hon. George Harmond

**PREVIOUS RECIPIENTS:**

2004	HON. GORDON J. LOW	2012	PAUL M. DURHAM
2004	RICHARD W. CAMPBELL	2013	WILLIAM S. BRITT
2004	STEPHEN B. NEBEKER	2014	LAURA S. SCOTT
2004	M. DAYLE JEFFS	2018	TARA ISAACSON
2004	KEN CHAMBERLAIN	2016	PATRICK L. ANDERSON
2005	HON. RICHARD C. HOWE	2017	LINDA M. JONES
2006	BERT L. DART, JR.	2018	TERRY L. WADE
2007	FRANCIS J. CARNEY	2019	HON. EVELYN J. FURSE
2008	ELLEN MAYCOCK	2020	MARGARET D. PLANE
	DON WINDER	2021	JULIETTE P. WHITE
2009	CRAIG R. MARIGER	2022	ROBERT S. CLARK
2010	TIMOTHY B. ANDERSON		
2011	T. RICHARD DAVIS		

## Christy Abad

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**From:** info@utahbar.org <webhost@utahbar.org>  
**Sent:** Tuesday, September 12, 2023 3:23 PM  
**To:** Christy Abad  
**Subject:** New submission from Nomination Bar Awards

### Nominator Name

Michael Harmond

### Bar Number

17230

### Email address

meharmond@hollandhart.com

### Date

09/12/2023

### I The Above, Desire to Nominate the Following

Utah State Bar Member

### Nominee's Name

George Harmond

### Award

Professionalism Award (Fall Forum)

### REFERRING TO THE AWARD CRITERIA, IN 400 WORDS OR LESS, PLEASE STATE THE REASON FOR THE NOMINATION, I.E. THE NOMINEE SHOULD RECEIVE THIS NOMINATION FOR THE FOLLOWING REASONS OR BASED UPON THE FOLLOWING FACTS OR EVENTS:

I hereby nominate my dad, Judge George M. Harmond, for the Professionalism Award. Judge Harmond's 18 years of service in the Seventh District has been characterized by the utmost in fairness, integrity, and civility to the people of Carbon, Emery, and San Juan counties.

Judge Harmond has built a reputation throughout the state as a fair and thoughtful judge who shows integrity by taking his work seriously, and who treats all who appear before him with respect and kindness, particularly criminal defendants and pro se litigants. I've personally heard from former classmates and acquaintances who have appeared before Judge Harmond as criminal defendants that their sentence was fair and that they felt respected. Judge Harmond's judicial temperament helped them see the experience as a wake-up call rather than adverse event. This is unsurprising knowing that Judge Harmond's philosophy is one of civility and compassion: most who appear before him come from challenging circumstances and have had difficult lives - wouldn't it be best for a critical institution like the courts to treat them with respect and dignity?

Along with these qualities, Judge Harmond has served as a leader on bail reform and drug court. He chaired for many years the Courts' pre-trial release committee, where he advocated for the adoption of evidence-based practices that best serve Utahns. He has also been a proponent of drug courts locally in the rural communities he serves, which have been hard hit by the opioid crisis. Judge Harmond was also elected by his peers to serve on the Utah Judicial Council from 2011 - 2014.

In short, for nearly two decades, Judge Harmond has been an example to both the bench and bar in fairness, integrity, and civility. Thank you to the committee for their consideration.

### Please select one:

My nomination is public and I give permission for my nomination to be shared with the nominee and published, whole or in part, by the Utah State Bar.



**UTAH STATE BAR AWARDS COMMITTEE  
AWARD RECOMMENDATION**

**TO:** Utah State Bar Commission  
**DATE:** September 22, 2023  
**RE:** **AWARD RECOMMENDATION – 2023 James Lee, Charlotte Miller, Paul Moxley Mentoring Awards.**

**CRITERIA:**

*Awarded to three individual attorneys who have demonstrated exceptional commitment to the mentorship of Utah lawyers, generally. These individuals have guided lawyers throughout their professional training in a continuing, multifaceted partnership sustained by mutual respect and concern. These mentors make a broad impact on mentorship by facilitating communities or building infrastructure. They have provided intellectual leadership, created a supportive environment, have acted as advocates, and promoted diversity and inclusiveness.*

**NOMINEES:**

**2023 Nominees:**

1. Daniel Black
2. Philip Lear
3. Douglas Thayer

**2022 Nominees:**

1. Josh Baron
2. Marco Brown
3. Hon. Augustus Chin (2003 Scott M. Matheson Award, 2018 Raymond S. Uno Award)
4. Michael Garrett
5. Jonathan Jemming
6. Colin King
7. Jeffrey C. Miner
8. I. Robert Wall

**RECOMMENDATION:**

The Utah State Bar Awards Committee met on September 20, 2023 to review and discuss the nominations and voted to recommend awards to the following:

The James Lee Mentoring Award -	Hon. Augustus Chin
The Charlotte Miller Mentoring Award -	Marco Brown
The Paul Moxley Mentoring Award -	Philip Lear

**PREVIOUS RECIPIENTS:**

**LEE AWARD:**

2016 Rodney G. Snow  
 2017 Joseph O. Walkowski  
 2018 Cheryl M. Mori  
 2019 Walter A. Romney, Jr.  
 2020 Hon. Laura Scott  
 2021 Edwin S. Wall  
 2022 Hon. Su J. Chon

**MILLER AWARD:**

2016 Jonathan O. Hafen  
 2017 Patricia W. Christensen  
 2018 William F. Atkin  
 2019 Kathleen McConkie  
 2020 Nicholas Mills  
 2021 Kent B. Scott  
 2022 Phillip S. Ferguson

**MOXLEY AWARD**

2016 K. Dawn Atkin  
 2017 Troy L. Booher  
 2018 Shawn McGarry  
 2019 Susan Peterson  
 2020 Bruce Dibb  
 2021 Ann Marie Taliaferro  
 2022 Jennifer S. Huntsman

**Christy Abad**

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**From:** Matthew Page  
**Sent:** Friday, September 30, 2022 12:48 PM  
**To:** Christy Abad  
**Subject:** Fwd: New submission from Nomination Bar Awards

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**From:** info@utahbar.org <webhost@utahbar.org>  
**Sent:** Friday, September 30, 2022 12:39  
**To:** Matthew Page <Matthew.Page@utahbar.org>  
**Subject:** New submission from Nomination Bar Awards

**Nominator Name**

Erin Byington

**Bar Number**

13660

**Email address**

erin@byingtongoble.com

**Date**

09/30/2022

**I The Above, Desire to Nominate the Following**

Utah State Bar Member

**Nominee's Name**

Marco Brown

**Award**

James B. Lee, Charlotte L. Miller, Paul T. Moley Mentoring Awards (Fall Forum)

**REFERRING TO THE AWARD CRITERIA, IN 400 WORDS OR LESS, PLEASE STATE THE REASON FOR THE NOMINATION, I.E. THE NOMINEE SHOULD RECEIVE THIS NOMINATION FOR THE FOLLOWING REASONS OR BASED UPON THE FOLLOWING FACTS OR EVENTS:**

I am nominating Marco Brown because he is constantly willing to help other lawyers through everything from how to increase the profitability of their law practice, to advice on paying off student loans, to networking and introducing lawyers that are able to help each other in their practices. Marco even spends his own funds to provide books and other materials to lawyers that he thinks may be of help or that have greatly inspired him. Getting to know Marco and speaking with him has only made my network, my practice, and my personal finances better, and I believe he has quietly done the same for many of our colleagues. The best part is that Marco also rejoices in the victories of those he knows, asking for no credit to himself.

**Please select one:**

My nomination is public and I give permission for my nomination to be shared with the nominee an published, whole or in part, by the Utah State Bar.

**Christy Abad**

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**From:** Matthew Page  
**Sent:** Friday, September 30, 2022 4:21 PM  
**To:** Christy Abad  
**Subject:** Fwd: New submission from Nomination Bar Awards

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**From:** info@utahbar.org <webhost@utahbar.org>  
**Sent:** Friday, September 30, 2022 12:30  
**To:** Matthew Page <Matthew.Page@utahbar.org>  
**Subject:** New submission from Nomination Bar Awards

**Nominator Name**

Jaime Wiley

**Bar Number**

17729

**Email address**

jaime@peterkern.lawyer

**Date**

09/30/2022

**I The Above, Desire to Nominate the Following**

Utah State Bar Member

**Nominee's Name**

Augustus Chin

**Award**

James B. Lee, Charlotte L. Miller, Paul T. Moley Mentoring Awards (Fall Forum)

**REFERRING TO THE AWARD CRITERIA, IN 400 WORDS OR LESS, PLEASE STATE THE REASON FOR THE NOMINATION, I.E. THE NOMINEE SHOULD RECEIVE THIS NOMINATION FOR THE FOLLOWING REASONS OR BASED UPON THE FOLLOWING FACTS OR EVENTS:**

Judge Chin was my mentor for the New Lawyer Training Program from 2021-2022. Judge Chin's provided incredible guidance and advice while I navigated being a new attorney. He always had a great perspective for any issue I brought to him, and he helped me figure out some really unique cases. He is a passionate advocate and a remarkable mentor.

**Please select one:**

My nomination is public and I give permission for my nomination to be shared with the nominee an published, whole or in part, by the Utah State Bar.

**Christy Abad**

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**From:** info@utahbar.org <webhost@utahbar.org>  
**Sent:** Wednesday, September 13, 2023 9:52 PM  
**To:** Christy Abad  
**Subject:** New submission from Nomination Bar Awards

**Nominator Name**

Cliff Parkinson

**Bar Number**

13327

**Email address**

Cliff.parkinson@usu.edu

**Date**

09/13/2023

**I The Above, Desire to Nominate the Following**

Utah State Bar Member

**Nominee's Name**

Philip Lear

**Award**

James B. Lee, Charlotte L. Miller, Paul T. Moley Mentoring Awards (Fall Forum)

**REFERRING TO THE AWARD CRITERIA, IN 400 WORDS OR LESS, PLEASE STATE THE REASON FOR THE NOMINATION, I.E. THE NOMINEE SHOULD RECEIVE THIS NOMINATION FOR THE FOLLOWING REASONS OR BASED UPON THE FOLLOWING FACTS OR EVENTS:**

Phil has spent his 4 decade career training attorneys, not just in natural resource law, but in how to interface with clients, how to bill, and how to manage large projects. Many members of the natural resource bar today owe their careers to Phil Lear.

**Please select one:**

My nomination is public and I give permission for my nomination to be shared with the nominee an published, whole or in part, by the Utah State Bar.

**UTAH STATE BAR AWARDS COMMITTEE  
AWARD RECOMMENDATION**

**TO:** Utah State Bar Commission  
**DATE:** September 22, 2023  
**RE:** AWARD RECOMMENDATION – Community Member Award

**CRITERIA:**

*Awarded to a non-lawyer member of the community who demonstrates outstanding service toward the creation of a better public understanding of the legal profession and the administration of justice, the judiciary or the legislative process.*

**NOMINEES:**

**2023 Nominees:**

1. Kaitlyn Piper

**2022 Nominees:**

1. Darcy Goddard
2. Gil A. Miller
3. Shawn Newell
4. Margaret Olson

**RECOMMENDATION:**

The Utah State Bar Awards Committee met on September 20, 2023 to review and discuss the nominations and voted to recommend the following:

Kaitlyn Piper

**PREVIOUS RECIPIENTS:**

1986	BONNIE MILLER	2009	KAREN HALE
1987	BRYON HARWARD	2010	LINDA SAPPINGTON
1988	STANFORD P. DARGER	2011	ROBERT MYRICK
1989	ROBERT L. STAYNER	2012	MARY KAY GRIFFIN
1990	KSL	2013	ROBERT AUSTIN
1991	NORMA W. MATHESON	2014	STEVEN R. BURT
1992	STANLEY B. BONHAM	2015	ANNE BURKHOLDER
1993	LYLE K. CAMPBELL	2016	JO LYNN SPRUANCE
1994	RAY O. WESTERGARD	2017	MARIANNA DI PAOLO
1996	SHERIANNE S. COTTERELL	2018	KAI WILSON
1997	MARGARET R. BIRD	2019	DET. GREG SMITH
1998	JOHN FLOREZ	2021	BERTIE KEE LOPEZ
1999	RAY O. WESTERGARD	2022	SHAWN NEWELL
2000	JENNIFER YIM		
2001	JO BRANDT		
2002	SYLVIA BENNION		
2003	FRASER NELSON		
2004	PEGGI LOWDEN		
2005	REV. FRANCE A. DAVIS		
2006	DONNA K. W. JOHNSON		
2007	DANIEL J. BECKER		
2008	CARMA J. HARPER		

**Christy Abad**

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**From:** info@utahbar.org <webhost@utahbar.org>  
**Sent:** Wednesday, September 13, 2023 9:45 PM  
**To:** Christy Abad  
**Subject:** New submission from Nomination Bar Awards

**Nominator Name**

Clifford Parkinson

**Bar Number**

13327

**Email address**

Cliff.parkinson@usu.edu

**Date**

09/13/2023

**Nominee's Name**

Kaitlyn Piper

**Award**

Community Member of the Year Award (Fall Forum)

**REFERRING TO THE AWARD CRITERIA, IN 400 WORDS OR LESS, PLEASE STATE THE REASON FOR THE NOMINATION, I.E. THE NOMINEE SHOULD RECEIVE THIS NOMINATION FOR THE FOLLOWING REASONS OR BASED UPON THE FOLLOWING FACTS OR EVENTS:**

Kaitlyn spends her days introducing underrepresented populations to the bar and explains how the Utah Center for Legal Inclusion is trying to close the gap between what the bar looks like and what the population of Utah looks like.

