

# JUDICIAL COUNCIL MEETING

## AGENDA

**July 21, 2025**

**Meeting held through Webex  
and in person**

**Matheson Courthouse – Council Room  
450 S State Street  
Salt Lake City, UT 84111**

***Chief Justice Matthew B. Durrant, Presiding***

1. 9:00 a.m. Welcome & Approval of Minutes.....Chief Justice Matthew B. Durrant  
(TAB 1 - Action)
2. 9:05 a.m. Chair’s Report.....Chief Justice Matthew B. Durrant  
(Information)
3. 9:10 a.m. State Court Administrator’s Report.....Neira Siaperas  
(Information)
4. 9:20 a.m. Reports: Management Committee.....Chief Justice Matthew B. Durrant  
Budget and Fiscal Management Committee.....Judge Rita Cornish  
Liaison Committee.....Judge Thomas Low  
Policy, Planning, and Technology Committee.....Judge James Gardner  
Bar Commission.....Katie Woods, esq.  
(TAB 2 - Information)
5. 9:30 a.m. Budget and Grants.....Karl Sweeney  
(TAB 3 - Action) Alisha Johnson
6. 9:40 a.m. Open and Public Meetings Act Training.....Bryson King  
(Information)
7. 9:50 a.m. Certification of a Justice Court Judge.....Jim Peters  
(TAB 4 - Action)

**10:00 a.m. Break**

8. 10:10 a.m. Judicial Performance Evaluation Commission.....Mary-Margaret Pingree  
(TAB 5 - Information) Report Madison Klein
9. 10:25 a.m. Indigent Defense Commission Report.....Matthew Barraza  
(TAB 6 - Action)
10. 10:40 a.m. Rules for Final Approval.....Keisa Williams  
(TAB 7 - Action)
11. 10:45 a.m. Old Business / New Business.....All  
(Discussion)
12. 10:55 a.m. Consent Calendar.....Chief Justice Matthew B. Durrant  
(Action)
13. 11:00 a.m. Senior Judge Appointments.....Neira Siaperas  
(Action)
14. 11:05 a.m. Executive Session.....Chief Justice Matthew B. Durrant
15. 11:20 a.m. Adjourn.....Chief Justice Matthew B. Durrant

#### **Consent Calendar**

1. Rules for Public Comment  
(TAB 8)
2. Ethics Advisory Committee Membership Appointments  
(TAB 9)

# Tab 1

**JUDICIAL COUNCIL MEETING  
Minutes**

**June 23, 2025  
9:00 a.m. – 12:10 p.m.**

**Meeting held through Webex  
and in person**

**Matheson Courthouse - Council Room  
450 S State Street  
Salt Lake City, UT 84111**

***Chief Justice Matthew B. Durrant, Chair, Presiding***

**Members:**

Chief Justice Matthew B. Durrant, Chair  
Hon. David Mortensen, Vice Chair  
Hon. Suchada Bazzelle  
Hon. Brian Brower  
Hon. Jon Carpenter  
Hon. Samuel Chiara  
Hon. Rita Cornish  
Hon. Susan Eisenman  
Hon. Angela Fonnesbeck  
Hon. James Gardner  
Hon. Michael Leavitt  
Hon. Thomas Low  
Hon. Brendan McCullagh  
Hon. Amber Mettler  
Justice Paige Petersen  
Kristin K. Woods

**Presenters:**

Brody Arishita  
Suzette Deans  
Todd Eaton  
Amy Hernandez  
Alisha Johnson  
Janine Liebert  
Jessica Vazquez-Leavitt  
Jordan Murray  
Bart Olsen  
Mark Paradise

**AOC Staff:**

Ron Gordon  
Neira Siaperas  
Brody Arishita  
Shane Bahr  
Cindy Schut  
Michael Drechsel  
Jim Peters  
Cindy Schut  
Nick Stiles  
Karl Sweeney  
Sonia Sweeney  
Hilary Wood  
Keisa Williams

**Excused:**

Hon. Michael DiReda

**Guests:**

Michael Starks

**Presenters (cont.)**

Russell Pearson  
Erin Rhead  
Judge Laura Scott  
Karl Sweeney  
Chris Talbot  
Kaden Taylor

**1. WELCOME AND APPROVAL OF MINUTES: (Chief Justice Matthew B. Durrant)**

Chief Justice Matthew B. Durrant welcomed everyone to the meeting and asked if there were any questions or comments on the previous month's minutes. There were none.

**Motion:** Judge Brendan McCullagh made a motion to approve May 19, 2025 meeting minutes. Judge Jon Carpenter seconded the motion, which passed unanimously.

**2. CHAIR'S REPORT: (Chief Justice Matthew B. Durrant)**

Chief Justice Matthew B. Durrant reported on a recent meeting with Speaker of the House, Mike Schultz. During the meeting, Speaker Schultz delivered a letter outlining various concerns. The Chief Justice noted that follow-up discussions on the issues raised in the letter will take place at a future time.

**3. STATE COURT ADMINISTRATOR'S REPORT: (Ron Gordon)**

Ron Gordon introduced Michael Starks as the new Deputy District Court Administrator on the AOC team, expressing enthusiasm for his addition to the district court leadership.

Mr. Gordon provided an update on the Judiciary's budget review currently underway by legislative fiscal analysts. As part of this process, Stacey Snyder coordinated a court observation visit for legislative staff, which was described as highly beneficial in enhancing their understanding of judicial operations.

He also announced the start of a legislative performance audit of the Judiciary, initiated as part of a broader review of criminal justice system agencies. The audit scope is still being defined and may cover any aspect of judicial performance. Additional information is expected in the coming months.

**4. JUDICIAL CONDUCT COMMITTEE REPORT: (Alex Peterson, Joe McGivern)**

Alex Peterson introduced Joe McGivern as the new Judicial Investigator for the Judicial Conduct Commission (JCC). Mr. McGivern joined the Commission earlier this year, bringing 25 years of experience in federal law enforcement.

Mr. Peterson reported a significant increase in the volume of complaints received by the JCC. As of the meeting date, the Commission had opened 191 cases for the year and anticipates concluding the year with 195 or more, up from 183 in the previous year. Despite this increase, the case disposition rate has remained statistically consistent.

He noted that the spike in complaints is largely attributable to the implementation of Utah's online complaint submission system. However, the underlying rate of judicial misconduct remains steady, with approximately 95% of complaints dismissed—most commonly due to lack of evidence or because the complaint concerns judicial rulings, which fall outside the Commission's authority.

Mr. Peterson also highlighted a distinctive feature of Utah's JCC: the inclusion of four legislators as Commission members. He emphasized that this structure is unique nationally and serves as a key

strength, enabling legislative members to gain insight into the Commission’s work and communicate that understanding to both the legislature and the public, thereby supporting the JCC’s continued effectiveness.

## **5. COMMITTEE REPORTS:**

### **Management Committee:**

Nothing to report.

### **Budget & Fiscal Management Committee:**

The work of the committee will be discussed later in the meeting.

### **Liaison Committee:**

Nothing to report.

### **Policy, Planning, and Technology Committee:**

The work of the committee will be discussed later in the meeting.

### **Bar Commission:**

The Bar’s annual cycle is ending this month and on Thursday, the Bar will have its annual meeting where Kim Cordova will be sworn in as president and Tyler Young as president elect.

## **6. COURT FACILITY PLANNING COMMITTEE REPORT: (Chris Talbot)**

Chris Talbot shared the FY 2026 priority plan for presenting projects to the legislature for funding approval. The list remains largely unchanged from last year, though a few projects switched positions.

- Project #1: Davis County Courthouse, estimated cost: \$155M
- Project #2: Iron County, Cedar City Courthouse, estimated cost: \$65M
- Project #3: Utah County, Lehi Courthouse, estimated cost: \$56M
- Project #4: Grand County, Moab Courthouse, estimated cost: \$30M
- Project #5: Sevier County, Richfield Courthouse, estimated cost: \$42M
- Project #6: Salt Lake County, West Jordan Courthouse, estimated cost: \$23M

Mr. Talbot noted that the committee is preparing to present two courthouse projects to the legislature during the upcoming session. He emphasized that presenting multiple projects—an approach common among other state agencies—helps increase visibility and may expedite funding approvals, which have historically taken significant time.

**Motion:** Judge Rita Cornish made a motion to approve the order of the projects as presented. Judge McCullagh seconded the motion, which passed unanimously.

Mr. Talbot shared photos of the new Manti courthouse, which opened in February 2025, with a March dedication attended by the Chief Justice and Governor. He noted that while courthouse designs reflect traditional aesthetics suited to each community, they are built with cost-efficiency in mind.

Concerns were raised about the long-term durability of lower-cost materials. Mr. Talbot indicated that finishes meet durability standards and include expected upgrades. He highlighted the challenge of futureproofing for technology but explained that raised floors with cable chases are included to accommodate future needs. Buildings are constructed with a 50 to 75-year lifespan and must meet high performance standards. Mr. Gordon added that, while buildings can last decades, rapid growth (e.g., Davis County's 3% annual increase) may outpace space needs.

Mr. Talbot presented original design goals for the Davis County Courthouse project: consolidating three courthouses, addressing security issues, maintaining one courtroom per judge, including the County Justice Court, and providing shelled courtrooms for future growth. Mr. Gordon expressed concern that the projected \$155M cost could hinder legislative approval.

As an alternative, Mr. Talbot proposed a scaled-down addition to the existing Farmington building—a two-story front expansion with up to six courtrooms, a new entry, jury port, and parking for judicial officers—with an estimated cost of \$87–\$102 million. Mr. Gordon emphasized that the judiciary cannot delay other priorities while waiting for full funding of the \$155 million project. The alternative plan reflects a cost-conscious approach while meeting essential goals and may improve legislative support.

Finally, Mr. Talbot reported that a feasibility study is underway for Cedar City to assess space needs. The estimated cost is \$55–\$65M for three courtrooms, two shelled courtrooms, and two spaces that can be repurposed.

## 7. BUDGET & GRANTS: (Karl Sweeney, Alisha Johnson)

Alisha Johnson presented the financial reports.

### FY 2025 Ongoing Turnover Savings

#		Prior Month Forecast	Actual	Forecasted	Change in Forecast
		Amount @ YE	Amount YTD	Amount @ YE	Amount @ YE
	Net Carried over Ongoing Savings (finalized from FY 2024)	140,594	140,594	140,594	-
	Ongoing Turnover Savings FY 2025 (actual year-to-date, Salary Differential only)	772,110	866,314	866,314	94,204
1	Ongoing Turnover Savings FY 2025 (forecast \$65,000 / month x 1 month, Salary Differential only)	130,000	-	65,000	(65,000)
	TOTAL SALARY RELATED ONGOING SAVINGS	1,042,704	1,006,908	1,071,908	29,204
	Benefit Differential Savings FY 2025 (will be recognized in this row starting in Q4)	78,365	85,004	85,004	6,639
	TOTAL SAVINGS	1,121,069	1,091,912	1,156,912	35,843
2	2025 Annual Authorized Hot Spot Raises	(200,000)	(200,000)	(200,000)	-
	TOTAL USES	(200,000)	(200,000)	(200,000)	-
	Total Actual/Forecasted Unencumbered Turnover Savings for FY 2025	921,069	891,912	956,912	35,843

### FY 2025 One Time Turnover Savings

#		Funding Type	Actual Amount
1	One Time Turnover Savings (from actual payroll data versus budget as of PPE 05/23/2025)	Internal Savings	2,827,624
2	Est. One Time Savings for remaining pay hours (208 @ \$1,500 / pay hour)	Internal Savings (Est.)	312,000
	Total Potential One Time Savings		3,139,624

Prior Report Totals (as of 04/11/2025)

3,159,739

## FY 2025 Year End Requests and Forecasted Available One-time Funds

Forecasted Available One-time Funds			
	Description	Funding Type	Amount
	<b>Sources of YE 2025 Funds</b>		
*	Turnover Savings as of PPE 05/23/2025	Turnover Savings	2,827,624
	Turnover savings Estimate for the rest of the year (\$1,500 x 208 pay hours)	Turnover Savings	312,000
	<b>Total Potential One Time Turnover Savings</b>		<b>3,139,624</b>
	Less: Judicial Council Delegated to State Court Administrator for Discretionary Use		(250,000)
( a )	<b>Total Potential One Time Turnover Savings Less Discretionary Use</b>		<b>2,889,624</b>
	<i>Operational Savings From TCE / AOC Budgets - mid-year forecast</i>	<i>Internal Operating Savings</i>	654,108
	<i>Operational Savings from IT Budget - unused Carryforward Request</i>	<i>Internal Operating Savings</i>	150,000
	<i>Reserve Balance (balance from FY 2024 Carryforward)</i>	<i>Judicial Council Reserve</i>	847
	<i>Unclaimed property claims (received)</i>	<i>Additional Revenue Received</i>	741,488
	<i>Prior year adjustments - impact on current year operations (Hyrum and OFA)</i>	<i>Adjustments to CY Operations</i>	(90,000)
( b )	<b>Total Operational Savings, Reserve, Unclaimed Property and Prior Year Adjustments</b>		<b>1,456,443</b>
( c )	<b>Total of Turnover Savings &amp; Operational Savings = ( a ) + ( b )</b>		<b>4,346,066</b>
	<b>Uses of YE 2025 Funds</b>		
( d )	Carryforward into FY 2026 (Anticipate request to Legislature for \$3,700,000)	<i>FY 2026 Carryforward</i>	<b>(3,700,000)</b>
	<b>Total Potential One Time Savings = ( c ) less Carryforward ( d )</b>		<b>646,066</b>
	<b>Less: Judicial Council Requests Previously Approved</b>		<b>(532,800)</b>
	<b>Less: Judicial Council Current Month Spending Requests</b>		<b>-</b>
	<b>Remaining Forecasted Funds Available for FY 2025 YE Spending Requests, CCCF, etc.</b>		<b>113,266</b>

Updated 06/04/2025

### 1. “Investing in Our People” Request

Ron Gordon expressed appreciation for the approval of the “Investing in Our People” program. The total expenditure of \$1.75 million included \$1 million in legislative appropriations, with the remaining \$750,000 funded through AOC departments’ budget savings, Xchange fees, fiscal note allocations, and hot spot funds.

