

**PARALEGAL DIVISION OF THE UTAH STATE BAR**  
BOARD MEETING MINUTES  
October 11, 2022

12:02 PM Katie Lawyer calls the meeting to order. The following attendees are present:

<u>In Person</u>	<u>Excused</u>
Katie Lawyer Alex Vaka'uta Cheri Christensen Julie Eriksson Liberty Stevenson Melissa Parache Peter Vanderhooft Shalise McKinlay Shari Dirksen	Jennifer Welsh Lexi Balling Nacia Franco Stefanie Ray Suzanne Potts

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**General Updates and Discussion**

Katie Lawyer discusses preparing a call for nominees for the 2023-2024 Paralegal Division Board. Katie Lawyer or Lexi Balling will send out the information.

Katie Lawyer discusses the copyright issues regarding CLEs and the update with the Bar. The Bar has indicated that CLE information can be used outside of the confines of the CLE. Still, the Paralegal Division Board does have the discretion to monitor and limit disruptive behavior during CLE.

Katie Lawyer discusses the need for more Education Committee members and reminds the Board that either Board or Division members may join the Education Committee. Anyone interested in joining the Education Committee may reach out to Julie Eriksson, Nacia Franco, or Katie Lawyer.

Katie Lawyer reminds the Board of Melissa Parache's updated email. Peter Vanderhooft notes that Suzanne Potts' email has also changed. Katie Lawyer provides the updates emails to the Board.

Peter Vanderhooft motions to approve the September 2022 Board Meeting Minutes and the motion is seconded. The Board approves the September 2022 meeting minutes.

**Membership:**

Cheri Christensen notes that the Paralegal Division website membership portal works along with the form links. She requests that the Board review the Paralegal Division website to ensure that the information is up-to-date and accurate. Cheri Christensen also asks the Board whether she needs to reach out to new and renewing applicants who have already paid and ask them to submit the required forms as part of their applications. The Board determines that the forms are required, and Stefanie Ray may be able to assist with this task.

Cheri Christensen discusses four new applicants to the Paralegal Division with the Weber State Paralegal Certificate Program credential. The Board discusses the certificate program and reviews the website for the program. The Board determines that more information is required about the program before the applicants can be approved. Katie Lawyer and Lexi Balling will contact Weber State for more information. Shalise McKinlay discusses the requirements Form B and notes that the Weber State

program does not appear to meet the requirements outlined in Form B. Shalise McKinlay suggests that the Board inform the new applicants and recommend that if the applicants do not meet the other requirements listed in Form B ¶ 3, the Board advises that the applicants apply for membership with the Utah Paralegal Association in the interim.

#### **Education:**

Julie Eriksson advised the Board that the Education Committee had a separate meeting where the Committee was able to plan speakers for the Brown Bag CLE events for the coming year. She also mentioned that the Committee is looking at potential speakers for Paralegal Day and the Annual CLE event and requested recommendations from the Board.

Julie Eriksson discussed recent changes in hotel policies related to reserving conference space and the difficulty in securing a venue for Paralegal Day. She also discussed alternative venues and requested additional recommendations from the Board.

#### **Ethics and Professional Standards/Utah Paralegal Association Liaison:**

No updates.

#### **Community Service Report:**

The next Wills for Heroes event will be directed toward the Utah Department of Corrections and will be held in Draper on November 12, 2022. Additional volunteers will be required for this event. Katie Lawyer mentioned that Lexi Balling would be sending out the notice shortly.

#### **Marketing:**

Katie Lawyer mentioned that Strong & Hanni has reached out requesting brochures to hand out at their upcoming paralegal retreat to encourage more people at their firm to join the Division. Shari Dirksen will contact Greg Wayment regarding the previous Paralegal Division's Brochures. Shari Dirksen will ensure that the brochure is current and updated and will distribute it to the Board for review. Shari Dirksen is also working on the upcoming Fall Newsletter.

#### **Finance Report:**

Cheri Christensen mentioned that our Google Drive is full and that she is receiving notices to pay for additional space for \$20.00 per year. Shalise McKinlay indicated that the Board is aware of this issue. The Board needs to determine a protocol to determine which member of the Board will pay for this expense. The Board will also need to develop a system to ensure that credit card information is updated during leadership changes. The Board will readdress this issue in the future, as no decision was made on the process at the meeting.

#### **Bar Commission Report:**

Shalise McKinlay reported that the Bar Commission recently had a presentation relating to the Sandbox to determine who will continue to fund this project. The Bar Commission Retreat is scheduled to take place in Springdale, Utah where they will focus on communication.

**UPL Committee:**

No updates.

**Nominations/Parliamentarian:**

No updates.

**Open Floor:**

12:48 PM PM–Cheri Christensen motions to adjourn, Shari Dirksen seconds. The meeting is adjourned.

/s/Peter N. Vanderhoof  
Peter N. Vanderhoof, Secretary