**Please select one:**

My nomination is public and I give permission for my nomination to be shared with the nominee and published, whole or in part, by the Utah State Bar.



### **Kaitlyn Pieper, Executive Director**

Kaitlyn Pieper is the Executive Director of the Utah Center for Legal Inclusion. Kaitlyn came to UCLI after spending time at the Salt Lake Chamber as the Director of Community Policy, where she led out on housing affordability efforts, supported rural engagement initiatives, and strengthened community partnerships. At the onset of the pandemic, she led Hope Corps' vanguard program as the liaison for minority and women-owned businesses. She is currently a Research Associate with Utah Women & Leadership Project. In previous positions, Kaitlyn has worked in translation services – both as an interpreter in the local community and as a translation manager, where she traveled globally to deliver training. She has also regularly taught university courses on world literature. Kaitlyn earned her masters degree from SOAS, University of London. She speaks five languages and enjoys people, saunas, and cycling.

**UTAH STATE BAR AWARDS COMMITTEE  
AWARD RECOMMENDATION**

**TO:** Utah State Bar Commission

**DATE:** September 22, 2023

**RE:** AWARD RECOMMENDATION – Special / Distinguished Service

**CRITERIA:**

*The Special Service Award has no specific criteria. The Award is given by the Utah State Bar Board of Bar Commissioners to recognize distinguished service to Utah State Bar or the Utah legal community and is presented to individuals who have notable Bar activity and significant professional accomplishments, including private interests, family interests, acts of heroism, charitable acts, or social accomplishments. Past recipients have given long and/or useful service to the Utah State Bar, either paid or as a volunteer.*

**NOMINEES:**

1. Beth Parker
2. Heather Tanana

**PAST RECIPIENTS:**

2001	WAINE C. RICHES
2002	KENT B. SCOTT
2002	REP. AFTON B. BRADSHAWP
2002	REP. A. LAMONT TYLER
2003	HON. LEONARD H. RUSSON
2003	DEAN W. SHEFFIELD
2003	ELAINA MARAGAKIS
2003	GARY G. SACKETT
2005	UTAH MINORITY BAR ASSOCIATION
2006	S. J. QUINNEY COLLEGE OF LAW
2007	G. STEVEN SULLIVAN
2008	DAVID R. HALL
2012	HON. DAVID R. HAMILTON
	HON. DAVID O. NUFFER
	SAMUEL ALBA
	STEVEN T. WATERMAN
2014	YOUNG LAWYERS DIVISION
2017	HON. CHRISTINE M. DURHAM
2019	ROBERT W. ADLER
	STEVEN G. JOHNSON
2020	RICHARD MAURO & SALT LAKE LEGAL DEFENDER ASSOC.
2022	NOELLA SUDBURY
	DEBRA M. NELSON

**RECOMMENDATION:**

The Utah State Bar Awards Committee met on September 20, 2023 and voted to recommend Heather Tanana for a Special Service Award.



**Christy Abad**

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**From:** info@utahbar.org <webhost@utahbar.org>  
**Sent:** Wednesday, September 13, 2023 9:57 PM  
**To:** Christy Abad  
**Subject:** New submission from Nomination Bar Awards

**Nominator Name**

Cliff Parkinson

**Bar Number**

13327

**Email address**

Cliff.parkinson@usu.edu

**Date**

09/13/2023

**I The Above, Desire to Nominate the Following**

Utah State Bar Member

**Nominee's Name**

Heather Tanana

**Award**

Special Service Award (When Warranted)

**REFERRING TO THE AWARD CRITERIA, IN 400 WORDS OR LESS, PLEASE STATE THE REASON FOR THE NOMINATION, I.E. THE NOMINEE SHOULD RECEIVE THIS NOMINATION FOR THE FOLLOWING REASONS OR BASED UPON THE FOLLOWING FACTS OR EVENTS:**

Co-authored an amicus brief in support of Navajo Nation with her colleague Beth Parker and others i the Supreme Court case Arizona v Navajo Nation.

**Please select one:**


My nomination is public and I give permission for my nomination to be shared with the nominee an published, whole or in part, by the Utah State Bar.




**Adjunct Assistant Professor**, Pediatrics

**Research Assistant Professor**, College Of Law - Dean

 [Curriculum Vitae \(/bytes/curriculumVitae.html?id=u0174603\)](/bytes/curriculumVitae.html?id=u0174603)

 [tananah@law.utah.edu](mailto:tananah@law.utah.edu) (mailto:tananah@law.utah.edu)

 801-585-0480

## Education

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B.A., Biology modified with Psychology, Dartmouth College

J.D., Law, University of Utah - S.J. Quinney College of Law. Project: Certificate in Environmental and Natural Resources Law

M.P.H., Public Health, Johns Hopkins University - Bloomberg School of Public Health. Project: Certificate in American Indian Health

## Biography

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Heather Tanana, JD, MPH (Diné) is an Assistant Professor (Research) & Wallace Stegner Center Fellow at the S.J. Quinney College of Law. Heather is experienced in state, federal, and tribal courts and clerked at the U.S. District Court for the District of Utah. She also founded the Indian Law Section of the Utah State Bar Association. In recognition of her work related to Tribal communities, the environment, and public health, Heather has received recognition and awards from the Natural Resources & Environmental Law Section of the Utah State bar, the Utah Minority Bar Association, and the Environment, Energy, and Resources Section of the American Bar Association.

Heather is also Associate Faculty at the Johns Hopkins Center for Indigenous Health, where she works with the Center's Training team on developing and teaching Institute courses and collaborates on health policy related work. She holds a Master of Public Health from the Bloomberg School of Public Health - Johns Hopkins University, where she was inducted into the Delta Omega Public Health Honorary Society.

Heather's research interests include exploring the overlay between environmental and health policy, promoting better practices in Indian child welfare, and criminal justice in Indian Country. She sits on the boards of the Urban Indian Center of Salt Lake and Western Resource Advocates. She also volunteers her time on other working groups to promote diversity in the legal field, including the Foundation for Natural Resources and Energy Law - Diversity and Inclusion Task Force, Association of American Law Schools - Section on Indian Nations and Indigenous Peoples, and ABA Native American Resources Committee.

**HEATHER J. TANANA**

Assistant Professor of Law (Research) & Wallace Stegner Center Fellow  
 S.J. Quinney College of Law – University of Utah  
 (801) 809-0059 • heather.tanana@law.utah.edu

**EDUCATION**

**Johns Hopkins University – Bloomberg School of Public Health**, Baltimore, Maryland  
*Masters of Public Health*, May 2012

- Certificate in American Indian Health

**University of Utah – S.J. Quinney College of Law**, Salt Lake City, Utah  
*Juris Doctor*, May 2010

- Certificate in Environmental and Natural Resources Law

**Dartmouth College**, Hanover, New Hampshire  
*Bachelor of Arts – Biology modified with Psychology*, June 2004

**ACADEMIC EXPERIENCE**

**Johns Hopkins University – Bloomberg School of Public Health**, Baltimore, Maryland  
**Center for American Indian Health**  
*Associate Faculty*, January 2015 – Present

**University of Utah – S.J. Quinney College of Law**, Salt Lake City, Utah  
**Wallace Stegner Center**  
*Assistant Professor of Law (Research)*, June 2019 – Present

**University of Utah**, Salt Lake City, Utah  
**Institute of Clean & Secure Energy**  
*Legal Research Fellow*, September 2010 – October 2011

**LEGAL EXPERIENCE**

**U.S. District Court, District of Utah**, Salt Lake City, Utah  
*Law Clerk for U.S. District Court Judge David Nuffer*, May 2018 – June 2019

**Richards Brandt Miller Nelson**, Salt Lake City, Utah  
*Shareholder*, June 2013 – May 2018

**Mohrman & Schofield PC**, Salt Lake City, Utah  
*Associate Attorney*, April 2012 – May 2013

**PROFESSIONAL LICENSES**

**Navajo Nation Bar**, 2014

**Utah State Bar**, 2010

- Utah Minority Bar Association, Jimi Mitsunaga Excellence in the Law Award (2020)
- Energy, Natural Resources & Environmental Law Section Lawyer of the Year (2020)

- Led formation of Indian Law Section of the Utah State Bar in 2016 and served as Section Chair from 2016 – 2017.
- Currently serve as Chair of Indian Child Welfare Act Committee under the Indian Law Section.

#### **U.S. District Court for the District of Utah, 2010**

#### **GRANT ACTIVITY**

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##### **Reproductive Scientist Development Program (RSDP) 2020-2021**

- Role: Consultant
- Funder: University of Missouri-Columbia

##### **Multi-Level Interventions for Increasing Tobacco Cessation at FQHCs**

- Role: Co-Investigator
- Funder: Patient-Centered Outcomes Research Institute

##### **Community-Academic Partnership to Address COVID-19 Among Utah Community Health Centers**

- Role: Co-Investigator
- Funder: National Institute of Health

#### **SERVICE**

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##### **Association of American Law Schools, 2021 – Present**

- Treasurer, Section on Indian Nations and Indigenous Peoples

##### **American Bar Association, 2020 – Present**

- Communications Co-Chair, Native American Resources Committee, Environment, Energy & Resources Section

##### **Rocky Mountain Mineral Law Foundation, 2020 – Present**

- Member of Diversity and Inclusion Task Force

##### **Urban Indian Center of Salt Lake, October 2019 – Present**

- Chair and Board member

##### **Utah Tribal Relief Foundation, April 2020 – Present**

- Founder and President

##### **University of Utah, 2021**

- Search committee member for Grant Development Specialist (Associate Director/Research Manager)