### 2. Additional 3rd District Training Coordinator

Mark Paradise presented a request for an additional 3rd District Training Coordinator, primarily based on the size of the district and Judicial Assistant turnover.

**Motion:** Judge Susan Eisenman made a motion to approve the requested \$97,300 for a second Training Coordinator, as presented. Judge Cornish seconded the motion, which passed unanimously.

### 3. 8th District Probation Training Coordinator

Russell Pearson presented a request to establish a dedicated Probation Training Coordinator position for the 8th District. Currently, the district shares this role with the 7th District, but a standalone position is expected to improve efficiency and effectiveness in meeting the district’s training needs.



#### 4. Interstate Compact for Juveniles (ICJ) Funding

Sonia Sweeney requested an additional \$7,000 in funding for the Interstate Compact for Juveniles (ICJ), a program the state is statutorily required to support. The ICJ covers out-of-state costs for juvenile evaluations or treatment when no other payment source is available. Ms. Sweeney noted that last year's \$3,000 budget was nearly exhausted by a single \$2,700 evaluation. The requested increase would bring the total budget to \$10,000, with the goal of securing ongoing funding in the future.

Judge Rita Cornish added that the Budget and Fiscal Management Committee ranked this as their third priority for ongoing funding. One-time funds are available to cover the request this year, with a plan to revisit ongoing funding when feasible.

**Motion:** Judge Mettler made a motion to approve requests two and three: a Probation Training Coordinator position for the 8th District and \$7,000 in ongoing funds for the Interstate Compact for Juveniles (ICJ). Judge Cornish seconded the motion, and it passed unanimously.

#### One-time Funding Requests

Karl Sweeney presented 13 one-time funding requests to carry forward into FY26, in addition to the previously approved \$7,000 for the ICJ, making a total of 14 items. He confirmed that available funds exceed the total requested, and that none of the items are new—though some funding amounts have been slightly adjusted from the prior year.

**Motion:** Judge Thomas Low made a motion to approve the 13 additional one-time funding requests, as presented in the materials. Judge Susan Eisenman seconded the motion, which passed unanimously.

#### Grant Awards

Jordan Murray presented the Internal Control Self-Assessment (ICSA) findings for core grants, with no questions from the Council.

Nick Stiles requested approval to accept a \$10,000 grant award from the Utah Bar Foundation to support two part-time law student fellows for the Ad Hoc Committee on Regulatory Reform. He explained that the grant is low impact, for one year, and has no match requirements.

**Motion:** Judge David Mortensen made a motion to accept the grant award, as presented. Judge Mettler seconded the motion, which passed unanimously.

#### JCTST Fund Budget FY 2026

Jim Peters presented the annual funding request for the Justice Court Technology, Security, and Training (JCTST) account. This restricted account is legislatively appropriated specifically for Justice Courts and is separate from other funding sources. The Board of Justice Court Judges develops recommendations for the use of these funds, and the Budget and Fiscal Management Committee supports the current proposal.

**Motion:** Judge Eisenman made a motion to approve the use of JCTST funds as presented. Judge Cornish seconded the motion, and it passed unanimously.

## **8. ETHICS ADVISORY COMMITTEE REPORT: (Judge Laura Scott, Keisa Williams)**

Judge Laura Scott announced that she will soon be rotating off the Ethics Advisory Committee, and Judge Shaughnessy will assume the role of chair. She noted that one opinion—related to Rule 2.11—remains outstanding. The opinion was initially tabled for further discussion with the Supreme Court and has been paused again to allow new committee members time to review and provide input.

## **9. RULES FOR FINAL APPROVAL: (Keisa Williams)**

Keisa Williams presented Rules 4-111 and 4-403 for final approval. Both rules completed the public comment period without receiving any comments.

**Motion:** Judge Low made a motion to approve Rules 4-111 and 4-403 as final, with an effective date of July 1, 2025.

Justice Paige Petersen addressed an issue regarding the placement of the Supreme Court's Rules of Professional Practice within the Code of Judicial Administration. She explained that this structure creates confusion in both citation and interpretation, as the rules appear to be part of the Code—particularly on the website—even though they are separate Supreme Court rules.

Justice Petersen informed the Council that the Supreme Court plans to remove these five chapters from the Code of Judicial Administration and publish them separately as the *Supreme Court Rules of Professional Practice*, renumbered as Chapters 1 through 5. She noted that this change does not require Judicial Council approval but wanted to keep the Council informed and invite any concerns. No concerns were raised.

## **10. CERTIFICATION OF NEW JUSTICE COURT JUDGES: (Jim Peters)**

Jim Peters requested that John Hobert be certified as a Justice Court Judge to take Judge Larson's place in the Hyrum City Justice Court and reported on the process of filling eight different vacancies in the Justice Courts.

**Motion:** Judge McCullagh made a motion to certify John Hobert as a Justice Court judge. Judge Cornish seconded the motion, which passed unanimously.

## **11. PROTECTIVE ORDER TRANSLATION UPDATE: (Amy Hernandez, Janine Liebert, Jessica Vazquez-Leavitt)**

Amy Hernandez, Janine Liebert, and Jessica Vazquez-Leavitt provided an update on the translation of civil and criminal protective order forms. Before translation, the forms were updated to comply with the National Crime Information Center (NCIC) audit, address programming needs for the MyCourtCase platform, and incorporate recent legislative changes.

Judge McCullagh raised concerns about the potential need to translate user-entered Spanish responses back into English. Ms. Hernandez explained that, currently, form instructions require submissions in English due to the challenges of translation availability. Additional programming is still needed to

integrate the Spanish translations into MyCourtCase, the protective order system, CORIS, and CARE. Public release is expected in August or September.

**12. SYSTEM REVIEW UPDATE: (Ron Gordon, Neira Siaperas)**

Ron Gordon provided an update on the system review and directed the Council to the Judiciary's intranet site, which contains the full report, recommendations, and progress tracking. Recommendations are organized by category (e.g., Communication, Culture, Work Environment) and include status indicators such as "Not Yet Started," "Under Consideration," "In Progress," and "Completed."

Mr. Gordon highlighted several key findings from the review and discussed ongoing efforts to address them.

**13. APPROVAL OF 2026 JUDICIAL COUNCIL SCHEDULE: (Ron Gordon)**

The Council discussed the need to adjust the September and October 2026 meeting dates to align with the Annual Judicial Conference, and to move the January meeting to a date preceding the State of the Judiciary address on the first day of the legislative session.

**Motion:** Judge Low made a motion to approve the July Judicial Council agenda with the recommended date changes. Judge Cornish seconded the motion, and it passed unanimously.

**14. CONSENT CALENDAR: (Chief Justice Matthew B. Durrant)**

**Motion:** Judge Cornish made a motion to approve the items on the consent calendar. Judge McCullagh seconded the motion, which passed unanimously.

**15. SENIOR JUDGE APPOINTMENTS: (Neira Siaperas)**

**Motion:** Judge McCullagh made a motion to move into a closed session only to discuss the character, professional competence, or physical or mental health of an individual. Ms. Woods seconded the motion, which passed unanimously.

**16. EXECUTIVE SESSION: (Chief Justice Matthew B. Durrant)**

**Motion:** Judge Low made a motion to table Judge Lunnen's application for senior judge status for the reasons stated in executive session. Judge Cornish seconded the motion, which passed unanimously.

**Motion:** Judge Cornish made a motion finding that Judges Parker, Sainsbury, Kelly, and Campbell meet the qualifications for senior judge status.

**17. ADJOURN: (Chief Justice Matthew B. Durrant)**

The meeting was adjourned.

Tab 2

**UTAH JUDICIAL COUNCIL  
POLICY, PLANNING and TECHNOLOGY COMMITTEE  
MEETING MINUTES**

Webex video conferencing  
June 6, 2025 – 12 p.m.

**MEMBERS:**

**PRESENT**

**EXCUSED**

Judge James Gardner, <i>Chair</i>	✓	
Justice Paige Petersen	✓	
Judge Angela Fonnesbeck		✓
Judge Jon Carpenter	✓	

**GUESTS:**

Keri Sargent  
Tracy Walker  
Michael Samantha Starks  
Kaden Taylor  
Nick Stiles  
Jace Willard

**STAFF:**

Keisa Williams  
Todd Eaton  
Brody Arishita  
Cindy Schut

**(1) Welcome and approval of minutes:**

Judge Gardner welcomed the committee members to the Policy, Planning, and Technology Committee meeting (PP&T). PP&T considered the minutes from the April 18, 2025 meeting. With no changes, Judge Carpenter moved to approve the minutes as presented. Judge Gardner seconded the motion. The motion passed unanimously.

**(2) Rules back from public comment:**

- **CJA 4-206. Exhibits**
- **CJA 4-403. Electronic signature and signature stamp use**
- **CJA 4-111. Priority of post-conviction petitions in capital cases**

No public comments were received on rules 4-403 and 4-111. Two public comments were received on rule 4-206, both recommending non-substantive, clerical changes. Rule 4-206 was approved by the Council on an expedited basis with a March 14, 2025 effective date. Because the new changes to rule 4-206 are non-substantive, PP&T determined that those revisions could be added to the list of rules on the consent calendar.

***Judge Carpenter moved to recommend to the Judicial Council that rules 4-206, 4-403, and 4-111 be approved as final with a July 1, 2025 effective date. Justice Petersen seconded the motion. The motion passed unanimously.***

**(3) Non-substantive amendments:**

- **CJA 1-205. Standing and ad hoc committees**
- **CJA 4-202.02. Records classification**
- **CJA 6-501. Testing and reporting requirements for guardians and conservators**
- **CJA 4-510.06. Cases exempt from ADR rules**
- **CJA 4-613. Jail prisoner transportation**
- **CJA 4-202.03. Records access**

Recently, the Council approved amendments to 4-202.02, 4-202.03, 4-510.06, and 4-613, updating statutory references in response to legislative recodifications. Unfortunately, the recodifications do not take effect until September 1, 2025. The proposed amendments revert back to the statutory references currently in effect. Other amendments allow for clerical, non-substantive changes based on clerical or formatting errors.

***Judge Carpenter moved to send rules 1-205, 4-202.02, 6-501, 4-510.06, 4-613, and 4-202.03 to the Judicial Council with a recommendation that they be approved as final with a July 1, 2025 effective date. Justice Petersen seconded the motion. The motion passed unanimously.***

### **(3) Removing Supreme Court Chapters from the CJA:**

- **Chapter 11. General Provisions**
- **Chapter 12. Code of Judicial Conduct**
- **Chapter 13. Rules of Professional Conduct**
- **Chapter 14. Rules Governing the Utah State Bar**
- **Chapter 15. Rules Governing Licensed Paralegal Practitioners**

The Supreme Court would like to remove the Supreme Court's Rules of Professional Practice (Chapters 11—15) from the Code of Judicial Administration (CJA). Current placement under the CJA has caused confusion with staff and practitioners, as those rules are governed by the Supreme Court. The Court would like to renumber chapters 11-15 to 1-5. Citations for these chapters will then properly be SUP. CT. R. PRO. PRAC. X-XXX.