##### **Robert Wood Johnson Foundation, 2021**

- Invited reviewer for grant proposals

## PUBLICATIONS

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- Heather Tanana and John Ruple, *Synching Science and Policy to Address Climate Change in Tribal Communities*, \_\_\_ *Natural Resources & Environment* \_\_\_ (forthcoming 2021).
- Elizabeth Warner Kronk and Heather Tanana, *Indian Country Post-McGirt: Implications for Traditional Energy Development and Beyond*, *Harvard Envtl. Law Review* (forthcoming 2021).
- Elizabeth Warner Kronk and Heather Tanana, *Tribes and Climate Change*, *ELI Climate Change* (forthcoming 2021).
- Heather Tanana, Nancy Lucero, and Alisa Lee, *ICWA Chapter, Child Welfare Compendium* (forthcoming 2021).
- Water & Tribes Initiative, *Universal Access to Clean Water for Tribes in the Colorado River Basin* (lead author) (2021).
- Heather Tanana and Aila Hoss, *Beyond the Pandemic: Historical Infrastructure, Funding, and Data Access Challenges in Indian Country*, *Public Health Law Watch* (2021).
- John Ruple and Heather Tanana, *NEPA at 50: An Empirical Analysis of NEPA in the Courts*, 66 *Rocky Mnt. Min. L. Inst.* 10 (2020).
- Heather Tanana, *Learning from the Past and the Pandemic to Address Mental Health in Tribal Communities*, *Arizona State Law Online Journal* (2020).
- Aila Hoss and Heather Tanana, *Upholding Tribal Sovereignty and Promoting Tribal Public Health Capacity During the COVID-19 Pandemic*, *Public Health Law Watch* (2020).
- Robin Craig, John Ruple, Heather Tanana, and Connor Arrington, *Pakistan Water Management, The Legal and Institutional Framework: Lessons Learned and Opportunities for Improvement*. University of Utah (2020).
- John C. Ruple and Heather J. Tanana, *Debunking the Myths Behind the NEPA Process*, 35 *Natural Resources & Environment* 1 (2020).
- John C. Ruple and Heather J. Tanana, *Beyond the Antiquities Act: Can the BLM Reconcile Energy Dominance and National Monument Protection?* 34 *Natural Resources & Environment* 3 (2019).
- Annalise John, J. Dena Ned, and Heather Tanana, *Adoption In J. Dena Ned, Caren J. Frost (Eds.), Contemporary Issues in Child Welfare: American Indian and Canadian Aboriginal Contexts* (2017).
- Heather J. Tanana and John C. Ruple, *Energy Development in Indian Country: Working Within the Realm of Indian Law and Moving Towards Collaboration*, 32 *Utah Envtl. L. Rev.* 1 (2012).
- Lincoln Davies, Kirsten Uchitel, John Ruple, and Heather Tanana, *Carbon Capture and Sequestration: A Regulatory Gap Assessment*. University of Utah (2012)
- Robert B. Keiter, John Ruple, Heather Tanana, and Michelle Kline, *Land and Resource Management Issues Relevant to Deploying In-Situ Thermal Technologies*. University of Utah (2011).

## PRESENTATIONS

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- American Planners Association, *Tribal Access to Clean Water: Public Health Emergency* (May 5, 2021)

- American Bar Association, Environmental Law Conference, Wildfire and Other Disasters: Lessons and Opportunities from Tribal Resource Management (moderator) (April 29, 2021).
- Northeastern State University, Symposium of the American Indian, NEPA: What is it and why should I care? (April 13, 2021).
- University of Utah, SURGE, Leaders in Rural & Native Health Panel (April 9, 2021).
- University of Denver – Sturm College of Law, Environmental Justice & Water Panel (March 5, 2021).
- Arizona State University, Academy for Justice Symposium: COVID-19 and Vulnerable Populations (December 14, 2020).
- S.J. Quinney College of Law, Law Review Symposium: The Law & Ethics of Medical Research, Medical Research as Public Health Initiative (November 20, 2020).
- U.S. District Court for the District of Utah, The POWER Act: How You Can Make a Difference (September 29, 2020).
- S.J. Quinney College of Law, COVID-19 and its Impacts in Indian Country (September 24, 2020).
- State of Reform, COVID through a Health Equity Lens (September 15, 2020)
- The Network for Public Health Law, COVID-19 in Indian Country: Past Policy, Current Responses, and Future Implications (August 18, 2020)
- U.S. District Court for the District of Utah, Five Things You Need to Know When Dealing with a Member of the Navajo Nation (November 22, 2019).
- Utah State Bar, Indian Law Section CLE, Domestic Violence in Native Communities (November 18, 2019).
- U.S. Attorney’s Offices for the Districts of Colorado, New Mexico, Arizona, and Utah, 27th Annual Four Corners Indian Country Conference, The Pro Bono Work to Empower and Represent Act of 2018 (September 24, 2019).
- University of Utah, School of Social Work, SW 6301: Advance Social Work Practice in Child Welfare, Guest Lecturer (Fall 2018; Fall 2019).
- Navajo Nation Bar Association, Bar Review Course, Domestic Relations (July 2019).
- Utah State Bar, Special Considerations When Divorcing Tribal Members (January 29, 2019).
- Navajo Nation Bar Association, Bar Review Course, Indian Child Welfare Act and Áłchíní Bi Beehaz’áannii Act (August 2018).
- National Business Institute, Handling Divorce Cases from Start to Finish (October 17, 2017).
- Navajo Nation Bar Association, Annual Conference, Indian Child Welfare Act: The New Regulations (June 8, 2017).
- National Business Institute, Advanced Issues in Family and Divorce Law (June 9-10, 2016).
- State of Utah, 4th Annual Indian Child Welfare Act Conference, ICWA & Private Adoptions (May 6, 2015).
- Richards Brandt Miller Nelson, Understanding the Indian Child Welfare Act (October 8, 2015).
- National Business Institute, Negotiating Contracts on Tribal Lands (May 6, 2015).

- U.S. E.P.A., Strengthening Environmental Justice and Decision Making: A Symposium on the Science of Disproportionate Environmental Health Impacts, The Breakdown of Federal Protections: How Environmental Health Policy Set at the National Level Can Be Derailed at the State Level (March 18, 2010).

## **MEDIA**

- Arizona Public Media, New report looks into water insecurity in tribal lands across Colorado River Basin (Apr. 30, 2021), available at <https://news.azpm.org/p/news-articles/2021/4/30/193923-new-report-looks-into-water-insecurity-in-tribal-lands-across-colorado-river-basin/>.
- Albuquerque Journal, Clean water access urgent for Indigenous tribes (Apr. 29, 2021), available at <https://www.abqjournal.com/2385440/clean-water-access-urgent-for-indigenous-tribes-ex-limits-to-such-access-can-double-or-triple-covid-infection-rates.html>.
- Inside Climate News, The pandemic exposed the severe water insecurity faced by southwestern tribes (Apr. 29, 2021), available at <https://insideclimatenews.org/news/29042021/the-pandemic-exposed-the-severe-water-insecurity-faced-by-southwestern-tribes/>.
- Boulder Weekly, Tribal leaders engage Colorado Senator Bennet to ensure universal access to clean water on reservations (Jan. 14, 2021), available at <https://www.boulderweekly.com/news/tribal-leaders-engage-colorado-senator-bennet-to-ensure-universal-access-to-clean-water-on-reservations/>.
- ABC4 News, Dozens of Volunteer Pilots Help Deliver 19,000 lbs of Essential Supplies to Navajo Nation (June 3, 2020), available at <https://www.abc4.com/news/community-over-crisis/dozens-of-volunteer-pilots-help-deliver-19000-lbs-of-essential-supplies-to-navajo-nation/>.
- STAT News, As Covid-19 Tears through Navajo Nation, Young People Step Up to Protect Their Elders (May 26, 2020), available at <https://www.statnews.com/2020/05/26/navajo-nation-covid-19-youth-response-elders-health/>.
- Deseret News Utah Lawyers Rally Help for Hard-Hit Navajo Nation, (May 17, 2020), available at <https://www.deseret.com/utah/2020/5/17/21258809/pandemic-coronavirus-covid-19-aid-navajo-nation-utah-reservations-lawyers>.
- KUER NPR Utah, Bears Ears and Grand Staircase Management Plans Likely Illegal, Legal Researchers Say, (Feb. 14, 2020), available at <https://www.kuer.org/post/bears-ears-and-grand-staircase-management-plans-likely-illegal-legal-researchers-say#stream/0>.



**TAB**  
**3**

## UTAH STATE BAR COMMISSION MEETING

### MINUTES

Thursday, August 17, 2023

**In Attendance:** President Erik Christiansen, and Commissioners J. Brett Chambers, Matt Hansen, Greg Hoole, Mark Morris, Shawn Newell, and John Rees.

**Ex-Officio Members:** Anaya Gayle, Tony Graf, Dean Elizabeth Kronk-Warner, and Dean David Moore.

**Not in Attendance:** Commissioners Chrystal Mancuso-Smith, Kim Cordova, Traci Gunderson, Cara Tangaro, Tyler Young, Tom Bayles, and Rick Hoffman, and Ex-Officio members Ashley Beihl, Camila Moreno, Katie Lawyer, Kristin Woods, Lauren Shurman, Margaret Plane, and Nathan Adler.

**Also in Attendance:** Executive Director Elizabeth A. Wright, Assistant Executive Director Brooke Muir, General Counsel Maribeth LeHoux, Utah Court Representative Nick Stiles, Utah Legal Services Innovation Office Program Director Andrea Donahue.

#### 1. President's Welcome and Reports

##### 1.1 Introduction of New Bar Staff

Elizabeth Wright introduced the new bar staff to the commissions: Nathan Severin, director of finance, Andrea Donahue, director of the Office of Legal Services Innovation, Maribeth LeHoux, general counsel, and Brooke Muir, assistant executive director.

##### 1.2 Jeannine Timothy Retirement

Ms. Wright acknowledged Jeannine Timothy for her 26 years of service to the Consumer Assistance Program.

##### 1.3 Retreat

Mr. Christiansen reminded the Commission of the retreat September 22-23 and discussed the agenda and topics for the retreat.

##### 1.4 Report on National Conference of Bar Presidents and ABA Annual Meeting

Mr. Christiansen reported from the NCBP and the trends discussed at the conference, particularly for younger lawyers, the role of AI in the profession, and mentorship within the bar. From the ABA meeting, Mr. Christiansen discussed the goals and focus of the new ABA president, as well as the growth of affinity bars. Ms. Wright discussed topics from the National Bar Executives meetings.

##### 1.5 ABA House of Delegates' Meeting

This agenda item was skipped.

#### 2. Information Items

##### 2.1 Bar Building Improvement Updates

Ms. Wright provided an update on the improvements at the Utah Law & Justice Center, including updates to the bathrooms and replacing the skylight.

## **2.2 Admissions Updates: Emily Lee**

Ms. Lee provided an update on the July bar exam, including test accommodations. She discussed the process of grading and put out a call for graders. The admissions ceremony in October will be at the Salt Palace at noon on October 27, 2023. She discussed the NCBE's new NextGen bar exam, which will be available in 2026, as well as the proposal for alternative paths to licensure. The Commission discussed the changes to the exam, including the new cut score.

## **2.3 War Stories Videos: Bruce Baird**

Mr. Baird discussed his project of recording local attorney's stories, and the concept of conducting similar interviews and recordings with additional attorneys. He suggested a working group to come up with a plan/budget to make more videos and which could be run as CLEs. Mr. Christiansen suggested Mr. Baird put together a proposal, including any funding requests.

## **3. Action Items**

### **3.1 Appoint Commission Ex-officio Members: Erik Christiansen**

Mr. Christiansen discussed the ex-officio member appointments.

Mr. Morris moved to recommend the proposal and Mr. Hoole seconded. The motion passed unanimously.

### **3.2 Appoint Committee Chairs: Erik Christiansen**

Mr. Christiansen discussed the appointment of committee chairs.

Mr. Hansen moved to recommend the proposal and Mr. Chambers seconded. The motion passed unanimously.

### **3.3 Appoint Commission Liaisons: Erik Christiansen**

Mr. Christiansen discussed the commission liaisons for the committees.

Mr. Newell moved to recommend the proposal and Mr. Hansen seconded. The motion passed unanimously.

### **3.4 Reappoint Erik Christiansen as Bar ABA Delegate**

Mr. Christiansen discussed the Bar ABA delegate role, and recused himself for debate and voting.

Mr. Hansen moved to recommend the proposal and Mr. Morris seconded. The motion passed unanimously.

### **3.5 Purchase Table for Legal Aid Society Gala**

The Commission discussed the upcoming Legal Aid Society Gala on September 8, 2023, and purchasing a table for \$1500.

Mr. Morris moved to recommend the proposal and Mr. Hoole seconded. The motion passed unanimously.

#### **4. Information Items**

##### **4.1 Utah Court's Common Thread Program: Jonathan Puente**

Mr. Puente, from the Office of Fairness and Accountability in Utah Court, presented on Common Thread. Common Thread acts as a pipeline to help diversify the bench. This year, they are hosting a welcome event for law students on September 14<sup>th</sup> in Park City. The program is chaired by Judge Gibson.

#### **5. Executive Session**

The Commission held an executive session.

#### **6. Adjournment.**

The Commission adjourned at 11:40 am.

#### **7. Consent Agenda.**

The Commission noted that the following items would be voted on via email:

- Approve 2022-2023 committee charges
- Approve bar 401(k) trustee changes
- Approve minutes of June 9, 2023 commission meeting
- Approve fund for client protection report and recommendations

# TAB 4

**UTAH STATE BAR**  
**Budget and Finance Committee**  
**Financial Results as of August 31, 2023**  
**and for the two months then ended**

**FINANCIAL STATEMENT HIGHLIGHTS**

**Year-to-Date (YTD) Net Profit – Accrual Basis:**

	<b>Actual</b>	<b>Budget</b>	<b>Fav (unfav) \$ Variance</b>	<b>Fav (unfav) % Variance</b>
YTD revenue	4,774,442	4,950,554	(176,112)	-4%
YTD expenses	1,423,228	1,336,981	(86,247)	-6%
<b>YTD net profit/(loss)</b>	<b>3,351,214</b>	<b>3,613,573</b>	<b>(262,359)</b>	<b>-7%</b>

YTD net profit is \$3,351,214 and is \$262,359 less than budgeted. To follow July's results, it must be noted that August also maintained unfavorable results between both revenues and expenses. YTD Section Event losses will not start allocating to their respective sections until October, which accounts for some of the unfavorable variance among expenses.

**YTD Net Profit –Cash Basis:** Adding back year-to-date depreciation expense of \$23,476 and deducting capital expenditures of \$66,766, the cash basis year-to-date net profit is approximately \$(43,290) lower.

**Explanations for Departments with Net Profit Variances more than \$10k and 5% Over/Under Budget:**

**Admissions:** Admissions is currently reporting a \$49,934 favorable variance compared to the budget. Budgeted revenues are favorable \$12,183 across all revenue streams, expenses are favorable by \$28,337.

**NLTP:** NLTP revenues are at 135% of the budgeted figures, and expenses are favorable at 70% of budget among all three functional expenses categories.

**OPC:** Expenses allocated to OPC are \$10,093 more than budgeted YTD, 108% of total. Travel expenses related to conferences and higher General & Administrative costs contributed to this overage.

**CLE:** CLE is reporting a \$(3,537) net loss compared to the budgeted net profit of \$17,604 which is a \$(21,141) unfavorable variance. Revenues have caught up from July, turning positive, but all expenses come in at \$149% of budget, related mostly to Program Services. These expenses will be offset as profits/losses are allocated as Section Events start closing over the next few months.

**Summer Convention:** The Summer Convention shows a net profit of \$28,938 YTD. However, there is a \$29,000 shortfall of sponsor revenue compared to budget, a likely result of the online series. Total expenses are right on target.

**Member Services:** YTD Revenue is \$(33,948), or 60%, less than budgeted. All expenses remain at just 59% less than budgeted, though. The net of this results in a \$(18,223) unfavorable variance YTD.

**Public Services:** Fiscal year 2024 budgeted grant revenue of \$109,539, which required recognition in fiscal year 2023. This was recognized as required, and thus understates revenues at only 18% of budget YTD. Total expenses are over budget by \$13,757, or 8%.

**UTAH STATE BAR**  
**Budget and Finance Committee**  
**Financial Results as of August 31, 2023**  
**and for the two months then ended**

**Bar Operations:** Bar Operations has seen an 11% overspend among budgeted expenses. Netted against a favorable investment income, the net loss of \$(17,032) is 5% over budget YTD.

**Facilities:** A combination of rental revenues being at 77% YTD, or \$(4,957) less than budgeted, and overspend for Program Services, a net loss of \$(19,418) is being recognized YTD.

**LSI:** Grant Income shall be retroactively recognized after payment is received for partial funding of this new department. This budget is in line otherwise.

**ADDITIONAL COMMENTS**

**Board Designated Reserves:** In consultation with Bar management and the Budget & Finance Committee, the Commission informally targeted the following reserve amounts:

Operations Reserve - 4 Months' Operations	\$2,699,823
Capital Replacement Reserve - Equipment	200,000
Capital Replacement Reserve - Building	600,000
Technology/Contracts Reserve - Database & Tava Contracts	378,000
Total	\$3,877,823
Estimated cash reserve as of August 31, 2023	<u>\$3,884,594</u>
Excess of current cash reserve exceeding board-designated reserve	<u>\$ 6,771</u>

## Utah State Bar Income Statement August 31, 2023

	Actual LYTD	Actual YTD	Budget YTD	Fav (Unfav) variance	% of Budget	Total Budget	YTD % of Tot Budget
<b>Revenue</b>							
Licensing	4,374,925	4,438,085	4,511,338	(73,253)	98%	4,968,948	89%
Admissions	32,285	40,695	37,559	3,136	108%	641,787	6%
NLTP	4,800	9,600	5,800	3,800	166%	61,899	16%
OPC	-	600	-	600		38,800	2%
CLE	67,954	77,114	83,667	(6,553)	92%	818,011	9%
Summer Convention	127,325	51,052	85,000	(33,948)	60%	85,000	60%
Fall Forum	-	6,900	-	6,900		72,792	9%
Spring Convention	-	(150)	-	(150)		119,200	0%
Member Services	35,675	62,153	41,926	20,228	148%	344,881	18%
Public Services	2,100	19,906	111,860	(91,954)	18%	113,303	18%
Bar Operations	32,420	52,055	30,515	21,540	171%	194,716	27%
Facilities	14,811	16,432	21,389	(4,957)	77%	210,806	8%
Innovation in Law	-	-	21,500	(21,500)	0%	129,000	0%
Total Revenue	4,692,296	4,774,442	4,950,554	(176,112)	96%	7,799,143	61%
<b>Expenses</b>							
Licensing	45,297	61,651	53,305	(8,346)	116%	277,027	22%
Admissions	160,247	120,762	167,560	46,798	72%	522,602	23%
NLTP	11,243	9,602	15,225	5,623	63%	85,054	11%
OPC	265,024	292,380	278,037	(14,343)	105%	1,693,689	17%
CLE	53,422	80,651	66,063	(14,589)	122%	781,283	10%
Summer Convention	261,191	22,654	38,378	15,725	59%	42,623	53%
Fall Forum	170	5,645	170	(5,475)	3321%	72,793	8%
Spring Convention	-	11	-	(11)		119,199	0%
Member Services	99,157	177,291	124,188	(53,103)	143%	1,051,348	17%
Public Services	150,122	184,704	170,947	(13,757)	108%	809,793	23%
Bar Operations	349,536	382,158	343,587	(38,571)	111%	2,113,518	18%
Facilities	44,157	71,843	57,383	(14,461)	125%	397,705	18%
Innovation in Law	-	13,875	22,139	(8,264)	63%	132,835	10%
Total Expenses	1,439,567	1,423,228	1,336,981	(86,247)	106%	8,099,469	18%
<b>Other</b>							
<b>Net Profit (Loss)</b>	<b>\$ 3,252,728</b>	<b>\$ 3,351,213.99</b>	<b>\$ 3,613,573</b>	<b>\$ (262,359)</b>	<b>93%</b>	<b>\$ (300,326)</b>	<b>-1116%</b>
Depreciation	21,623	24,066	25,847	1,781	93%	158,246	
Cash increase (decrease) from operations	3,274,351	3,375,280	3,639,420	(264,140)	93%	(142,080)	
Changes in operating assets/liabilities	(2,283,442)	(3,028,580)	(3,028,580)	-	100%	20,000	
Capital expenditures	(80,967)	(249,162)	(16,667)	(232,495)	1495%	(157,000)	
<b>Net change in cash</b>	<b>\$ 909,942</b>	<b>\$ 97,537</b>	<b>\$ 594,173</b>	<b>\$ (496,635)</b>	<b>16%</b>	<b>\$ (279,080)</b>	<b>-35%</b>



# Utah State Bar Licensing August 31, 2023

	Actual LYTD	Actual YTD	Budget YTD	Fav (Unfav) variance	% of Budget	Total Budget	YTD % of Tot Budget
<b>Revenue</b>							
4010 · Section/Local Bar Support fees	-	-	-	-	-	17,662	0%
4004 · Admissions - Laptop Fees	230	-	235	(235)	0%	235	0%
4006 · Transfer App Fees	-	-	-	-	-	2,500	0%
4011 · Admissions LPP	-	-	-	-	-	3,967,112	96%
4021 · Lic Fees > 3 Years	3,751,580	3,804,600	3,844,404	(39,804)	99%	-	0%
4020 · NLTP Fees	-	-	-	-	-	235,702	69%
4022 · Lic Fees < 3 Years	146,550	163,470	167,554	(4,084)	98%	62,149	90%
4023 · Lic Fees - House Counsel	50,135	55,875	55,710	165	100%	222,539	15%
4025 · Pro Hac Vice Fees	32,350	34,425	33,755	670	102%	5,202	89%
4024 · Lic Fees LPP	3,400	4,625	4,001	625	116%	123,058	96%
4026 · Lic Fees - Inactive/FS	121,380	118,650	124,634	(5,984)	95%	229,337	94%
4027 · Lic Fees - Inactive/NS	219,030	215,775	224,229	(8,454)	96%	-	0%
4029 · Prior Year Lic Fees	-	2,820	4,054	(1,234)	70%	23,338	12%
4030 · Certs of Good Standing	3,460	-	-	-	-	143	0%
4061 · Advertising Revenue	-	-	-	-	-	204	0%
4081 · CLE - Registrations	10	95	4	91	2375%	67	142%
4095 · Miscellaneous Income	46,800	37,750	52,758	(15,008)	72%	79,700	47%
4096 · Late Fees	-	-	-	-	-	-	-
<b>Total Revenue</b>	<b>4,374,925</b>	<b>4,438,085</b>	<b>4,511,338</b>	<b>(73,253)</b>	<b>98%</b>	<b>4,968,948</b>	<b>89%</b>
<b>Expenses</b>							
Program Services	14,843	11,650	14,854	3,204	78%	29,405	-
Salaries & Benefits	23,225	19,773	23,122	3,349	86%	118,727	17%
General & Administrative	5,329	28,135	13,298	(14,837)	212%	116,365	24%
Building Overhead	1,900	2,093	2,031	(62)	103%	12,530	17%
Total Expenses	45,297	61,651	53,305	(8,346)	116%	277,027	22%
<b>Net Profit (Loss)</b>	<b>\$ 4,329,628</b>	<b>\$ 4,376,434</b>	<b>\$ 4,458,032</b>	<b>\$ (81,599)</b>	<b>98%</b>	<b>\$ 4,691,921</b>	<b>93%</b>

Note: Includes LPP staff time and exam expense

# Utah State Bar Admissions August 31, 2023

	Actual LYTD	Actual YTD	Budget YTD	Fav (Unfav) variance	% of Budget	Total Budget	YTD % of Tot Budget
<b>Revenue</b>							
4001 · Admissions - Student Exam Fees	-	(275)	-	(275)		146,472	0%
4002 · Admissions - Attorney Exam Fees	2,550	1,700	3,076	(1,376)	55%	71,069	2%
4003 · Admissions - Retake Fees	-	-	-	-		39,729	0%
4004 · Admissions - Laptop Fees	1,000	400	1,545	(1,145)	26%	100,894	0%
4005 · Admissions - Application Forms	-	1,000	-	1,000		7,599	13%
4006 · Transfer App Fees	11,900	6,350	15,937	(9,587)	40%	69,972	9%
4008 · Attorney - Motion	10,200	26,350	9,881	16,469	267%	141,219	19%
4009 · House Counsel	5,950	4,250	6,405	(2,155)	66%	32,028	13%
4011 · Admissions LPP	-	17	17	(17)	0%	102	0%
4095 · Miscellaneous Income	685	920	698	222	132%	5,947	15%
4096 · Late Fees	-	-	-	-		26,900	0%
4200 · Seminar Profit/Loss	-	-	-	-		(144)	0%
<b>Total Revenue</b>	<b>32,285</b>	<b>40,695</b>	<b>37,559</b>	<b>3,136</b>	<b>108%</b>	<b>641,787</b>	<b>5%</b>
<b>Expenses</b>							
Program Services	89,507	44,035	93,176	49,141	47%	143,133	31%
Salaries & Benefits	52,349	58,720	56,417	(2,303)	104%	275,322	21%
General & Administrative	15,023	14,295	14,370	75	99%	81,930	17%
Building Overhead	3,369	3,712	3,597	(115)	103%	22,217	17%
<b>Total Expenses</b>	<b>160,247</b>	<b>120,762</b>	<b>167,560</b>	<b>46,798</b>	<b>72%</b>	<b>522,602</b>	<b>23%</b>
<b>Net Profit (Loss)</b>	<b>\$ (127,962)</b>	<b>\$ (80,067)</b>	<b>\$ (130,001)</b>	<b>\$ 49,934</b>	<b>62%</b>	<b>\$ 119,185</b>	<b>-67%</b>