PP&T agreed that the current placement under the CJA causes confusion and moving the chapters makes sense. PP&T discussed whether this change needed formal Council approval or could be implemented administratively, ultimately determining that a Council vote wasn't necessary. Justice Petersen will draw it to the attention of the Council during PP&T's report at the next Council meeting.

***Following discussion, PP&T directed Justice Petersen to highlight the removal of the Supreme Court's Rules of Professional Practice from the Code of Judicial Administration in PP&T's report to the Judicial Council.***

### **(4) 3-413. Judicial Library Resources**

Over the past two years, Lexis Nexis has increased the cost of print publications, requiring the Law Library to seek additional funds from the Council. The Council approved the recent request for funds on the condition that the Law Library ask PP&T to review rule 3-413 and consider whether the print publications outlined in the rule are still necessary.

Prior to 2023, Legislative Services ordered print publications for the entire state, which helped keep our costs low. In 2023, they told us they would no longer do so and every agency is now required to place orders separately. In the second half of 2024, LexisNexis notified the Law Library that printed books were no longer covered under the existing contract and drastically increased the price. If the court were to order as usual, the new prices would put the Law Library \$109,000 over budget. The Law Library worked with the TCEs and appellate courts to reduce 2024 orders by \$30,000.

The Law Library polled judges and justices about their use of print publications. The results, included in the meeting materials, showed judges were primarily concerned with having annotated rule sets. PP&T discussed budget solutions, including not ordering the unannotated code, which would put the Law Library at or slightly under budget. Brody Arishita discussed digital alternatives for the unannotated code, which could be stored locally on computers or tablets. The primary challenge with digital copies is keeping them up to date.

After further discussion, PP&T agreed that eliminating the unannotated code for district and juvenile courts is a necessary budgetary decision, as the judiciary's budget is unlikely to increase.

***Judge Gardner moved to send rule 3-413 to the Judicial Council with a recommendation that it be posted for a 45-day public comment period. Judge Carpenter seconded the motion. The motion passed unanimously.***

#### **(5) CJA 3-201. Court Commissioners**

Rule 3-201(3)(J) requires new court commissioner appointments to be submitted to the Council and approved by a 2/3 vote. These appointments are always time sensitive and court staff usually end up asking the Management Committee to approve the appointments on behalf of the Council, allowing the presiding judge to formalize the job offer and move forward with the hiring process. Appointments made by the Management Committee are placed on the Council's agenda for ratification to ensure the 2/3 vote is on record. The Management Committee asked PP&T to consider whether a 2/3 vote of the Council was necessary.

The proposed amendments delegate the authority to approve court commissioner selections directly to the Management Committee, removing the need for Council approval. The Management Committee has greater flexibility to approve hires more quickly than the Council.

PP&T discussed whether approval by the Management Committee should require a 2/3 vote. The Management Committee has five members, requiring four of the five to vote in favor. After further discussion, PP&T determined that a 2/3 vote would ensure a strong consensus. If there were significant concerns, the Management Committee would likely refer the matter to the Council.

***Following further discussion, Judge Carpenter moved to send rule 3-201 to the Judicial Council with a recommendation that it be published for a 45-day public comment period. Justice Petersen seconded the motion. The motion passed unanimously.***

#### **Technology report/proposals:**

Brody Arishita provided an update on ongoing technology initiatives, particularly those related to Artificial Intelligence (AI). The AI staff workgroup finalized vision statements and guiding principles which were reviewed and refined by the legal workgroup. Work is currently underway to amend the Council's

interim rules on the use of generative AI. A key aspect of this work involves carving out clear distinctions between approved AI tools (court-purchased, closed models like Gemini Pro or Chat GPT) and generic web-based AI tools.

The Technology Advisory Committee (TAC) will meet on June 19, 2025 and Mr. Arishita will report back.

**Old Business/New Business:** The artwork policy is expected to be on PP&T's agenda after it is reviewed by the boards of judges.

**Adjourn:** With no further items for discussion, the meeting adjourned at 1:00 p.m. The next meeting will be held on July 11, 2025, at noon via Webex video conferencing.



**JUDICIAL COUNCIL'S  
BUDGET & FISCAL MANAGEMENT COMMITTEE**

**Minutes**

**June 9, 2025**

**Meeting held virtually through WebEx**

**12:00 p.m. – 1:00 p.m.**

**Members Present:**

Judge Rita Cornish (Chair)  
Judge Susan Eisenman  
Judge Michael DiReda  
Kristin Woods

**Guests:**

Brett Folkman, TCE, First District Court  
Mark Urry, TCE, Fourth District Court  
Tucker Samuelson  
Kaden Taylor  
Mark Paradise  
Russell Pearson  
Micheal Starks  
Mandy Acevedo

**Excused:**

Ron Gordon

**AOC Staff Present:**

Neira Siaperas  
Keisa Williams  
Nick Stiles  
Shane Bahr  
Jim Peters  
Sonia Sweeney  
Brody Arishita  
Todd Eaton  
Taz Hatch  
Bart Olsen  
Jermey Marsh  
Tina Sweet  
Erin Rhead  
Karl Sweeney  
Alisha Johnson  
Kelly Moreira  
Jordan Murray  
Suzette Deans, Recording Secretary

**1. WELCOME AND APPROVAL OF MINUTES (Judge Rita Cornish – “Presenter”)**

Judge Rita Cornish welcomed everyone to the meeting and asked for a motion to approve the minutes of the May 8, 2025, meeting.

**Motion:** Judge Susan Eisenman moved to approve the minutes as presented. Judge Rita Cornish seconded the motion, and it passed unanimously.

**2. FY 2025 Financials (Kelly Moreira – “Presenter”)**

FY 2025 Ongoing Turnover Savings (“OTS”) – Kelly Moreira indicated we carried over \$140,594 in ongoing savings from FY 2024 and combined with YTD savings of \$866,314 and \$85,004 of Benefits differential we have generated total OTS savings of \$1,091,912 for FY 2025 YTD. We forecast future OTS amounts of \$65,000 (1 month @ \$65K per month) for a total forecast of

OTS of \$1,156,908 that is reduced by \$200,000 for hot spot raise funds leaving a net total of \$956,912 for future discretionary use.



#### FY 2025 Ongoing Turnover Savings as of 06/04/2025 - Period 11

#		Prior Month	Forecast	Actual	Forecasted	Change in Forecast
		Amount @ YE	Amount @ YE	Amount YTD	Amount @ YE	Amount @ YE
	Net Carried over Ongoing Savings (finalized from FY 2024)	140,594		140,594	140,594	-
	Ongoing Turnover Savings FY 2025 (actual year-to-date, Salary Differential only)	772,110		866,314	866,314	94,204
1	Ongoing Turnover Savings FY 2025 (forecast \$65,000 / month x 1 month, Salary Differential only)	130,000		-	65,000	(65,000)
	<b>TOTAL SALARY RELATED ONGOING SAVINGS</b>	<b>1,042,704</b>		<b>1,006,908</b>	<b>1,071,908</b>	<b>29,204</b>
	Benefit Differential Savings FY 2025 (will be recognized in this row starting in Q4)	78,365		85,004	85,004	6,639
	<b>TOTAL SAVINGS</b>	<b>1,121,069</b>		<b>1,091,912</b>	<b>1,156,912</b>	<b>35,843</b>
2	2025 Annual Authorized Hot Spot Raises	(200,000)		(200,000)	(200,000)	-
	<b>TOTAL USES</b>	<b>(200,000)</b>		<b>(200,000)</b>	<b>(200,000)</b>	<b>-</b>
	<b>Total Actual/Forecasted Unencumbered Turnover Savings for FY 2025</b>	<b>921,069</b>		<b>891,912</b>	<b>956,912</b>	<b>35,843</b>

- \* Ongoing turnover savings only happens when a vacant position is filled at a lower rate (Salary Differential) and / or with lower benefits (Benefit Differential).
- \* We defer recognizing the Benefit Differential until Q4 of the fiscal year due to potential volatility in benefit selection in the short term. This allows time for the benefit selections for the year to normalize.  
FY 2024 full year benefit differential was +\$331,176
- \* Currently, 29.5 FTE are vacant.
- 1 Currently estimating \$65,000 of ongoing Salary Differential savings a month for the remainder of the FY; actual run rate is \$866,314 / 11 months = \$78,756 / month
- 2 Authority was delegated from the Judicial Council to the State Court Administrator/Deputy in October 2022 to expend up to \$200,000 annually.

#### Definitions:

**Salary Differential** - the annualized difference in salary and salary related benefits between a prior employee and a replacement employee. Recognized when a new employee is hired.

**Benefit Differential** - the annualized difference in medical and dental benefit cost between a prior employee and a replacement employee. Recognized in Q4 of the fiscal year and only after benefits are selected.

FY 2025 One-Time Turnover Savings – Ms. Moreira reported that our actual YTD 1x TOS is running about \$1,504 per work hour versus \$1,200 per work hour actual for full FY 2024. Our FY 2025 forecast combines the actual YTD 1x TOS per hour of \$1,504 x YTD hours (1,880) with a future forecast for the balance of the year of \$1,500 per hour x 208 hours which yields a total of \$3,139,624. Bonus payouts have lowered several recent pay period amounts.



#### FY 2025 One Time Turnover Savings - Period 11

Updated as of Pay Period Ending 05/23/2025 (1,880 out of 2,088 hours)

#		Funding Type	Actual Amount
1	One Time Turnover Savings (from actual payroll data versus budget as of PPE 05/23/2025)	Internal Savings	2,827,624
2	Est. One Time Savings for remaining pay hours (208 @ \$1,500 / pay hour)	Internal Savings (Est.)	312,000
	<b>Total Potential One Time Savings</b>		<b>3,139,624</b>

Prior Report Totals (as of 04/11/2025) 3,159,739

- 1 Actual per hour turnover savings for the last 4 pay periods (oldest to newest) are \$988.93, \$1,512.83, \$1,280.76 and \$1,696.63. The average per hour turnover savings FY 2025 YTD is \$1,504.06. The remaining 1x Hot Spot available amount of ~\$4,400 is expected to be distributed in these last 2.5 pay periods.
- 2 \$1,500 / pay hour represents slightly below the actual YTD FY 2025 average (last year average was \$1,200); raised the forecast to \$1,500 per hour from \$1,200 per hour for the balance of the year as of 3/14/25 report.

Ms. Moreira next reviewed the FY 2025 Year End Spending Requests and Forecasted Available One-Time Funds – As of period 11, as recapped on the prior schedule, the 1x TOS savings are forecasted to be \$3,139,624. After deducting \$250,000 of hot spot incentive pay, our total 1x TOS is \$2.89M. Operational savings are estimated to be \$654,108. We also included \$741,488 of unclaimed property funds and (\$90,000) of prior period adjustments to reach a net total

forecasted 1x funds of \$4.36M. We are showing \$3.7M of carryforward usage which is maxed out at the legislatively authorized amount of \$3.7M. Since we are now past the point of being able to expend monies for additional uses in FY 2025, the remaining 1x savings (after carryforward use) leaves the Courts with a forecasted surplus of \$113.3K that will be used for increasing carryforward amounts in other Court areas or contributed to the CCCF.