**Utah State Bar  
NLTP  
August 31, 2023**

	Actual LYTD	Actual YTD	Budget YTD	Fav (Unfav) variance	% of Budget	Total Budget	YTD % of Tot Budget
<b>Revenue</b>							
4020 · NLTP Fees	4,800	9,600	5,733	3,867	167%	62,883	15%
4081 · CLE - Registrations	-	-	-	-	-	-	0%
4095 · Miscellaneous Income	-	-	67	(67)	0%	404	0%
4096 · Late Fees	-	-	-	-	-	(1,388)	0%
4200 · Seminar Profit/Loss	-	-	-	-	-	61,899	16%
<b>Total Revenue</b>	<b>4,800</b>	<b>9,600</b>	<b>5,800</b>	<b>3,800</b>	<b>166%</b>		
<b>Expenses</b>							
Program Services	-	-	950	950	0%	5,700	0%
Salaries & Benefits	7,451	5,795	9,110	3,315	64%	49,636	12%
General & Administrative	3,073	3,017	4,401	1,384	69%	24,982	12%
Building Overhead	718	791	764	(27)	104%	4,736	17%
<b>Total Expenses</b>	<b>11,243</b>	<b>9,602</b>	<b>15,225</b>	<b>5,623</b>	<b>63%</b>	<b>85,054</b>	<b>11%</b>
<b>Net Profit (Loss)</b>	<b>\$ (6,443)</b>	<b>\$ (2)</b>	<b>\$ (9,425)</b>	<b>\$ 9,422</b>	<b>0%</b>	<b>\$ (23,155)</b>	<b>0%</b>

**Utah State Bar  
OPC  
August 31, 2023**

	Actual LYTD	Actual YTD	Budget YTD	Fav (Unfav) variance	% of Budget	Total Budget	YTD % of Tot Budget
<b>Revenue</b>							
4095 · Miscellaneous Income	-	600	-	600		5,000	12%
4200 · Seminar Profit/Loss	-	-	-	-		33,800	0%
Total Revenue	-	600	-	600		38,800	2%
<b>Expenses</b>							
Program Services	1,729	3,618	1,458	(2,160)	248%	13,235	27%
Salaries & Benefits	228,274	251,251	240,697	(10,554)	104%	1,418,860	18%
General & Administrative	22,533	23,753	22,546	(1,207)	105%	179,240	13%
Building Overhead	12,488	13,758	13,336	(422)	103%	82,354	17%
Total Expenses	265,024	292,380	278,037	(14,343)	105%	1,693,689	17%
<b>Net Profit (Loss)</b>	<b>\$ (265,024)</b>	<b>\$ (291,780)</b>	<b>\$ (278,037)</b>	<b>\$ (13,743)</b>	<b>105%</b>	<b>\$ (1,654,889)</b>	<b>18%</b>

# Utah State Bar CLE August 31, 2023

**Revenue**  
 4051 · Meeting - Registration  
 4052 · Meeting - Sponsor Revenue  
 4053 · Meeting - Vendor Revenue  
 4054 · Meeting - Material Sales  
 4055 · Meeting - Sp Ev Registration  
 4081 · CLE - Registrations  
 4082 · CLE - Video Library Sales  
 4083 · CLE - Material Sales  
 4084 · Business Law Book Sales  
 4093 · Law Day Revenue  
 4095 · Miscellaneous Income  
 4200 · Seminar Profit/Loss  
 Total Revenue

**Expenses**  
 Program Services  
 Salaries & Benefits  
 General & Administrative  
 Building Overhead  
 Total Expenses

Actual LYTD	Actual YTD	Budget YTD	Fav (Unfav) variance	% of Budget	Total Budget	YTD % of Tot Budget
-	-	-	-	-	-	-
-	-	-	-	-	43,700	0%
-	-	250	(250)	0%	1,500	0%
-	-	-	-	-	-	-
-	-	-	-	-	-	-
41,903	63,352	41,382	21,970	153%	448,577	14%
26,051	13,763	42,035	(28,273)	33%	233,106	6%
-	-	-	-	-	-	-
-	-	-	-	-	-	-
-	-	-	-	-	2,952	0%
-	-	-	-	-	100	0%
-	-	-	-	-	88,076	0%
67,954	77,114	83,667	(6,553)	92%	818,011	9%
17,550	42,283	24,473	(17,811)	173%	528,380	8%
26,778	24,508	32,295	7,787	76%	171,075	14%
6,612	11,513	6,684	(4,829)	172%	66,911	17%
2,482	2,346	2,611	265	90%	14,917	16%
53,422	80,651	66,063	(14,589)	122%	781,283	10%
<b>\$ 14,533</b>	<b>\$ (3,537)</b>	<b>\$ 17,604</b>	<b>\$ (21,141)</b>	<b>-20%</b>	<b>\$ 36,728</b>	<b>-10%</b>

## Utah State Bar Summer Convention August 31, 2023

	Actual LYTD	Actual YTD	Budget YTD	Fav (Unfav) variance	% of Budget	Total Budget	YTD % of Tot Budget
<b>Revenue</b>							
4051 · Meeting - Registration	82,125	50,052	55,000	(4,948)	91%	55,000	91%
4052 · Meeting - Sponsor Revenue	32,700	1,000	15,000	(14,000)	7%	15,000	7%
4053 · Meeting - Vendor Revenue	11,300	-	15,000	(15,000)	0%	15,000	0%
4054 · Meeting - Material Sales	-	-	-	-	-	-	-
4055 · Meeting - Sp Ev Registration	1,200	-	-	-	-	-	-
4095 · Miscellaneous Income	-	-	-	-	-	-	-
Total Revenue	127,325	51,052	85,000	(33,948)	60%	85,000	60%
<b>Expenses</b>							
Program Services	251,904	20,663	27,107	6,444	76%	27,107	76%
Salaries & Benefits	2,022	559	3,996	3,437	14%	3,996	14%
General & Administrative	7,265	1,432	7,275	5,843	20%	11,520	12%
Building Overhead	-	-	-	-	-	-	-
Total Expenses	261,191	22,654	38,378	15,725	59%	42,623	53%
<b>Net Profit (Loss)</b>	<b>\$ (133,866)</b>	<b>\$ 28,398</b>	<b>\$ 46,622</b>	<b>\$ (18,223)</b>	<b>61%</b>	<b>\$ 42,377</b>	<b>67%</b>

**Utah State Bar  
Fall Forum  
August 31, 2023**

**Revenue**  
 4051 · Meeting - Registration  
 4052 · Meeting - Sponsor Revenue  
 4053 · Meeting - Vendor Revenue  
 4054 · Meeting - Material Sales  
 4055 · Meeting - Sp Ev Registration  
 4095 · Miscellaneous Income  
 Total Revenue

**Expenses**  
 Program Services  
 Salaries & Benefits  
 General & Administrative  
 Building Overhead  
 Total Expenses

Actual LYTD	Actual YTD	Budget YTD	Fav (Unfav) variance	% of Budget	Total Budget	YTD % of Tot Budget
-	-	-	-	-	67,492	0%
-	6,900	-	6,900	-	1,900	-
-	-	-	-	-	3,400	0%
-	-	-	-	-	-	-
-	-	-	-	-	-	-
-	6,900	-	6,900	0%	-	-
-	6,900	-	6,900	9%	72,792	9%
-	5,250	-	(5,250)	-	63,201	8%
-	-	-	-	-	2,162	0%
170	395	170	(225)	232%	7,430	5%
-	-	-	-	-	-	-
170	5,645	170	(5,475)	3321%	72,793	8%
<b>\$ (170)</b>	<b>\$ 1,255</b>	<b>\$ (170)</b>	<b>\$ 1,425</b>	<b>-738%</b>	<b>\$ (1)</b>	<b>-125500%</b>

**Utah State Bar  
Spring Convention  
August 31, 2023**

	Actual LYTD	Actual YTD	Budget YTD	Fav (Unfav) variance	% of Budget	Total Budget	YTD % of Tot Budget
<b>Revenue</b>							
4051 · Meeting - Registration	-	350	-	350		94,250	0%
4052 · Meeting - Sponsor Revenue	-	(500)	-	(500)		16,000	-3%
4053 · Meeting - Vendor Revenue	-	-	-	-		7,550	0%
4054 · Meeting - Material Sales	-	-	-	-		-	0%
4055 · Meeting - Sp Ev Registration	-	-	-	-		1,400	0%
4095 · Miscellaneous Income	-	-	-	-		-	0%
Total Revenue	-	(150)	-	(150)		119,200	0%
<b>Expenses</b>							
Program Services	-	-	-	-		103,810	0%
Salaries & Benefits	-	-	-	-		6,201	0%
General & Administrative	-	11	-	(11)		9,188	0%
Building Overhead	-	-	-	-		-	0%
Total Expenses	-	11	-	(11)		119,199	0%
<b>Net Profit (Loss)</b>	<b>\$ -</b>	<b>\$ (161)</b>	<b>\$ -</b>	<b>\$ (161)</b>		<b>\$ 1</b>	<b>-16050%</b>



**Utah State Bar  
Member Services  
August 31, 2023**

	Actual LYTD	Actual YTD	Budget YTD	Fav (Unfav) variance	% of Budget	Total Budget	YTD % of Tot Budget
<b>Revenue</b>							
4010 · Section/Local Bar Support fees	-	-	-	-	-	87,051	0%
4051 · Meeting - Registration	-	-	-	-	-	-	-
4052 · Meeting - Sponsor Revenue	-	-	-	-	-	241,817	25%
4061 · Advertising Revenue	34,007	60,102	40,322	19,780	149%	60	0%
4062 · Subscriptions	-	-	-	-	-	1,379	22%
4071 · Mem Benefits - Lexis	329	305	329	(24)	93%	14,033	12%
4072 · Royalty Inc - Bar J, MBNA, LM,M	1,339	1,746	1,255	491	139%	450	0%
4081 · CLE - Registrations	-	-	-	-	-	-	-
4093 · Law Day Revenue	-	-	-	-	-	119	0%
4095 · Miscellaneous Income	-	-	20	(20)	0%	(28)	0%
4200 · Seminar Profit/Loss	-	-	-	-	-	-	-
Total Revenue	35,675	62,153	41,926	20,228	148%	344,881	18%
<b>Expenses</b>							
Program Services	43,376	96,301	62,668	(33,632)	154%	611,630	16%
Salaries & Benefits	24,602	25,894	26,050	156	99%	199,069	13%
General & Administrative	28,332	52,349	32,466	(19,884)	161%	223,307	23%
Building Overhead	2,846	2,747	3,004	257	91%	17,342	16%
Total Expenses	99,157	177,291	124,188	(53,103)	143%	1,051,348	17%
<b>Net Profit (Loss)</b>	<b>\$ (63,482)</b>	<b>(115,138)</b>	<b>\$ (82,262)</b>	<b>\$ (32,876)</b>	<b>140%</b>	<b>\$ (706,467)</b>	<b>16%</b>

# Utah State Bar Public Services August 31, 2023

	Actual LYTD	Actual YTD	Budget YTD	Fav (Unfav) variance	% of Budget	Total Budget	YTD % of Tot Budget
<b>Revenue</b>							
4010 · Section/Local Bar Support fees	-	-	-	-	-	-	-
4051 · Meeting - Registration	-	(1,694)	-	(1,694)			
4063 · Modest Means revenue	2,100	1,600	2,321	(721)	69%	10,000	16%
4093 · Law Day Revenue	-	-	-	-			
4095 · Miscellaneous Income	-	-	-	-		20	0%
4120 · Grant Income	-	20,000	109,539	(89,539)	18%	109,539	18%
4200 · Seminar Profit/Loss	-	-	-	-		(6,256)	0%
<b>Total Revenue</b>	<b>2,100</b>	<b>19,906</b>	<b>111,860</b>	<b>(91,954)</b>	<b>18%</b>	<b>113,303</b>	<b>18%</b>
<b>Expenses</b>							
Program Services	72,724	80,318	73,014	(7,304)	110%	181,785	44%
Salaries & Benefits	58,154	87,829	75,323	(12,506)	117%	508,601	17%
General & Administrative	16,957	14,037	20,170	6,132	70%	104,324	13%
Building Overhead	2,287	2,520	2,440	(79)	103%	15,083	17%
<b>Total Expenses</b>	<b>150,122</b>	<b>184,704</b>	<b>170,947</b>	<b>(13,757)</b>	<b>108%</b>	<b>809,793</b>	<b>23%</b>
<b>Net Profit (Loss)</b>	<b>\$ (148,022)</b>	<b>\$ (164,798)</b>	<b>\$ (59,087)</b>	<b>\$ (105,711)</b>	<b>279%</b>	<b>\$ (696,490)</b>	<b>24%</b>

**Utah State Bar  
Bar Operations  
August 31, 2023**

	Actual LYTD	Actual YTD	Budget YTD	Fav (Unfav) variance	% of Budget	Total Budget	YTD % of Tot Budget
<b>Revenue</b>							
4031 · Enhanced Web Revenue	-	-	-	-	-	-	-
4051 · Meeting - Registration	-	-	-	-	-	-	-
4052 · Meeting - Sponsor Revenue	-	-	-	-	-	-	-
4053 · Meeting - Vendor Revenue	-	-	-	-	-	6,483	0%
4060 · E-Filing Revenue	-	-	-	-	-	-	-
4103 · In - Kind Revenue - UDR	-	(11,500)	12,481	(23,981)	-92%	2,745	-419%
4095 · Miscellaneous Income	12,640						
4200 · Seminar Profit/Loss	-	63,555	18,034	45,521	352%	185,488	34%
Investment Income	19,780						
Total Revenue	32,420	52,055	30,515	21,540	171%	194,716	17%
<b>Expenses</b>							
Program Services	70,902	34,099	30,857	(3,242)	111%	196,661	17%
Salaries & Benefits	221,666	274,427	245,231	(29,196)	112%	1,489,029	18%
General & Administrative	46,924	62,592	57,161	(5,432)	110%	361,449	17%
In Kind	254	253	252	(1)	100%	1,496	17%
Building Overhead	9,790	10,786	10,086	(701)	107%	64,883	17%
Total Expenses	349,536	382,158	343,587	(38,571)	111%	2,113,518	18%
<b>Net Profit (Loss)</b>	<b>\$ (317,117)</b>	<b>(330,104)</b>	<b>\$ (313,072)</b>	<b>\$ (17,032)</b>	<b>105%</b>	<b>\$ (1,918,802)</b>	<b>17%</b>

# Utah State Bar Facilities August 31, 2023

**Revenue**  
 4039 · Room Rental-All parties  
 4042 · Food & Beverage Rev-All Parties  
 4043 · Setup & AV charges-All parties  
 4090 · Tenant Rent  
 4095 · Miscellaneous Income  
 4103 · In - Kind Revenue - UDR  
 Total Revenue

**Expenses**  
 Program Services  
 Salaries & Benefits  
 General & Administrative  
 In Kind  
 Building Overhead  
 Total Expenses

Actual LYTD	Actual YTD	Budget YTD	Fav (Unfav) variance	% of Budget	Total Budget	YTD % of Tot Budget
6,493	6,035	10,703	(4,668)	56%	92,443	7%
5,146	6,397	7,514	(1,117)	85%	97,929	7%
-	-	-	-	-	1,402	0%
3,172	4,000	3,172	828	126%	19,032	21%
-	-	-	-	-	-	-
-	-	-	-	-	-	-
14,811	16,432	21,389	(4,957)	77%	210,806	8%
6,206	10,825	5,145	(5,680)	210%	54,166	20%
23,782	28,500	28,130	(370)	101%	168,779	17%
(11,020)	5,681	(2,852)	(8,533)	-199%	(3,350)	-170%
840	529	848	319	62%	18,502	3%
24,350	26,310	26,112	(198)	101%	159,608	16%
44,157	71,843	57,383	(14,461)	125%	397,705	18%
<b>\$ (29,346)</b>	<b>\$ (55,412)</b>	<b>\$ (35,994)</b>	<b>\$ (19,418)</b>	<b>154%</b>	<b>\$ (186,899)</b>	<b>30%</b>

**Net Profit (Loss)**

**Utah State Bar  
Innovation in Law  
August 31, 2023**

**Revenue**  
 4005 · Admissions - Application Forms  
 4022 · Lic Fees < 3 Years  
 4095 · Miscellaneous Income  
 4120 · Grant Income  
 4103 · In - Kind Revenue - UDR  
 Total Revenue

**Expenses**  
 Program Services  
 Salaries & Benefits  
 General & Administrative  
 In Kind  
 Building Overhead  
 Total Expenses

Actual LYTD	Actual YTD	Budget YTD	Fav (Unfav) variance	% of Budget	Total Budget	YTD % of Tot Budget
-	-	2,083	(2,083)	0%	12,500	0%
-	-	500	(500)	0%	3,000	0%
-	-	1,583	(1,583)	0%	9,500	0%
-	-	17,333	(17,333)	0%	104,000	0%
-	-	-	-	-	-	-
-	-	21,500	(21,500)	0%	129,000	0%
-	265	1,008	743	26%	6,050	4%
-	11,818	14,747	2,928	80%	88,480	13%
-	1,792	5,979	4,187	30%	35,874	5%
-	-	-	-	-	-	-
-	-	405	405	0%	2,431	0%
-	13,875	22,139	8,264	63%	132,835	10%
-	\$ (13,875)	\$ (639)	\$ (13,236)	2171%	\$ (3,835)	362%
<b>Net Profit (Loss)</b>						

**Utah State Bar  
Income Statement - Consolidated By Account  
August 31, 2023**

	Actual LYTD	Actual YTD	Budget YTD	Fav (Unfav) variance	% of Budget	Total Budget	YTD % of Tot Budget
<b>Revenue</b>							
4001 · Admissions - Student Exam Fees	-	(275)	-	(275)		146,472	0%
4002 · Admissions - Attorney Exam Fees	2,550	1,700	3,076	(1,376)	55%	71,069	2%
4003 · Admissions - Retake Fees	-	-	-	-		39,729	0%
4004 · Admissions - Laptop Fees	1,230	400	1,780	(1,380)	22%	101,129	0%
4005 · Admissions - Application Forms	-	1,000	2,083	(1,083)	48%	20,099	5%
4006 · Transfer App Fees	11,900	6,350	15,937	(9,587)	40%	69,972	9%
4008 · Attorney - Motion	10,200	26,350	9,881	16,469	267%	141,219	19%
4009 · House Counsel	5,950	4,250	6,405	(2,155)	66%	32,028	13%
4010 · Section/Local Bar Support fees	-	-	-	-		104,713	0%
4011 · Admissions LPP	-	-	17	(17)	0%	2,602	0%
4012 · Admissions Military Spouse	-	-	-	-		-	0%
4020 · NLTP Fees	4,800	9,600	5,733	3,867	167%	62,883	15%
4021 · Lic Fees > 3 Years	3,751,580	3,804,600	3,844,404	(39,804)	99%	3,967,112	96%
4022 · Lic Fees < 3 Years	146,550	163,470	168,054	(4,584)	97%	238,702	68%
4023 · Lic Fees - House Counsel	50,135	55,875	55,710	165	100%	62,149	90%
4024 · Lic Fees LPP	3,400	4,625	4,001	625	116%	5,202	89%
4025 · Pro Hac Vice Fees	32,350	34,425	33,755	670	102%	222,539	15%
4026 · Lic Fees - inactive/FS	121,380	118,650	124,634	(5,984)	95%	123,058	96%
4027 · Lic Fees - Inactive/NS	219,030	215,775	224,229	(8,454)	96%	229,337	94%
4029 · Prior Year Lic Fees	-	-	-	-		-	0%
4030 · Certs of Good Standing	3,460	2,820	4,054	(1,234)	70%	23,338	12%
4039 · Room Rental-All parties	6,493	6,035	10,703	(4,668)	56%	92,443	7%
4042 · Food & Beverage Rev-All Parties	5,146	6,397	7,514	(1,117)	85%	97,929	7%
4043 · Setup & A/V charges-All parties	-	-	-	-		1,402	0%
4051 · Meeting - Registration	82,125	48,708	55,000	(6,292)	89%	216,742	22%
4052 · Meeting - Sponsor Revenue	32,700	7,400	15,000	(7,600)	49%	76,600	10%
4053 · Meeting - Vendor Revenue	11,300	-	15,250	(15,250)	0%	27,450	0%
4054 · Meeting - Material Sales	-	-	-	-		-	0%
4055 · Meeting - Sp Ev Registration	1,200	-	-	-		1,400	0%
4060 · E-Filing Revenue	-	-	-	-		6,483	0%
4061 · Advertising Revenue	34,007	60,102	40,322	19,780	149%	241,960	25%
4062 · Subscriptions	-	-	-	-		60	0%
4063 · Modest Means revenue	2,100	1,600	2,321	(721)	69%	10,000	16%
4071 · Mem Benefits - Lexis	329	305	329	(24)	93%	1,379	22%
4072 · Royalty Inc - Bar J, MBNA, LM,M	1,339	1,746	1,255	491	139%	14,033	12%
4081 · CLE - Registrations	41,903	63,352	41,382	21,970	153%	449,231	14%
4082 · CLE - Video Library Sales	26,051	13,763	42,035	(28,273)	33%	233,106	6%
4090 · Tenant Rent	3,172	4,000	3,172	828	126%	19,032	21%
4093 · Law Day Revenue	-	-	-	-		2,952	0%
4095 · Miscellaneous Income	13,335	(9,885)	14,854	(24,739)	-67%	23,902	-41%
4096 · Late Fees	46,800	37,750	52,758	(15,008)	72%	106,600	35%
4200 · Seminar Profit/Loss	-	-	-	-		114,000	0%
Investment income	19,780	63,555	18,034	45,521	352%	185,488	34%
<b>Total Revenue</b>	<b>4,692,296</b>	<b>4,754,442</b>	<b>4,823,681</b>	<b>(69,239)</b>	<b>99%</b>	<b>7,585,604</b>	<b>63%</b>
<b>Program Service Expenses</b>							
5001 · Meeting Facility-external only	45,967	12,690	22,414	9,724	57%	104,128	12%
5002 · Meeting facility-internal only	4,663	4,760	4,917	157	97%	26,456	18%
5013 · ExamSoft	17,623	17,821	17,623	(198)	101%	17,623	101%
5014 · Questions	49,129	11,375	49,129	37,754	23%	73,982	15%
5015 · Investigations	179	150	296	146	51%	1,629	9%
5016 · Credit Checks	293	357	258	(99)	139%	2,169	16%
5017 · Medical Exam	-	-	-	-		320	0%
5020 · Exam Scoring	-	-	-	-		-	0%
5025 · Temp Labor/Proctors	3,238	6,350	3,280	(3,071)	194%	3,772	168%
5030 · Speaker Fees & Expenses	23,269	-	9,825	9,825	0%	54,400	0%
5031 · Speaker Reimb. - Receipt Req'd	-	-	1,358	1,358	0%	9,148	0%
5035 · Awards	2,890	1,876	1,366	(510)	137%	11,492	16%
5037 · Grants/ contributions - general	-	1,500	4,250	2,750	35%	35,500	4%
5040 · Witness & Hearing Expense	(15)	-	(12)	(12)	0%	2,756	0%
5041 · Process Serving	-	186	-	(186)	0%	569	33%
5046 · Court Reporting	30	1,680	270	(1,410)	622%	1,470	114%
5047 · Casemaker	8,479	8,479	8,334	(145)	102%	50,000	17%
5055 · Legislative Expense	10,000	11,000	10,000	(1,000)	110%	62,134	18%
5060 · Program Special Activities	-	-	-	-		-	0%
5061 · LRE - Bar Support	60,000	60,000	60,000	-	100%	60,000	100%
5062 · Law Day	-	-	304	304	0%	13,159	0%
5063 · Special Event Expense	2,861	18,399	1,496	(16,903)	1230%	49,947	37%
5064 · MCLE Fees Paid	5,186	6,555	9,443	2,888	69%	58,017	11%
5070 · Equipment Rental	4,646	3,112	6,117	3,005	51%	15,217	20%
5075 · Food & Bev-external costs only	177,086	18,741	12,163	(6,578)	154%	360,097	5%
5076 · Food & beverage - internal only	3,371	4,859	5,282	422	92%	41,948	12%
5079 · Soft Drinks	1,831	1,920	1,706	(214)	113%	5,649	34%
5085 · Misc. Program Expense	1,247	-	2,817	2,817	0%	9,853	0%
5090 · Commission Expense	5,545	7,064	5,364	(1,700)	132%	40,067	18%
5095 · Wills for Heroes	-	-	11	11	0%	1,315	0%
5096 · UDR Support	-	-	-	-		-	0%
5099 · Blomquist Hale	14,940	40,757	32,876	(7,881)	124%	391,000	10%
5702 · Travel - Lodging	21,818	17,667	5,887	(11,780)	300%	58,184	30%
5703 · Travel - Transportation/Parking	13,620	2,725	6,373	3,648	43%	40,125	7%
5704 · Travel - Mileage Reimbursement	2,256	36	298	262	12%	10,112	0%
5705 · Travel - Per Diems	3,002	574	1,598	1,025	36%	6,250	9%
5706 · Travel - Meals	-	190	150	(40)	127%	900	21%
5707 · Travel - Commission Mtgs	43,910	-	4,500	4,500	0%	27,000	0%
5805 · ABA Annual Meeting	-	885	304	(581)	291%	4,554	19%