## FY 2025 Year End Requests and Forecasted Available One-time Funds - Period 11

Forecasted Available One-time Funds			# One-time Spending Plan Requests	Adjusted Requests Amount	Judicial Council Approved Amount
Description	Funding Type	Amount			
<b>Sources of YE 2025 Funds</b>					
* Turnover Savings as of PPE 05/23/2025	Turnover Savings	2,827,624	1** Various Construction Projects (FY 2025) Contingency (10%) (NOT NEEDED)	\$ -	-
Turnover savings Estimate for the rest of the year (\$1,500 x 208 pay hours)	Turnover Savings	312,000	2 All Rise Utah Welcome Dinner	\$ -	10,000
<b>Total Potential One Time Turnover Savings</b>		<b>3,139,624</b>	3 Q1 / Q2 Performance Bonus	\$ -	156,000
Less: Judicial Council Delegated to State Court Administrator for Discretionary Use		(250,000)	4 Replacement of EMV Credit Card Devices	\$ -	36,500
<b>(a) Total Potential One Time Turnover Savings Less Discretionary Use</b>		<b>2,889,624</b>	5 Reimbursement from Trust Account Interest Earnings	\$ -	(36,500)
Operational Savings From TCE / AOC Budgets - mid-year forecast	Internal Operating Savings	654,108	6 Purchasing Utah Code and Court Rules per CIA 3-413	\$ -	30,000
Operational Savings from IT Budget - unused Carryforward Request	Internal Operating Savings	150,000	7 Bridge Replacement LMS System Go-Live	\$ -	27,700
Reserve Balance (balance from FY 2024 Carryforward)	Judicial Council Reserve	847	8 Increase in Secondary Language Stipend	\$ -	9,100
Unclaimed property claims (received)	Additional Revenue Received	741,488			
Prior year adjustments - impact on current year operations (Hyrum and OFA)	Adjustments to CY Operations	(90,000)			
<b>(b) Total Operational Savings, Reserve, Unclaimed Property and Prior Year Adjustments</b>		<b>1,456,443</b>	<b>Current Month One-time Spending Requests</b>	-	
<b>(c) Total of Turnover Savings &amp; Operational Savings = (a) + (b)</b>		<b>4,346,066</b>	<b>Previously Approved 1x FY 2024 YE Spending Request</b>		<b>532,800</b>
<b>Uses of YE 2025 Funds</b>					
(d) Carryforward into FY 2026 (Anticipate request to Legislature for \$3,700,000)	FY 2026 Carryforward	(3,700,000)			
<b>Total Potential One Time Savings = (c) less Carryforward (d)</b>		<b>646,066</b>			
<b>Less: Judicial Council Requests Previously Approved</b>		<b>(532,800)</b>			
<b>Less: Judicial Council Current Month Spending Requests</b>		<b>-</b>			
<b>Remaining Forecasted Funds Available for FY 2025 YE Spending Requests, CCCF, etc.</b>		<b>113,266</b>			

Updated 06/04/2025

\* Actual per hour turnover savings for the last 4 pay periods (oldest to newest) are \$988.93, \$1,512.83, \$1,280.76 and \$1,696.63.

The average per hour turnover savings FY 2025 YTD is \$1,504.06.

(b) Operational Savings from TCE / AOC Budgets have been updated. Due to inflation, we expect minimal further operational savings for the rest of the fiscal year.

FY 2024 operational savings were \$1.3M.

\*\* Construction contingency request of \$451,000 is no longer needed as per Chris Talbot. Construction costs have come in under budget.

The FY 2026 carryforward and Ongoing Requests below show the amounts that have been approved for use in the Investing in our People initiatives. We will be going through the requests shown in blue during the next part of this meeting.



## FY 2026 Carryforward and Ongoing Requests - Period 11, FY 2025

6/4/2025

### Funding Sources

	One Time	Ongoing
Ongoing Turnover Savings carried over from FY 2024		\$ 140,594
Forecasted YE Ongoing Turnover Savings from FY 2025		\$ 1,016,318
Subtotal		\$ 1,156,912
Unobligated Fiscal Note Funds - District Court (net)	\$ (10,500)	\$ 20,800
Unobligated Fiscal Note Funds - Juvenile Court	\$ (5,200)	\$ 15,700
Unobligated Fiscal Note Funds - Admin	\$ -	\$ 1,000,000
Additional Legislative Appropriation		
Wellness Council Portion of Carryforward		
Expected Carryforward Amount from Fiscal Year 2025	\$ 3,700,000	\$ -
Total Available Funding	\$ 3,684,300	\$ 2,193,412
Less: Judicial Council Delegated to State Court Administrator for Discretionary Use		\$ (200,000)
Less: Director of Finance and State Court Admin. Reserves to meet Investing in our People Commitments	\$ (100,000)	\$ (100,000)
Net Ongoing TOS Available for Use	\$ 3,584,300	\$ 1,893,412

### Ongoing Requests

	Presented		Judicial Council Approved	
	One Time	Ongoing	One Time	Ongoing
1 Investing in Our People - Ron Gordon and Neira Siaperas		\$ 1,745,900		\$ 1,745,900
2 Additional Training Coordinator - 3rd District - Mark Paradise		\$ 97,300		
3 8th District Probation Officer - Russ Pearson		\$ 42,500		
4 8th District Probation Training Coordinator - Russ Pearson		\$ 90,000		
5 ICI Expenses - Sonia Sweeney		\$ 7,000		
Subtotal	\$ -	\$ 1,982,700	\$ -	\$ 1,745,900
Balance Remaining After Judicial Council Approvals			\$ 3,584,300	\$ 147,512
Balance Remaining Inclusive of "Presented"	\$ 3,584,300	\$ (89,288)		

### Carryforward One Time Requests

	Presented		Judicial Council Approved	
	One Time	Ongoing	One Time	Ongoing
1 Investing in Our People - Ron Gordon and Neira Siaperas	\$ 1,334,600		\$ 1,334,600	
2* Courts Eco Pass Program - Karl Sweeney	\$ 60,000			
3* Education Assistance Program - Kelly Moreira	\$ 85,000			
4* HR Applicant Tracking - Jeremy Marsh	\$ 20,900			
5* IT Stipend for Technology Subject Matter Experts - Todd Eaton and Taz Hatch	\$ 65,000			
6* IT Replacement Inventory - Todd Eaton	\$ 200,000			
7* Network / System Maintenance - Staff Augmentation - Todd Eaton and Chris Talbot	\$ 150,000			
8* IT Webex Virtual Hearing Improvement Project - Brody Arishita	\$ 150,000			
9* Retention of Contract Developers - Brody Arishita	\$ 682,000			
10* Base Employee Incentive Awards - Bart Olsen, Erin Rhead, and Alisha Johnson	\$ 280,000			
11* Wellness Program - Tava - Neira Seripas	\$ 103,100			
12* FY 26 Q1/Q2 (paid in 12/2025) Performance Bonus - Bart Olsen and Karl Sweeney	\$ 400,000			
13* Utah Code Purchase - Kaden Taylor	\$ 35,000			
Subtotal	\$ 3,565,600	\$ -	\$ 1,334,600	\$ -
Balance Remaining After Judicial Council Approvals			\$ 2,249,700	\$ 147,512
+ Balance Remaining Inclusive of "Presented"	\$ 18,700	\$ (89,288)		
Prior Report Balances (as of 5/5/2025)	\$ 2,349,700	\$ 152,263		

#### LEGEND

Highlighted items are currently being presented to the Budget and Fiscal Management Committee.

Highlighted items have been approved by the BFMC and are on track for being presented to the Judicial Council.

Highlighted items have been previously approved by the Judicial Council.

Highlighted items that are Fiscal Note Funds

\* - Items have been presented and approved in prior years.

+ - One-time balance remaining is available to go into Judicial Council reserve. Ongoing balance remaining will be included in the beginning balance for ongoing turnover savings.

\* - Request to Legislature was Not Funded

BFMC approval to submit request to Judicial Council does not imply Judicial Council must approve the recommendation.

If more funds are available than the total of requests received, prioritization is optional.

## Ongoing Funding Requests

### 2. 3rd District Additional Training Coordinator (Mark Paradise "Presenters")

Mark Paradise is requesting \$97,300 in ongoing funds for an additional training coordinator.

Statistics obtained from the Courts Human Resources Department show that the Third District has had one of the highest turnover rates throughout the state courts, with an average turnover rate from 2022-2024 at 28% for our judicial assistant position. This rate equates to

approximately 38 new judicial assistants each year. This directly correlates to an ongoing need for training resources in the Third district as the number of staff is more than double that of any other district.

**Motion:** Judge Susan Eisenman made a motion to recommend the request be forwarded to the Judicial Council with a recommendation for approval and immediate funding. Kristin Woods seconded the motion, and it passed unanimously.

### **3. 8th District Additional Probation Officer (Russell Pearson “Presenters”)**

Request was pulled from consideration by Mr. Pearson.

### **4. 8th District Probation Training Coordinator (Russell Pearson “Presenters”)**

Russell Pearson is requesting \$90,000 to fund an 8<sup>th</sup> district training coordinator. The Statewide Juvenile Court Probation Department has identified a need for increased quality control and training in each individual district. Phase II of the System Review also highlighted the need for Training Coordinators and additional training of staff. While the AOC Program coordinators do a fine job with quality assurance and site visits, the in-depth process requires extended time to complete. The creation of a district level training and program coordinator position will alleviate this need and provide timely quality assurance while assisting the Probation Supervisor with coaching on assessments, case plans, notes etc.

**Motion:** Judge Susan Eisenman made a motion to approve the adjusted funding amount of \$52,500 (\$90,000 - \$37,500 from a vacant position) and forward the request to the Judicial Council with a recommendation for approval. Judge Rita Cornish seconded the motion, and it passed unanimously. After further discussion the committee decided that this request would be forwarded to the Judicial Council with a recommendation that funding be deferred until FY 2026 when ongoing funds are available.

### **5. ICJ Increased Expenses – Juvenile Court (Sonia Sweeney “Presenters”)**

Sonia Sweeney is requesting \$7,000 for Interstate Compact for Juveniles (ICJ) expenses related to out-of-state evaluations and treatment. Utah is a member of the ICJ as outlined in Utah Code 80-6-11. Prior to last year, the Council funded ICJ expenses for annual dues and other ICJ expenses with one-time funds. As a member of the ICJ, the state of Utah is responsible for adhering to all compact requirements.

A discussion ensued to approve the ICJ expenses both as a carry forward one-time expense for FY 2026 since those funds are available now and approve it as an ongoing expenditure when funds are available in FY 2026.

This resulted in the splitting of the requests into 2 groups: Group 1 consisting of the 3<sup>rd</sup> district training coordinator to be recommended for approval and immediate funding; Group 2

consisting of the 8th district Training Coordinator (\$52,500) and the ongoing ICJ expenses (\$7,000) to be recommended for approval and deferred funding when sufficient ongoing funds are available in FY 2026.

**Motion:** Judge Michael DiReda made a motion to adopt the priority order with the adjusted amounts as discussed and forward them on to the Judicial Council with a recommendation to approve. Susan Eisenman seconded the motion, it passed unanimously.

	Presented		Judicial Council Approved	
	One Time	Ongoing	One Time	Ongoing
1 Investing in Our People - Ron Gordon and Neira Slaperas		\$ 1,745,900		\$ 1,745,900
2 Additional Training Coordinator - 3rd District - Mark Paradise		\$ 97,300		
4 8th District Probation Training Coordinator - Russ Pearson		\$ 52,500		
<b>Subtotal</b>	\$ -	\$ 1,895,700	\$ -	\$ 1,745,900
<b>Balance Remaining After Judicial Council Approvals</b>			\$ 3,584,300	\$ 147,312
<b>Balance Remaining Inclusive of "Presented"</b>	\$ 3,584,300	\$ (2,288)		
<b>Carryforward One Time Requests</b>				
	Presented		Judicial Council Approved	
	One Time	Ongoing	One Time	Ongoing
1 Investing in Our People - Ron Gordon and Neira Slaperas	\$ 1,334,600		\$ 1,334,600	
2* Courts Eco Pass Program - Karl Sweeney	\$ 60,000			
3* Education Assistance Program - Kelly Moreira	\$ 85,000			
4* HR Applicant Tracking - Jeremy Marsh	\$ 20,900			
5* IT Stipend for Technology Subject Matter Experts - Todd Eaton and Taz Hatch	\$ 65,000			
6* IT Replacement Inventory - Todd Eaton	\$ 200,000			
7* Network / System Maintenance - Staff Augmentation - Todd Eaton and Chris Talbot	\$ 150,000			
8* IT Webex Virtual Hearing Improvement Project - Brody Arishita	\$ 150,000			
9* Retention of Contract Developers - Brody Arishita	\$ 682,000			
10* Base Employee Incentive Awards - Bart Olsen, Erin Rhead, and Alisha Johnson	\$ 280,000			
11* Wellness Program - Tavis Neira Slaperas	\$ 103,100			
12* FY 26 Q1/Q2 (paid in 12/2025) Performance Bonus - Bart Olsen and Karl Sweeney	\$ 400,000			
13* Utah Code Purchase - Kaden Taylor	\$ 35,000			
ICJ Expenses - Sonia Sweeney	\$ 7,000			
<b>Subtotal</b>	\$ 3,572,600	\$ -	\$ 1,334,600	\$ -
<b>Balance Remaining After Judicial Council Approvals</b>			\$ 2,249,700	\$ 147,312
<b>Balance Remaining Inclusive of "Presented"</b>	\$ 11,700	\$ (2,288)		
<b>Prior Report Balances (as of 5/5/2025)</b>	\$ 2,349,700	\$ 152,263		

### Carryforward into FY 2026 1x Funding Requests

#### **2. Courts Eco Pass Program (Suzette Deans and Karl Sweeney "Presenters")**

We are requesting one-time carryforward funds to continue a public transit program that is (1) open to all employees but targeted to benefit those who use public transportation most, (2) state-wide (not just UTA), and (3) has a manageable administrative cost. The new Eco-Pass program was offered by UTA which offered a monthly pass at \$59 per person. We have gradually raised the reimbursement to 90% which provides a good balance between affordability (\$6 per person per month is the employee cost) and cost to the court (which is only \$5,000 per month, less than ½ the cost of the old Eco-Pass).