**Utah State Bar  
Income Statement - Consolidated By Account  
August 31, 2023**

	Actual LYTD	Actual YTD	Budget YTD	Fav (Unfav) variance	% of Budget	Total Budget	YTD % of Tot Budget
5810 - ABA Mid Year Meeting	-	-	146	146	0%	4,378	0%
5815 - Commission/Education	-	-	1,700	1,700	0%	10,200	0%
5820 - ABA Annual Delegate	3,046	-	2,550	2,550	0%	7,241	0%
5830 - Western States Bar Conference	-	-	4,410	4,410	0%	26,459	0%
5840 - President's Expense	3,000	3,000	3,000	-	100%	18,000	17%
5841 - President's Reimbursement	-	-	-	-	0%	-	0%
5845 - Reg Reform Task Force	-	-	-	-	0%	-	0%
5850 - Leadership Academy	-	283	1,667	1,384	17%	10,000	3%
5855 - Bar Review	36	-	-	-	0%	-	0%
5865 - Retreat	-	39,417	7,550	(31,867)	522%	45,300	87%
5866 - Wellbeing Committee	10,300	39,221	10,355	(28,866)	379%	101,100	39%
5867 - Bar Membership Survey	-	-	-	-	0%	-	0%
5868 - UCLI Support	-	-	500	500	0%	3,000	0%
5960 - Overhead Allocation - Seminars	-	-	154	154	0%	704	0%
5970 - Event Revenue Sharing - 3rd Pty	12,221	5,679	12,683	7,004	45%	86,939	7%
<b>Total Program Service Expenses</b>	<b>568,741</b>	<b>349,306</b>	<b>334,711</b>	<b>(14,596)</b>	<b>104%</b>	<b>1,964,263</b>	<b>18%</b>
<b>Salaries &amp; Benefit Expenses</b>							
5510 - Salaries/Wages	531,001	636,783	598,688	(38,095)	106%	3,543,762	18%
5605 - Payroll Taxes	40,800	48,403	46,891	(1,513)	103%	281,711	17%
5610 - Health Insurance	42,932	47,264	50,549	3,285	94%	309,533	15%
5620 - Health Ins/Medical Reimb	600	2,068	557	(1,511)	371%	5,659	37%
5630 - Dental Insurance	2,627	2,969	3,371	401	88%	18,608	16%
5640 - Life & LTD Insurance	3,140	3,411	3,666	254	93%	22,421	15%
5645 - Workman's Comp Insurance	710	1,056	710	(346)	149%	1,680	63%
5650 - Retirement Plan Contributions	44,744	45,458	48,636	3,178	93%	288,770	16%
5655 - Retirement Plan Fees & Costs	-	-	136	136	0%	13,966	0%
5660 - Training/Development	1,750	1,640	1,916	276	86%	13,828	12%
<b>Total Salaries &amp; Benefit Expenses</b>	<b>668,303</b>	<b>789,075</b>	<b>755,117</b>	<b>(33,957)</b>	<b>104%</b>	<b>4,499,937</b>	<b>18%</b>
<b>General &amp; Administrative Expenses</b>							
7025 - Office Supplies	2,577	5,354	3,613	(1,740)	148%	21,985	24%
7015 - Office Equip Repairs	-	93	-	(93)	-	-	0%
7033 - Operating Meeting Supplies	239	947	160	(787)	592%	2,338	40%
7035 - Postage/Mailing, net	177	14,240	8,108	(6,132)	176%	52,816	27%
7040 - Copy/Printing Expense	21,286	38,374	21,621	(16,753)	177%	138,367	28%
7041 - Copy/Print revenue	(2,670)	(3,148)	(2,456)	692	128%	(15,137)	21%
7045 - Internet Service	1,899	4,830	2,066	(2,764)	234%	22,386	22%
7050 - Computer Maintenance	24,669	37,299	28,482	(8,817)	131%	262,786	14%
7055 - Computer Supplies & Small Equip	6,676	4,396	9,519	5,123	46%	35,414	12%
7089 - Membership Database Fees	22,132	11,257	28,404	17,147	40%	112,450	10%
7095 - Fax Equip & Supplies	-	-	-	-	-	-	0%
7100 - Telephone	10,422	9,951	10,493	542	95%	63,334	16%
7105 - Advertising	2,647	5,098	5,552	454	92%	47,414	11%
7106 - Public Notification	-	-	-	-	-	-	0%
7107 - Production Costs	700	-	3,417	3,417	0%	15,106	0%
7110 - Publications/Subscriptions	6,818	4,691	8,165	3,474	57%	30,241	16%
7115 - Public Relations	-	-	-	-	-	-	0%
7120 - Membership/Dues	9,339	9,230	10,033	803	92%	16,188	57%
7135 - Bank Service Charges	337	(80)	482	562	-17%	790	-10%
7136 - ILM Service Charges	3,249	3,322	3,289	(33)	101%	20,239	16%
7138 - Bad debt expense	-	-	-	-	-	-	0%
7140 - Credit Card Merchant Fees	24,403	39,533	19,724	(19,809)	200%	148,940	27%
7141 - Credit Card surcharge	(18,309)	(561)	(4,567)	(4,006)	12%	(4,988)	11%
7145 - Commission Election Expense	-	-	508	508	0%	3,050	0%
7150 - E&O/Off & Dir Insurance	11,731	12,444	11,350	(1,094)	110%	68,103	18%
7160 - Audit Expense	10,000	10,000	10,244	244	98%	42,031	24%
7170 - Lobbying Rebates	-	-	-	-	-	336	0%
7175 - O/S Consultants	219	5,605.13	155	(5,450)	3616%	64,778	9%
7176 - Bar Litigation	86	1,620	89	(1,531)	1820%	29,213	6%
7177 - UPL	-	-	-	-	-	15,867	0%
7178 - Offsite Storage/Backup	-	-	-	-	-	-	0%
7179 - Payroll Adm Fees	312	702	311	(391)	226%	3,603	19%
7180 - Administrative Fee Expense	264	288	249	(39)	116%	1,666	17%
7190 - Lease Interest Expense	833	843	657	(186)	128%	2,581	33%
7191 - Lease Sales Tax Expense	-	-	-	-	-	-	0%
7195 - Other Gen & Adm Expense	1,162	2,675	1,998	(677)	134%	17,273	15%
<b>Total General &amp; Administrative Expenses</b>	<b>141,199</b>	<b>219,002</b>	<b>181,667</b>	<b>(37,335)</b>	<b>121%</b>	<b>1,219,170</b>	<b>18%</b>
<b>In Kind Expenses</b>							
7103 - InKind Contrib-UDR & all other	1,094	782	1,100	318	71%	19,998	4%
<b>Total In Kind Expenses</b>	<b>1,094</b>	<b>782</b>	<b>1,100</b>	<b>318</b>	<b>71%</b>	<b>19,998</b>	<b>4%</b>
<b>Building Overhead Expenses</b>							
6015 - Janitorial Expense	7,843	5,691	8,164	2,473	70%	32,407	18%
6020 - Heat	1,733	2,326	1,642	(684)	142%	28,356	8%
6025 - Electricity	10,164	10,964	10,264	(700)	107%	45,489	24%
6030 - Water/Sewer	2,128	2,851	1,995	(856)	143%	7,550	38%
6035 - Outside Maintenance	3,425	1,981	3,214	1,233	62%	29,801	7%
6040 - Building Repairs	1,340	4,171	1,096	(3,074)	380%	12,146	34%
6045 - Bldg Mtncce Contracts	2,754	4,568	2,694	(1,874)	170%	28,089	16%
6050 - Bldg Mtncce Supplies	-	-	-	-	-	-	0%
6055 - Real Property Taxes	5,302	4,410	5,574	1,164	79%	30,156	15%
6060 - Personal Property Taxes	73	217	28	(189)	774%	444	49%
6065 - Bldg Insurance/Fees	3,847	3,819	3,868	48	99%	23,417	16%
6070 - Building & Improvements Depre	14,059	15,407	13,913	(1,494)	111%	86,658	18%

**Utah State Bar**  
**Income Statement - Consolidated By Account**  
**August 31, 2023**

	Actual LYTD	Actual YTD	Budget YTD	Fav (Unfav) variance	% of Budget	Total Budget	YTD % of Tot Budget
6075 · Furniture & Fixtures Depre	847	2,570	1,081	(1,489)	238%	6,487	40%
7065 · Computers, Equip & Sftwre Depr	6,718	6,089	10,853	4,764	56%	65,101	9%
<b>Total Building Overhead Expenses</b>	60,230	65,063	64,386	(677)	101%	396,101	16%
<b>Total Expenses</b>	1,439,567	1,423,228	1,336,981	(86,247)	106%	8,099,469	18%
<b>Other</b>							
4300 · Gain (Loss) - Disposal Of Assets	-	-	-	-	-	-	0%
4120 · Grant Income	-	20,000	126,872	106,872	16%	213,539	9%
	-	20,000	126,872	106,872	16%	213,539	9%
<b>Net Profit (Loss)</b>	\$ 3,252,728	\$ 3,351,214	\$ 3,613,573	\$ (262,359)	93%	\$ (300,326)	-1116%