#### **3. Education Assistance Program Funding (Kelly Moreira "Presenter")**

Alisha Johnson is requesting \$85,000 to fund the Education Assistance Program. All benefitted Court employees are eligible to apply for this benefit. HR policy currently in effect specifies the educational pursuit must be an evident benefit to the Courts and have approval of the Court Executive or Director. The employee enters into an Education Assistance Contract prior to the beginning of the course and may be reimbursed for their costs (tuition and fees) at the successful conclusion of the course (successful means a final GPA of 2.0 or better). If the employee leaves the Courts within 12 months of receiving an

Educational Assistance reimbursement, HR policy allows the Courts to ask that the departed employee repay any education assistance money received within the 12-month period after departure.

#### **4. HR Applicant Tracking (Jeremy Marsh “Presenter”)**

Jeremy Marsh is requesting \$20,000 to fund the final year of funding for our Applicant Tracking/Recruitment and Onboarding solutions iSolved (formerly ApplicantPRO) and HireForms. These tools are critical components in meeting essential business needs of the Utah judiciary when it comes to filling vacant non-judicial positions.

The Executive Branch’s new system, Vantage, is expected to launch in December 2025. Until then, we hope to maintain our current systems to ensure the secure handling of personally identifiable information (PII), prevent data loss during the transition, and avoid the risks of reverting to manual or outdated methods. Continuing this system provides stability and critical protection of sensitive information as we prepare for Vantage.

#### **5. IT Stipend for Technology Subject Matter Experts (Todd Eaton and Taz Hatch “Presenters”)**

Todd Eaton is requesting \$65,000 for IT stipend for Tech subject matter expertise. In FY 2025, the funding request was adjusted from the original \$78,000 (for 30 employees) to \$65,000 (for 25 employees). The program has been successful, delivering value to the 25+ sites served by TSMEs and providing crucial support to the Service Desk. TSMEs provide hands-on support as needed and handle a growing number of local tickets each month, reducing the demand on the Service Desk. The stipend is set at \$100 per pay period and based on the program’s success in FY25, we request \$65,000 for the 26 pay periods in FY26. (Total is 26 pay periods x 25 employees x \$100 = \$65,000)

#### **6. IT Replacement Inventory (Todd Eaton “Presenter”)**

Todd Eaton is requesting \$200,000 for IT inventory replacement. This \$200,000 request will support the replacement of various equipment, including laptops, scanners, printers, notebooks, and other peripherals that enhance court staff productivity. This funding allows us to maintain our established five-year laptop replacement cycle and address the replacement of other essential peripherals as they reach end-of-life or experience failure.

#### **7. IT Network/System Maintenance – Staff Augmentation (Todd Eaton and Chris Talbot “Presenters”)**

Todd Eaton is requesting \$150,000 for network/system maintenance staff. This request establishes a fund for maintenance, repairs, and other non-technical tasks statewide,

ensuring IT staff can stay focused on higher-value work. By leveraging vendors on state contracts, this funding provides ongoing support without diverting IT resources. It covers labor, travel, and necessary hardware. The efficiencies enabled by this funding should be maintained.

#### **8. IT Webex Virtual Hearing Improvement Project (Brody Arishita “Presenter”)**

Brody Arishita is requesting \$150,000 for IT WebEx virtual hearing improvement. Currently Clerical staff for District and Justice Courts must create a case calendar note that a clerk copies from Webex by using the link needed to join the meeting/webinar. This link is then manually copied and pasted to show the Webex link on the courts’ website for hearings. Per the Clerks of Court, this is a “huge” time consumer. This request is for funds to create a more streamlined process for programming the meeting/webinar link by making functionality changes to Judicial Workspace and Coris that allow the clerk to add the link to one or multiple cases/hearings. This will greatly simplify the current process. There would also be enhancements to the website to connect to the Webex API (Application Programming Interface) for meeting/webinar information.

#### **9. IT Retention of Contract Developers (Brody Arishita “Presenter”)**

Brody Arishita is requesting \$682,000 in funding for Contractor Support for Senior Project Manager/Developer training and Critical IT Projects. This request for retaining our current experienced contract developers is critical for the success of IT, the Courts, Senior Project Managers (SPMs) and our ability to deliver essential development projects for the courts. These long-term contractors possess a diverse range of skills that allow us to adopt an agile approach, deploying the necessary expertise based on each project. Their continued involvement is crucial for ongoing development in key areas like CORIS Rewrite, Judicial Workspace and Xchange. Funding their positions is not only vital for SPMs, but also essential to the Courts' commitment to advancements like e-filing, MyCase, OCAP, and ODR and modernization of existing Court applications (e.g. CORIS, CARE, and Judicial Workspace).

#### **10. Base Employee Incentive Awards (Bart Olsen, Erin Rhead, Alisha Johnson “Presenters”)**

Bart Olsen is requesting \$280,000 for base employee incentive awards. The Courts have established a program to provide on-the-spot recognition for outstanding service as well as a formal nomination process to reward employees for their service in the following ways:

- An innovative idea or suggestion, implemented by the courts, which improves operations or results in cost savings
- The exercise of leadership beyond that normally expected in the employee’s assignment
- An action which brings favorable public or professional attention to the courts
- Successful completion of an approved special individual or team project



- Continually outstanding performance of normal responsibilities

The incentive can be issued in cash or a gift card. If deserved, a single employee can receive multiple incentive awards each year.

#### **11. Wellness Program – Tava (Neira Siaperas “Presenter”)**

Neira Siapers is requesting \$103,100 for the employee wellness program. In 2023, the AOC established a Statewide Wellness Steering Committee (the “Committee”) to make recommendations regarding employee wellness. The Committee recommended that state court employees have access to the same wellness resources (Tava Health) recently offered by the Utah State Bar to all members of the Bar (meaning that judicial officers and all court employees who are members of the Utah State Bar already have access to these resources). These resources included six free online therapy sessions per year (with some in-person session availability) and an app that provides access to daily wellness tracking and evaluation, recommendations, and wellness education.

#### **12. FY 2026 Q1/Q2 Performance Bonus Payments (Bart Olsen and Karl Sweeney “Presenters”)**

Karl Sweeney is requesting \$400,000 for Performance Bonus Payments. Because of the importance of regularly recognizing high performing employees, we are requesting \$400,000 be funded for the first two quarters of FY 2026 through carryforward funds. Because these funds are already available, approving this request will ensure that FY 2026 Q1/Q2 performance bonus payments can be made (generally these payments go out in December). Performance Bonuses are based on completion of milestones in performance expectations. Payment of Performance Bonuses is a critical piece of the Court’s compensation strategy. However, request amounts may vary year to year depending on the (1) amount of 1x Turnover Savings and (2) the competing demands for those funds.

#### **13. Utah Code Purchase (Kaden Taylor “Presenter”)**

Kaden Taylor is requesting \$35,000 in funding for the Purchase of Utah Code and Court Rules. CJA 3-413 outlines that the court administrator will provide copies of the code and court rules to each courtroom in the state and each appellate judge.

**Motion:** Judge Rita Cornish made a motion to approve the carryforward 1x fund requests and recommended they forwarded to the Judicial Council with a recommendation for approval. Kristen Woods seconded the motion, and it passed unanimously.

#### **4. JCTST Fund Budget FY 2026 (James Peters “Presenter”)**

James Peters presented the JCTST fund budget for FY 2026. The Budget shows how funding from the justice Court technology security and training account would be allocated for the coming fiscal year.

**Motion:** Judge Rita Cornish made a motion to adopt the Board of Justice Court Judges' recommendations and forward to the Judicial Council with a recommendation for approval. Judge Micheal DiReda seconded the motion, and it passed unanimously.

#### **5. Court Grants – FY 2024 Internal Control Self-Assessment (Jordan Murray “Presenter”)**

Jordan Murray gave an overview of the ICSA for FY 2024. This is our annual review process that's required by UCJA rule 3-411, the grants rule, and it's designed to ensure that we maintain strong internal controls. We remain compliant with our grant policies.

**Motion:** Judge Susan Eisenman made a motion to recommend the request be forwarded to the Judicial Council. Judge Rita Cornish seconded the motion, and it passed unanimously.

#### **6. Request to Accept Grant Award (Jordan Murray and Nick Stiles “Presenters”)**

Nick Stiles is requesting approval to accept a \$10,000 grant from the Utah State Bar.

**Motion:** Kristin Woods made a motion to recommend acceptance of the grant funds and forward to the Judicial Council with a recommendation for approval. Judge Susan Eisenman seconded the motion, and it passed unanimously.

#### **7. Old Business/New Business**

##### **A. Preview of FY 2026 Period 1 Financials with Changes for Investing in our People (Karl Sweeney “Presenter”)**

Karl Sweeney gave the committee of preview of some new FY26 financial schedules that will assist BFMC in tracking ongoing commitments against ongoing funds available. These new schedules are necessary to ensure the Investing in our People funding is put as a first priority in FY 2026.



## FY 2026 Ongoing Turnover Savings as of 07/XX/2025 - Period 1

#	Prior Month Amount @ YE	Forecast Amount @ YE	Actual Amount YTD	Forecasted Amount @ YE	Change in Forecast Amount @ YE
			247,512	247,512	247,512
			25,000	25,000	25,000
1			-	600,000	600,000
			272,512	872,512	872,512
			-	-	-
			272,512	872,512	872,512
2			(100,000)	(100,000)	
3			(370,000)	(370,000)	
4			(200,000)	(200,000)	(200,000)
			(670,000)	(670,000)	(670,000)
5			(397,488)	202,512	202,512

- Currently estimating \$50,000 of ongoing Salary Differential savings a month for the remainder of the FY  
This reserve provides a cushion should our forecast of ongoing TOS prove to be too optimistic; it also raises the bar for accumulating Actual Ongoing TOS before other approved but not funded
- Ongoing TOS Requests can be funded.
- Based on 135 core workforce new hires in FY 2025 that are eligible for a \$1 pay raise in FY 2026. Impact includes benefits at 30%.
- Authority was delegated from the Judicial Council to the State Court Administrator/Deputy in October 2022 to expend up to \$200,000 annually.
- This number (in ACTUAL column) needs to be positive before funding other approved but not funded Ongoing TOS Requests can be funded.**

### Definitions:

**Salary Differential** - the annualized difference in salary and salary related benefits between a prior employee and a replacement employee.  
Recognized when a new employee is hired.

**Benefit Differential** - the annualized difference in medical and dental benefit cost between a prior employee and a replacement employee.  
Recognized in Q4 of the fiscal year and only after benefits are selected.

Next meeting July 7, 2025

Meeting adjourned at 1:15 p.m.

Tab 3

**Budget and Grants Agenda  
For July 21, 2025  
Judicial Council Meeting**

1. Monthly YTD Financials ..... Alisha Johnson  
(Item 1 – Information)
2. Carryforward 1x Turnover Savings Request ..... Karl Sweeney  
(Item 2 – Action)
14. All Rise Dinner ..... Jon Puente
3. Request to Seek Grant Award for Treatment Courts Conferences ..... Katy Burke, Jordan Murray  
(Item 3 – Action)

# Item 1



## FY 2025 Ongoing Turnover Savings as of 07/01/2025 - Period 12

#		Prior Month	Forecast	Actual	Forecasted	Change in Forecast
		Amount @ YE		Amount YTD	Amount @ YE	Amount @ YE
	Net Carried over Ongoing Savings (finalized from FY 2024)	140,594		140,594	140,594	-
	Ongoing Turnover Savings FY 2025 (actual year-to-date, Salary Differential only)	866,314		903,348	903,348	37,034
1	Ongoing Turnover Savings FY 2025 (forecast \$65,000 / month x 0 month, Salary Differential only)	65,000		-	-	(65,000)
	TOTAL SALARY RELATED ONGOING SAVINGS	1,071,908		1,043,942	1,043,942	(27,966)
	Benefit Differential Savings FY 2025 (will be recognized in this row starting in Q4)	85,004		115,119	115,119	30,115
	TOTAL SAVINGS	1,156,912		1,159,061	1,159,061	2,149
2	2025 Annual Authorized Hot Spot Raises	(200,000)		(200,000)	(200,000)	-
	TOTAL USES	(200,000)		(200,000)	(200,000)	-
<b>Total Actual/Forecasted Unencumbered Turnover Savings for FY 2025</b>		<b>956,912</b>		<b>959,061</b>	<b>959,061</b>	<b>2,149</b>

- \* Ongoing turnover savings only happens when a vacant position is filled at a lower rate (Salary Differential) and / or with lower benefits (Benefit Differential).
- \* We defer recognizing the Benefit Differential until Q4 of the fiscal year due to potential volatility in benefit selection in the short term.  
This allows time for the benefit selections for the year to normalize.  
FY 2024 full year benefit differential was +\$331,176
- \* Currently, 22.5 FTE are vacant.
- 1 Currently estimating \$65,000 of ongoing Salary Differential savings a month for the remainder of the FY; actual run rate is \$903,348 / 12 months = \$75,279 /month
- 2 Authority was delegated from the Judicial Council to the State Court Administrator/Deputy in October 2022 to expend up to \$200,000 annually.

### Definitions:

**Salary Differential** - the annualized difference in salary and salary related benefits between a prior employee and a replacement employee.  
Recognized when a new employee is hired.

**Benefit Differential** - the annualized difference in medical and dental benefit cost between a prior employee and a replacement employee.  
Recognized in Q4 of the fiscal year and only after benefits are selected.



## FY 2025 One Time Turnover Savings - Period 12

Updated as of Pay Period Ending 06/20/2025 (2,040 out of 2,088 hours)

			Actual
#		Funding Type	Amount
1	One Time Turnover Savings (from actual payroll data versus budget as of PPE 06/20/2025)	Internal Savings	3,000,760
2	Est. One Time Savings for remaining pay hours (48 @ \$1,500 / pay hour)	Internal Savings (Est.)	72,000
<b>Total Potential One Time Savings</b>			<b>3,072,760</b>

*Prior Report Totals (as of PPE 05/23/2025)*

3,139,624

- 1 Actual per hour turnover savings for the last 4 pay periods (oldest to newest) are \$1,262.46, \$1,552.80, \$1,533.67, and \$798.31.  
The average per hour turnover savings FY 2025 YTD is \$1,470.96  
The remaining 1x Hot Spot available amount of ~\$4,400 is expected to be distributed in these last pay period.
- 2 \$1,500 / pay hour represents slightly above the actual YTD FY 2025 average (last year average was \$1,200);  
The forecast was raised to \$1,500 per hour from \$1,200 per hour for the balance of the year as of 3/14/25 report.





## FY 2025 Year End Requests and Forecasted Available One-time Funds - Period 12

Forecasted Available One-time Funds						
	Description	Funding Type	Amount	#	One-time Spending Plan Requests	Adjusted Requests Amount
	<b>Sources of YE 2025 Funds</b>					Judicial Council Approved Amount
*	Turnover Savings as of PPE 06/20/2025	Turnover Savings	3,000,760	1**	Various Construction Projects (FY 2025) Contingency (10%) (NOT NEEDED)	\$ -
	Turnover savings Estimate for the rest of the year (\$1,500 x 48 pay hours)	Turnover Savings	72,000	2	All Rise Utah Welcome Dinner	\$ -
	<b>Total Potential One Time Turnover Savings</b>		<b>3,072,760</b>	3	Q1 / Q2 Performance Bonus	\$ -
	Less: Judicial Council Delegated to State Court Administrator for Discretionary Use		(250,000)	4	Replacement of EMV Credit Card Devices	\$ -
(a)	<b>Total Potential One Time Turnover Savings Less Discretionary Use</b>		<b>2,822,760</b>		Reimbursement from Trust Account Interest Earnings	\$ -
	Operational Savings From TCE / AOC Budgets - mid-year forecast	Internal Operating Savings	654,108	5	Purchasing Utah Code and Court Rules per CJA 3-413	\$ -
	Operational Savings from IT Budget - unused Carryforward Request	Internal Operating Savings	150,000	6	Mitigate Laptop Price Increases	\$ -
	Reserve Balance (balance from FY 2024 Carryforward)	Judicial Council Reserve	847	7	Bridge Replacement LMS System Go-Live	\$ -
	Unclaimed property claims (received)	Additional Revenue Received	741,488	8	Increase in Secondary Language Stipend	\$ -
	Prior year adjustments - impact on current year operations (Hyrum and OFA)	Adjustments to CY Operations	(90,000)			
(b)	<b>Total Operational Savings, Reserve, Unclaimed Property and Prior Year Adjustments</b>		<b>1,456,443</b>		<b>Current Month One-time Spending Requests</b>	<b>-</b>
(c)	<b>Total of Turnover Savings &amp; Operational Savings = (a) + (b)</b>		<b>4,279,203</b>		<b>Previously Approved 1x FY 2024 YE Spending Request</b>	<b>532,800</b>
	<b>Uses of YE 2025 Funds</b>					
(d)	Carryforward into FY 2026 (Anticipate request to Legislature for \$3,700,000)	FY 2026 Carryforward	(3,700,000)			
	<b>Total Potential One Time Savings = (c) less Carryforward (d)</b>		<b>579,203</b>			
	<b>Less: Judicial Council Requests Previously Approved</b>		<b>(532,800)</b>			
	<b>Less: Judicial Council Current Month Spending Requests</b>		<b>-</b>			
	<b>Remaining Forecasted Funds Available for FY 2025 YE Spending Requests, CCCF, etc.</b>		<b>46,403</b>			

Updated 07/02/2025

\* Actual per hour turnover savings for the last 4 pay periods (oldest to newest) are \$1,262.46, \$1,552.80, \$1,533.67, and \$798.31.

The average per hour turnover savings FY 2025 YTD is \$1,470.96

(b) Operational Savings from TCE / AOC Budgets have been updated. Due to inflation, we expect minimal further operational savings for the rest of the fiscal year.

FY 2024 operational savings were \$1.3M.

\*\* Construction contingency request of \$451,000 is no longer needed as per Chris Talbot. Construction costs have come in under budget.



## FY 2026 Carryforward and Ongoing Requests - Period 12, FY 2025

7/2/2025

### Funding Sources

	One Time	Ongoing
Ongoing Turnover Savings carried over from FY 2024		\$ 140,594
Forecasted YE Ongoing Turnover Savings from FY 2025		\$ 1,018,467
<b>Subtotal</b>		<b>\$ 1,159,061</b>
Unobligated Fiscal Note Funds - District Court (net)	\$ (10,500)	\$ 20,800
Unobligated Fiscal Note Funds - Juvenile Court	\$ (5,200)	\$ 15,700
Unobligated Fiscal Note Funds - Admin	\$ -	\$ -
Additional Legislative Appropriation	\$ -	\$ 1,000,000
Wellness Council Portion of Carryforward		
<b>Expected Carryforward Amount from Fiscal Year 2025</b>	<b>\$ 3,700,000</b>	<b>\$ -</b>
Total Available Funding	\$ 3,684,300	\$ 2,195,561
Less: Judicial Council Delegated to State Court Administrator for Discretionary Use		\$ (200,000)
Less: Director of Finance and State Court Admin. Reserves to meet Investing in our People Commitments	\$ (100,000)	\$ (100,000)
<b>Net Ongoing TOS Available for Use</b>	<b>\$ 3,584,300</b>	<b>\$ 1,895,561</b>

### Ongoing Requests

#### Recommend Approve and Fund Immediately

	Presented		Judicial Council Approved	
	One Time	Ongoing	One Time	Ongoing
1 Investing in Our People - Ron Gordon and Neira Siaperas		\$ 1,745,900		\$ 1,745,900
2 Additional Training Coordinator - 3rd District - Mark Paradise - Fund now		\$ 97,300		\$ 97,300
<b>Subtotal to Approve and Fund Immediately</b>	<b>\$ -</b>	<b>\$ 1,843,200</b>	<b>\$ -</b>	<b>\$ 1,843,200</b>
Balance Remaining After Judicial Council Approvals				\$ 52,361
Balance Remaining Inclusive of "Presented"		\$ 52,361		

#### Recommend Approve and Defer Funding

(hold until Ongoing Funding net of Commitments / Reserves Exceeds Requested Amounts)

3 8th District Probation Training Coordinator - Russ Pearson	\$ 52,500
4 ICJ Expenses - Sonia Sweeney	\$ 7,000
<b>Subtotal to Defer Funding until FY 2026</b>	<b>\$ -</b>

### Carryforward One Time Requests

	Presented		Judicial Council Approved	
	One Time	Ongoing	One Time	Ongoing
1 Investing in Our People - Ron Gordon and Neira Siaperas	\$ 1,334,600		\$ 1,334,600	
2* Courts Eco Pass Program - Karl Sweeney	\$ 60,000		\$ 60,000	
3* Education Assistance Program - Kelly Moreira	\$ 85,000		\$ 85,000	
4* HR Applicant Tracking - Jeremy Marsh	\$ 20,900		\$ 20,900	
5* IT Stipend for Technology Subject Matter Experts - Todd Eaton and Taz Hatch	\$ 65,000		\$ 65,000	
6* IT Replacement Inventory - Todd Eaton	\$ 200,000		\$ 200,000	
7* Network / System Maintenance - Staff Augmentation - Todd Eaton and Chris Talbot	\$ 150,000		\$ 150,000	
8* IT Webex Virtual Hearing Improvement Project - Brody Arishita	\$ 150,000		\$ 150,000	
9* Retention of Contract Developers - Brody Arishita	\$ 682,000		\$ 682,000	
10* Base Employee Incentive Awards - Bart Olsen, Erin Rhead, and Alisha Johnson	\$ 280,000		\$ 280,000	
11* Wellness Program - Tava - Neira Seripas	\$ 103,100		\$ 103,100	
12* FY 26 Q1/Q2 (paid in 12/2025) Performance Bonus - Bart Olsen and Karl Sweeney	\$ 400,000		\$ 400,000	
13* Utah Code Purchase - Kaden Taylor	\$ 35,000		\$ 35,000	
X ICJ Expenses - Sonia Sweeney (See ongoing Approve and Defer above)	\$ 7,000		\$ 7,000	
14* Annual All Rise Outreach - Jonathan Puente	\$ 11,000			
<b>Subtotal</b>	<b>\$ 3,583,600</b>	<b>\$ -</b>	<b>\$ 3,572,600</b>	<b>\$ -</b>
Balance Remaining After Judicial Council Approvals			\$ 11,700	\$ 52,361
+ Balance Remaining Inclusive of "Presented" (for Ongoing net of Presented Fund Immediately)	\$ 700	\$ 52,361		

#### LEGEND

Highlighted items are currently being presented to the Budget and Fiscal Management Committee.

Highlighted items have been approved by the BFMC and are on track for being presented to the Judicial Council.

Highlighted items have been previously approved by the Judicial Council.

Highlighted items that are Fiscal Note Funds

\* - items have been presented and approved in prior years.

+ - One-time balance remaining is available to go into Judicial Council reserve. Ongoing balance remaining will be included in the beginning balance for ongoing turnover savings.

^ - Request to Legislature was Not Funded

BFMC approval to submit request to Judicial Council does not imply Judicial Council must approve the recommendation.

If more funds are available than the total of requests received, prioritization is optional.

# Item 2

## 14. FY 2026 Carryforward Spending Request – Annual All-Rise Outreach

The Judicial Branch receives budget funds annually through the Legislative appropriations process. Funds appropriated for FY 2025 are normally to be spent between July 1, 2024 and June 30, 2025; however, **the Legislature has approved the Judicial Branch to carry forward up to \$3.7M in unspent FY 2025 funds into FY 2026 (we will submit the lesser of \$3.7M or the actual amount of carryforward funds available).** This is a request to the Budget and Fiscal Management Committee/Judicial Council to allocate the use of some of these FY 2025 carryforward funds for one-time projects that will be delivered in FY 2026.