**Utah State Bar  
Balance Sheets**

	8/31/2023	7/31/2023	6/30/2023
<b>ASSETS</b>			
Current Assets			
Petty Cash	\$ 480	\$ 480	\$ 492
Cash in Bank	1,323,288	1,640,344	1,615,702
Invested Funds	7,898,792	7,871,760	7,846,747
Total Cash/Investments	<u>9,222,559</u>	<u>9,512,583</u>	<u>9,462,941</u>
Accounts Receivable	48,074	71,085	87,469
Prepaid Expenses	366,552	331,749	301,765
A/R - Sections	87,666	83,902	80,113
Total Other Current Assets	<u>502,292</u>	<u>486,735</u>	<u>469,347</u>
Total Current Assets	<u>9,724,851</u>	<u>9,999,319</u>	<u>9,932,288</u>
Fixed Assets			
Property & Equipment	5,174,518	5,118,315	5,107,752
Accumulated Depreciation	(4,252,984)	(4,241,571)	(4,229,508)
Land	633,142	633,142	633,142
Total Fixed Assets	<u>1,554,675</u>	<u>1,509,885</u>	<u>1,511,385</u>
<b>TOTAL ASSETS</b>	<u>\$ 11,279,526</u>	<u>\$ 11,509,204</u>	<u>\$ 11,443,673</u>
<b>LIABILITIES &amp; EQUITY</b>			
Liabilities			
Current Liabilities			
AP Trade	\$ 209,146	\$ 109,007	\$ 324,674
Other Accounts Payable	283,069	241,737	215,334
Accrued Payables	563,056	561,854	521,733
Cap Lease Oblig - ST	1,669	1,669	1,669
A/P - Sections	359,495	351,685	306,425
Deferred Revenue	55,706	56,606	3,617,316
Total Current Liabilities	<u>1,472,141</u>	<u>1,322,559</u>	<u>4,987,151</u>
Long Term Liabilities			
Capital Lease Oblig	8,508	8,859	8,859
Total Long Term Liabilities	<u>8,508</u>	<u>8,859</u>	<u>8,859</u>
Total Liabilities	<u>1,480,649</u>	<u>1,331,418</u>	<u>4,996,010</u>
Equity			
Unrestricted Net Assets (R/E)	6,447,663	6,447,663	6,601,662
Fund Balance - Current Year	3,351,214	3,730,123	(153,998)
Total Equity	<u>9,798,877</u>	<u>10,177,786</u>	<u>6,447,663</u>
<b>TOTAL LIABILITIES &amp; EQUITY</b>	<u>\$ 11,279,526</u>	<u>\$ 11,509,204</u>	<u>\$ 11,443,673</u>

ILM-UT ST BAR (3176)

Dated: 09/13/2023

Balance Sheet Classification

Base Currency: USD As of 08/31/2023

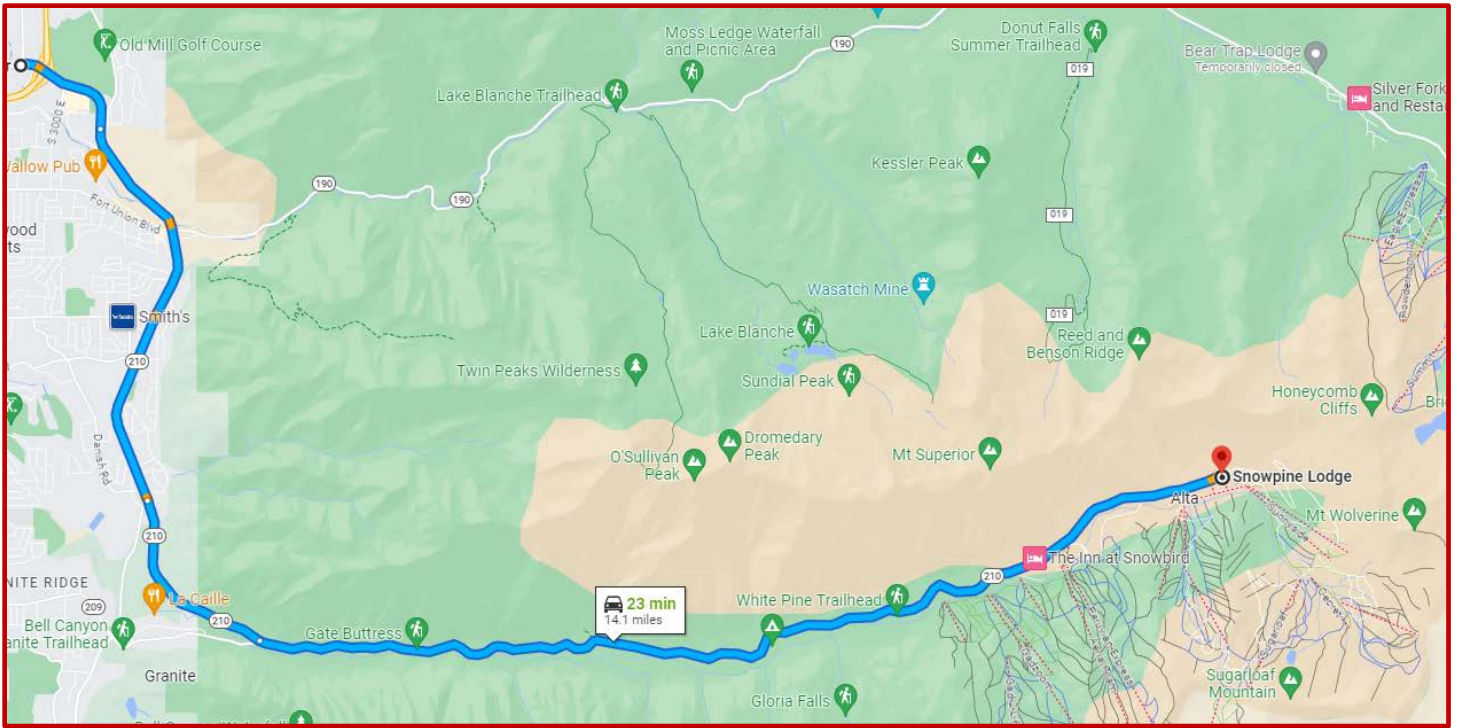
CE	Identifier	Description	Current Units	Rating	Coupon	Effective Maturity	Book Yield	Yield	Base Book Value	Base Net Total Unrealized Gain/Loss	Market Price	Base Accrued Balance	Base Market Value + Accrued
	38141W273	GOLDMAN:FS GOVT INST	608,634.41	AAA	5.220	08/31/2023	5.230	5.230	608,634.41	0.00	1.0000	0.00	608,634.41
	CCYUSD	Cash	5,299.31	AAA	0.000	08/31/2023	0.000	0.000	5,299.31	0.00	1.0000	0.00	5,299.31
			<b>613,933.72</b>	<b>AAA</b>	<b>—</b>	<b>08/31/2023</b>	<b>5.185</b>	<b>5.185</b>	<b>613,933.72</b>	<b>0.00</b>	<b>1.0000</b>	<b>0.00</b>	<b>613,933.72</b>

ST	Identifier	Description	Current Units	Rating	Coupon	Effective Maturity	Book Yield	Yield	Base Book Value	Base Net Total Unrealized Gain/Loss	Market Price	Base Accrued Balance	Base Market Value + Accrued
	74368CBA1	PROTECTIVE LIFE GLOBAL FUNDING	350,000.00	AA-	0.473	01/12/2024	5.998	6.047	343,211.68	-162.33	98.0141	225.33	343,274.68
	3130AM5J7	FEDERAL HOME LOAN BANKS	500,000.00	AAA	0.375	04/29/2024	5.500	5.499	483,669.48	-85.98	96.7167	635.42	484,218.92
	795451AU7	Sallie Mae Bank	250,000.00	BBB+	0.350	09/22/2023	0.400	0.397	249,992.81	0.00	99.9971	390.75	250,383.56
	87165EUF2	Synchrony Bank	250,000.00	BBB	0.400	09/18/2023	0.450	0.446	249,994.16	0.00	99.9977	466.67	250,460.83
	90348JT34	UBS Bank USA	250,000.00	A+	0.350	09/22/2023	0.400	0.398	249,992.81	0.00	99.9971	23.97	250,016.78
	38149MZ4	Goldman Sachs Bank USA (New York)	250,000.00	A+	0.350	09/22/2023	0.400	0.397	249,992.81	0.00	99.9971	390.75	250,383.56
	05580AD92	BMW Bank of North America	250,000.00	AA-	0.350	09/25/2023	0.400	0.398	249,991.76	0.00	99.9967	385.96	250,377.72
	538036SD7	Live Oak Banking Company	250,000.00	NA	0.250	10/02/2023	0.300	0.299	249,989.35	0.00	99.9957	53.08	250,042.44
	89114XE2	TORONTO-DOMINION BANK	250,000.00	A+	5.150	05/24/2024	4.234	6.234	251,637.59	-3,560.34	99.2309	250.35	248,327.60
	78014RGL8	ROYAL BANK OF CANADA	250,000.00	A+	4.000	11/30/2023	3.982	6.065	250,000.00	-1,271.25	99.4915	27.78	248,756.53
	3133ENY87	FEDERAL FARM CREDIT BANKS FUNDING CORP	500,000.00	AAA	5.050	11/09/2023	5.050	5.544	500,000.00	-543.50	99.8913	7,855.56	507,312.06
	912796Z2	UNITED STATES TREASURY	500,000.00	A-1+	0.000	12/28/2023	5.436	5.443	491,436.81	-155.70	98.2562	0.00	491,281.11
	3130AUW35	FEDERAL HOME LOAN BANKS	500,000.00	AAA	5.165	03/08/2024	5.531	5.577	499,097.94	-134.44	99.7927	1,506.46	500,469.96
	3130AQW90	FEDERAL HOME LOAN BANKS	500,000.00	AAA	2.500	02/23/2024	5.460	5.372	493,100.92	202.07	98.6606	277.78	493,580.78
	3135GAJPT	FEDERAL NATIONAL MORTGAGE ASSOCIATION	1,000,000.00	AAA	5.500	07/24/2024	5.500	5.610	1,000,000.00	-1,009.00	99.8991	5,652.78	1,004,643.78
			<b>5,850,000.00</b>	<b>AA</b>	<b>—</b>	<b>01/31/2024</b>	<b>4.049</b>	<b>4.284</b>	<b>5,812,108.11</b>	<b>-6,720.45</b>	<b>---</b>	<b>18,142.63</b>	<b>5,823,530.29</b>

LT	Identifier	Description	Current Units	Rating	Coupon	Effective Maturity	Book Yield	Yield	Base Book Value	Base Net Total Unrealized Gain/Loss	Market Price	Base Accrued Balance	Base Market Value + Accrued
	525ESC1Y5	LEHMAN ESCROW	300,000.00	NA	0.000	01/01/2049	---	2,627.343	0.00	450.00	0.1500	0.00	450.00
	3130APDV4	FEDERAL HOME LOAN BANKS	500,000.00	AAA	0.650	10/07/2024	5.414	5.447	474,930.26	-211.26	94.9438	1,300.00	476,019.00
	3130AJUJ5	FEDERAL HOME LOAN BANKS	500,000.00	AAA	1.610	09/04/2024	5.415	5.494	481,577.63	-375.63	96.2404	3,957.92	485,159.92
	3133EPTK1	FEDERAL FARM CREDIT BANKS FUNDING CORP	500,000.00	AAA	5.500	11/21/2024	5.508	5.689	500,000.00	-1,065.00	99.7870	763.89	499,698.89
			<b>1,800,000.00</b>	<b>AAA</b>	<b>---</b>	<b>10/14/2024</b>	<b>5.446</b>	<b>6.353</b>	<b>1,456,507.89</b>	<b>-1,201.89</b>	<b>---</b>	<b>6,021.81</b>	<b>1,461,327.81</b>

Summary	Identifier	Description	Current Units	Rating	Coupon	Effective Maturity	Book Yield	Yield	Base Book Value	Base Net Total Unrealized Gain/Loss	Market Price	Base Accrued Balance	Base Market Value + Accrued
			<b>8,263,933.72</b>	<b>AA+</b>	<b>---</b>	<b>03/07/2024</b>	<b>4.395</b>	<b>4.736</b>	<b>7,882,549.72</b>	<b>-7,922.34</b>	<b>---</b>	<b>24,164.44</b>	<b>7,898,791.82</b>

\* Grouped by: BS Class 2 \* Groups Sorted by: BS Class 2 \* Weighted by: Base Market Value + Accrued, except Book Yield by Base Book Value + Accrued. \* Holdings Displayed by: Lot.



### Directions to Snowpine Lodge, Alta

- Drive I-215 to 6200 S. Exit
- Head EAST on 6200 S/Big Cottonwood Road toward Holladay Blvd. E (.9 Miles)
- Continue onto Wasatch Blvd. E (3.3 Miles)
- Continue onto UT-210 S/N Little Cottonwood Road (1.6 Miles)
- Continue straight onto UT-210 Little Cottonwood Canyon Road E (Little Cottonwood Canyon - 8.3 Miles)
- **Snowpine Lodge will be on the right.**  
10420 Little Cottonwood Road, Alta, UT 84092

No charge for parking.