**Date:** 07/01/2025

**Department or District:** Office of Fairness and Accountability (OFA)

**Requested by:** Committee on Fairness and Accountability (CFA) represented by Jon Puente

**Request title:** All Rise Utah Welcome Dinner

**Amount requested:** One-time \$ 11,000 (last year's request was for \$10,000)

**Purpose of funding request:**

The All Rise Utah Project, a CFA subcommittee, requests funds to host the program's welcome dinner. This dinner introduces primarily first-year law students from all backgrounds to members of the bench and practicing lawyers in an effort to build their connections with the local legal community.

**This request is a back-up to efforts that are running in parallel with the Utah Bar to solicit donations from its members to cover the cost of the dinner. If approved, we would draw on these funds to the extent donations did not cover the entire cost. The dinner is scheduled for late September.**

**Executive summary (include background/history, expected outcomes, relation to performance measures and court mission). Attach supporting data or documents.**

Under [UCJA 3-419\(3\)\(A\)\(v\)](#), the OFA is tasked with

“collaborating with the Utah State Bar, schools, and other organizations to encourage individuals from marginalized communities to qualify and apply for judicial positions.”

To this end, the OFA and CFA created the All Rise Utah pipeline program. The primary goal of the program is set up to broaden the judiciary to more closely reflect the state. Relatedly, the program also aims to help students and young lawyers build connections with lawyers and judges in the state, which can positively influence their decisions to stay and practice law in Utah.

In furtherance of these goals, the judiciary, through the OFA and our partners who co-sponsor the All Rise Utah pipeline program, hosts a yearly dinner welcoming primarily first-year law students from the University of Utah and Brigham Young University. A significant number of the out-of-state students at the law schools come from communities that are underrepresented on the Bench. By helping these students build connections with Utah judges and lawyers and by encouraging them to stay in Utah after graduation, we can broaden the make-up of our legal community and the bench.

Having a bench that reflects the community is important because “lack of judicial diversity can create an appearance of unfairness.”<sup>i</sup> And by having a bench that reflects the community, we meet our mission to be fair and avoid the appearance of unfairness. A representative “bench is an essential component of a

## 14. FY 2026 Carryforward Spending Request – Annual All-Rise Outreach

fair and impartial judiciary. Bringing a range of experiences and perspectives to bear allows judges to make better informed decisions and increases public confidence in their rulings.”<sup>ii</sup> We cannot meet our mission without a representative bench. That is why the Judicial Council tasked the OFA to build a pipeline to help encourage individuals from all backgrounds to apply for judicial positions.

This dinner is the first step in the pipeline. At dinner, law students meet and engage judicial officers in a welcoming space. Judicial officers typically share with the law students their pathway to the bench and organic mentor relationships develop. The highlight of the dinner is Chief Justice Durrant welcoming the students into the state’s legal community and sharing the Judiciary’s commitment to these broadening efforts. The dinner is open to all law students.

The last three years we have held the dinner, it has been attended each year by over 90 law students and paid for by donations. In September 2024, close to 30 judicial officers also attended the dinner to welcome these students. Outside funding was raised totaling \$5,500 in 2023 and \$7,000 in 2024. In 2022, the dinner was held at the Utah Bar headquarters and food was covered by OFA and the Bar, as the event grew in attendance, we had to cover both venue and food costs.

### **Alternative funding sources, if any:**

As mentioned earlier, these funds are back-up funds to the efforts by the Utah Bar to cover the dinner costs through donations.

### **If this request is not funded at this time, what are the consequences or is there an alternative strategy?**

The annual dinner scope would be reduced and/or potentially delayed until adequate funding could be arranged.

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<sup>i</sup> Moffett and Gibson, “Diversity on the Bench” 2022,

[https://www.courtstatistics.org/\\_\\_data/assets/pdf\\_file/0029/86726/Diversity-on-the-Bench.pdf](https://www.courtstatistics.org/__data/assets/pdf_file/0029/86726/Diversity-on-the-Bench.pdf)

<sup>ii</sup> Brennan Center, “Diversity on the Bench” <https://www.brennancenter.org/issues/strengthen-our-courts/promote-fair-courts/diversity-bench#:~:text=Our%20Experts-Overview,public%20confidence%20in%20their%20rulings>.

# Item 3



# Administrative Office of the Courts

Chief Justice Matthew B. Durrant  
Utah Supreme Court  
Chair, Utah Judicial Council

July 2025

Ronald B. Gordon, Jr.  
State Court Administrator  
Neira Siaperas  
Deputy State Court Administrator

## MEMORANDUM

TO: The Budget & Fiscal Management Committee (BFMC)

FROM: Katy Burke, Treatment Court Coordinator  
Cris Seabury, Court Program Coordinator  
Shane Bahr, District Court Administrator  
Jordan Murray, Financial Manager

RE: Grant Application Proposal – Treatment Courts FY 2026 State Asset Forfeiture Grant (SAFG)

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We respectfully seek the Budget and Fiscal Management Committee's recommendation to advance the following grant application proposal (GAP) to the Judicial Council for final consideration. The FY 2026 SAFG application requests \$50,000 in funding from the Commission on Criminal and Juvenile Justice (CCJJ) to support travel and training costs associated with this year's treatment court conferences.

SAFG funding has historically provided \$25,000 annually for these purposes. This year, we are seeking an additional \$25,000 in one-time funding, bringing the total request to \$50,000.

This increase is requested due to a reported budget shortfall by the conference host, the Statewide Treatment Court Steering Committee (STCSC), citing rising per-diem rates and facility costs. The awarding agency, CCJJ, has encouraged submission of the expanded request to address this year's funding gap. The additional \$25,000 would allow the courts to maintain the planned conference programming (with additional conference speakers) and fund travel expenses for judicial officers and court staff.

Thank you.

The mission of the Utah judiciary is to provide the people an open, fair,  
efficient, and independent system for the advancement of justice under the law.

## I. Grant Applicant Information

Applicant Name:	Katy Burke		
Applicant Phone:	(385) 326-4896	Email:	katyb@utcourts.gov
Grant Administering Unit:	Third District / Treatment Courts		

## II. Grant Information

Awarding Agency:	Commission on Criminal & Juvenile Justice
Grant or Program Title:	State Asset Forfeiture Grant (SAFG)
Amount Requested:	\$50,000
Project Dates:	07/1/2025 – 06/30/2026

## III. Proposed Project & Use of Grant Funds

1. Please summarize the work you intend to fund with the grant. How will the grant project support the mission of the Utah State Courts “to provide the people an open, fair, efficient, and independent system for the advancement of justice under the law?” How will this grant provide measurable benefits to marginalized, minority, pro se, or similar underserved individuals or communities?

Treatment courts are one of the most effective programs in existence to address substance use and mental health disorders. Treatment courts are effective because of a collaborative team-based approach that is centered in the National Association of Drug Court Professionals' (NADCP) Best Practice Standards.

Individuals who are involved with the criminal justice system who live with substance use and mental health disorders are most likely to succeed when they participate in a treatment court where team members adhere to best practice standards. Utah State Courts in collaboration



with the Division of Substance Abuse and Mental Health (DSAMH) co-sponsor a treatment court training every other year for teams across the state. Team members include: judges, prosecutors, defense counsel, and treatment, probation, law enforcement and court staff. SAFG funds will be utilized to cover the training/travel expenses for judges and court staff. Local and national experts will be present to provide training to team members and team members will work on program improvement plans during and after the conference. Training is best delivered in a team setting where practitioners/team members can learn from each other and better understand the unique roles of each team member. SAFG funding will be used to help bring team members together to one location where they will benefit from the instruction of state and national experts. Funds provided by the SAFG are for one-time application and do not constitute an ongoing project for which incremental Court resources are required. The post-award phase will directly support the costs associated with travel and training expenses for the November 2025 Utah Treatment Court Conference.

All Rise provides training to over 7,000 treatment court professionals annually at its national conference – the largest training conference in the nation addressing substance abuse and crime. RISE26 is specifically tailored to enhance the skills, leadership, and training of the treatment court team with over 250 sessions, opportunities to connect and learn from colleagues around the world. RISE26 offers courses for the new practitioner and team members who have been in the field for years. The sessions will be a blend of providing what to watch for now and in the future and practical ways to address these concerns at a reasonable cost. Further, it will help us focus our attention on the highest risk areas, given how stretched our resources are. Plenary presentations and breakout sessions will include topics for all types of treatment courts. If funded, this grant will permit approximately eight judges (estimated cost of attendance per staff member is \$2,774) to attend and bring the information back to share with their team and colleagues. RISE26 offers a world-class education that is unparalleled in our field.

2. Please provide details on the judicial and/or administrative resources required for this project during the grant period, including whether you intend to use the grant funding to hire new employees. If hiring a new employee with grant funding, explain their intended duties, anticipated effort (hours per week), and whether the position will be temporary or permanent.

Funds provided by this grant are for one-time application and do not constitute an ongoing project for which incremental resources are required. The grant will directly support the costs associated with travel and training expenses for the Utah Treatment Court Conference and Rise26 National Conference. No employees will be hired with this grant funding, nor will funds supplant any portion of salaries or benefits for existing employees.

3. Will additional funding be required to maintain this project or its related outcomes once the grant funding has been fully expended? If yes, what funding sources will be used or sought?

This grant supports participation at the Statewide Treatment Court Conference and Rise26 National Conference. No additional state funding is required to support ongoing programs nor infrastructure. However, this year the Statewide Treatment Court Steering Committee (STCSC) has reported the budget to host the November 2025 State Treatment Court Conference is in a deficit due to the increase in per-diems and facility costs. The STCSC recommended we contact CCJJ and request a grant award increase for FY26 by \$25,000. Historically, CCJJ has provided \$25,000 annually to support this effort, and has encouraged us to request the additional funds, bringing this year's revised amount to \$50,000. The additional funding will be used to fund additional speakers for the Statewide Treatment Court Conference as well as travel expenses for court staff to attend the Rise26 National Conference. If STCSC continues to report a deficit and CCJJ is unable to award an increase in the grant award, alternative funding sources include funding from the District Court and Juvenile Court budgets.

4. What are the consequences if this project is not funded?

If the project is not funded, the full 8 treatment court judges and staff who have historically attended will be unable to receive the most current training on the updated national treatment court standards or attend the National Treatment Court Conference. The Utah Treatment Court Conference provides a valuable opportunity for all treatment court professionals across the state to convene and collaborate within their multidisciplinary teams. Without access to up-to-date training, teams may struggle to meet certification requirements, and the overall quality of services provided to treatment court participants could be negatively impacted.

#### IV. Anticipated Budget

Complete the budget table with estimated expenditures for up to three state fiscal years.

This grant requires a cash-match (complete the table below).

This grant requires in-kind contributions (complete the table below).

This grant requires neither cash nor in-kind contributions (complete *blue* columns only).

State Fiscal Year	Estimated Grant Expenditures	Cash Match or In-kind Contributions (source & amount)				
		General Fund	Dedicated Credits <sup>1</sup>	Restricted Account <sup>2</sup>	Maintenance of Effort	Total Cash or In-kind
2026	\$50,000	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
2027	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
2028	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00

Please provide details about the source of matching funds or in-kind contributions, if any. If there are no matching or in-kind funds, please write "none."

None.

<sup>1</sup> Utah Code Section 63J-1-102, "dedicated credits" refer to collections by an agency that fund agency operations. This includes assessments and sales of goods and services.

<sup>2</sup> Utah Code Section 63N-3-102, "restricted account" is a specific account within the General Fund designated for particular purposes, such as the Industrial Assistance Account.

## V. Resource Impact Assessment

The resource impact assessment is completed by the **grant coordinator** using information provided by the grant applicant and other project stakeholders.

### Section 1. Authorization Process (Executive & Legislative Branches)

When federal or non-federal grants received by the Judicial Branch change after the Federal Funds Request Summary (FFRS) has been approved by the legislature during the regular session in March, the changes may require approval depending on certain criteria. Some changes may have a higher impact on the state's budget than others. This is referred to as the "Impact Level." The impact level determines what level of approval is required before the Judicial Branch may spend any additional funds beyond what was authorized in the annual FFRS.

*If awarded, this grant will be authorized through the FFRS in the regular legislative session; no additional reporting to the Executive Appropriations Committee (EAC) is required.*

*If awarded, this grant will fall outside of the legislative session. Authorization to spend funds will be obtained through the interim process where the following impact levels determine the degree of authorization required before funds may be spent:*

#### **Tier 1 – Low**

**Non-Federal.** At least \$10k but no more than \$50k per year, and no new permanent full or part time employees; and no new state monies required as match (report GAP with Judicial Council approval to LFA and EAC only).

**Federal.** Up to \$1M per year; and no new permanent full or part time employees; and no new state monies required for match (report GAP approved by Judicial Council to LFA, Office of Legislative Research & General Counsel, and EAC).

#### **Tier 2 – Medium**

**Non-Federal.** Greater than \$50k but less than \$1M per year; or adds more than zero but less than 11 permanent full or part time employees; or requires state to expend up to \$1M per year in new state monies as match (submit GAP with Judicial Council approval to EAC for review and recommendations).

**Federal.** Greater than \$1M but less than \$10M per year; adds more than zero but less than 11 permanent full or part time employees; or requires state to expend up to \$1M per year in new state monies as match (submit GAP approved by the Judicial Council to the federal funds request summary to EAC for review & recommendations).

#### **Tier 3 – High**

**Non-Federal.** Greater than \$1M per year; or adds more than 11 permanent full or part time employees; or requires state to expend greater than \$1M per year in new state monies as match (submit GAP with Judicial Council approval to the Legislature for review to approve or reject the grant).

**Federal.** Greater than \$10M per year; or adds more than 11 permanent full or part time employees; or requires state to expend greater than \$1M per year in new state monies for match (submit GAP approved by the Judicial Council to the federal funds request summary to Legislature for approval or rejection in an annual general session or special session).

## Section 2. Resource Impact Assessment

Assess the capacity of impacted court areas to successfully support the grant at current staffing levels.<sup>3</sup>

The treatment courts have sufficient capacity to support this grant at current staffing levels. If awarded, the intended use of funding will not require additional staff nor administrative resources, as it funds travel and training expenses for existing personnel to attend the Utah Treatment Court Conference and Rise26 National Conference. These professional development activities do not impose additional resource demands.

Assess the anticipated incremental impacts to AOC resources once grant funds are expended.<sup>4</sup>

No incremental impacts to AOC resources are anticipated if the full \$50,000 grant is awarded by CCJJ, as all expenses related to travel and training will be fully covered by the award. If the supplemental \$25,000 is not approved, there may be either fewer attendees or limited funding sought from the District Court and Juvenile Court budgets to address the shortfall resulting from STCSC's current deficit.

This grant application proposal has been reviewed by:

*Court level executive and/or applicable board of judges,  
Grant Coordinator and Finance Director,  
The Utah Supreme Court (UCJA Rule 3-105);*

and approved by the Judicial Council on Date

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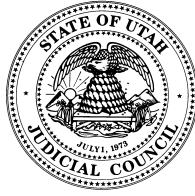
State Court Administrator  
Administrative Office of the Courts

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<sup>3</sup> UCJA Rule 3-411 (4)(a)(i)

<sup>4</sup> UCJA Rule 3-411 (4)(a)(ii)

Tab 4



# Administrative Office of the Courts

**Chief Justice Matthew B. Durrant**  
Utah Supreme Court  
Chair, Utah Judicial Council

**Ronald B. Gordon, Jr.**  
State Court Administrator  
**Neira Siaperas**  
Deputy Court Administrator

## MEMORANDUM

TO: Judicial Council

FROM: Jim Peters, Justice Court Administrator

DATE: July 14, 2025

RE: Request to Certify Jeffrey Shea Owens as a New Justice Court Judge

---

Section 78A-7-202(5) of the Utah Code authorizes the Judicial Council to certify new justice court judges once they have been selected by a city or county and completed an orientation seminar. With the retirement of Judge Gary Johnson on June 30, 2025, Kane County has selected Jeffrey Shea Owens to serve as its new judge. Mr. Owens has completed the online modules that now constitute the orientation seminar and has passed the exam administered by the Education Department. As such, I am requesting that Mr. Owens be certified as a new justice court judge effective July 21, 2025. Thank you for your consideration.

**The mission of the Utah judiciary is to provide an open, fair,  
efficient, and independent system for the advancement of justice under the law.**

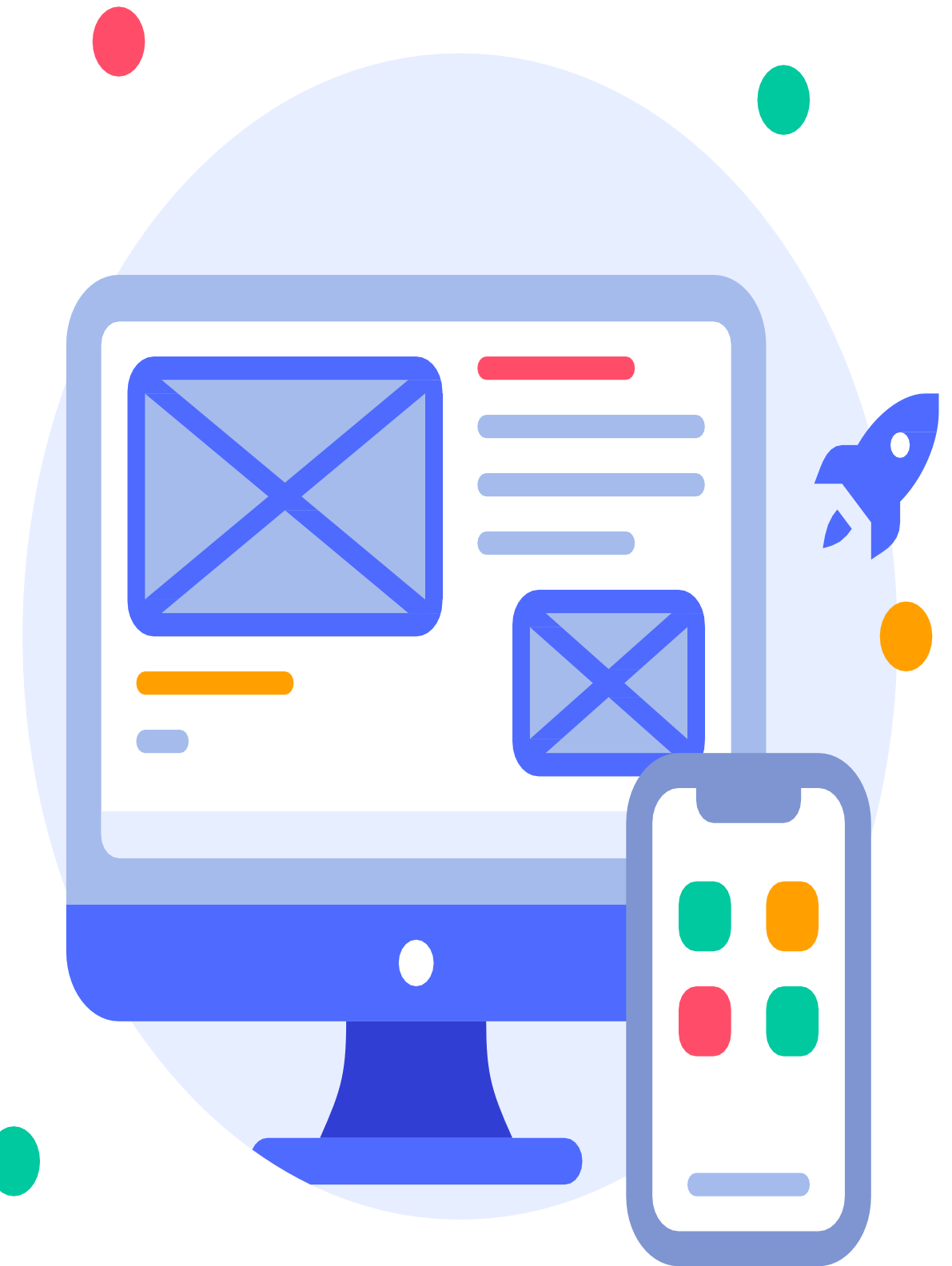
Tab 5



# WELCOME

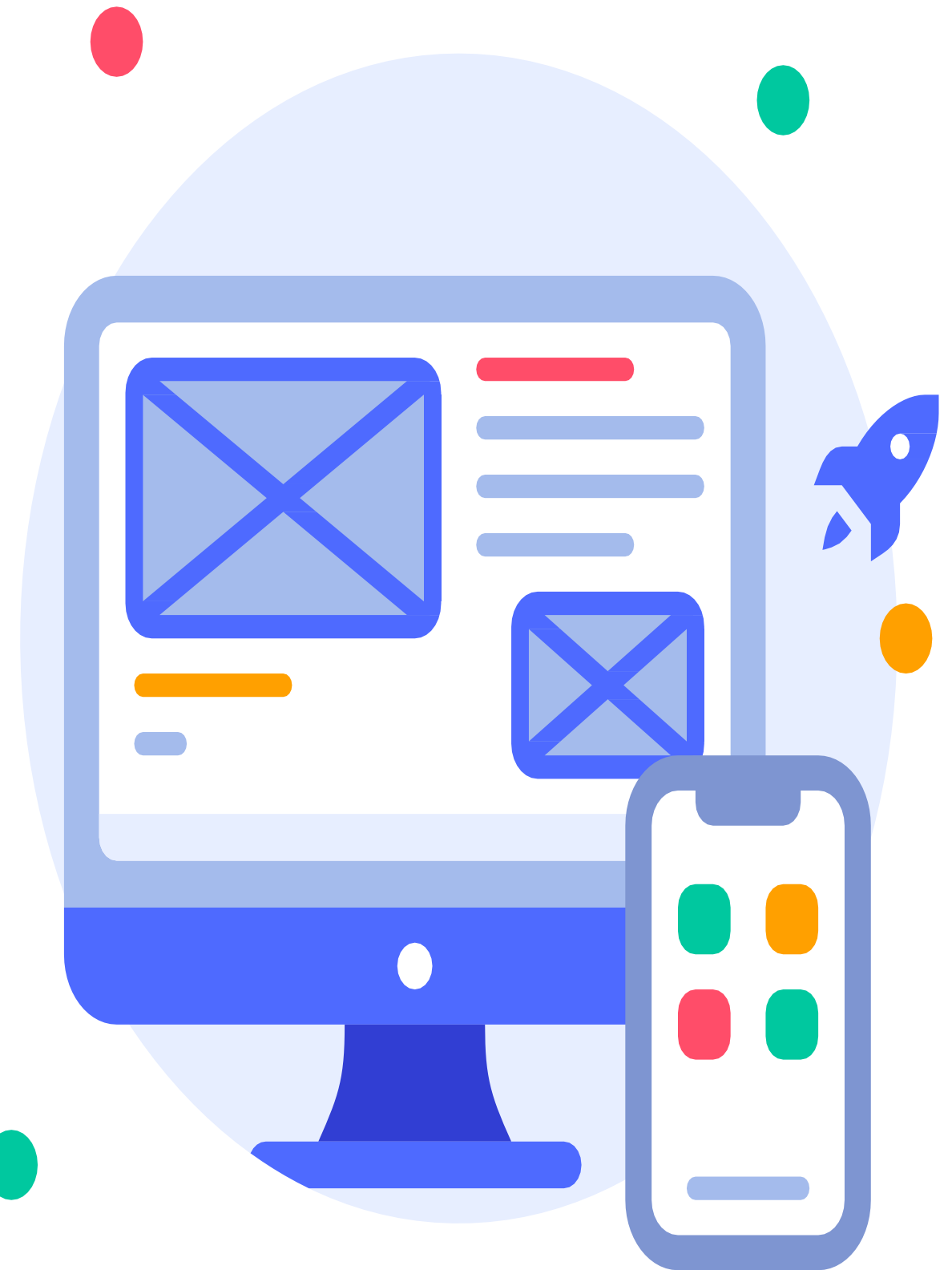
TO THE JUDGE PORTAL

*This is a portal to test a new and improved way to distribute judge evaluation reports. The goal of this transition is to make a user-friendly, efficient, and robust distribution process.*



# FEATURES


- All historic reports in one location
- The ability to see all comments from the individual respondent
- Additional resources and information about JPEC and the evaluation process







# WEBPAGEPAGE

J U D G E R E S O U R C E P A G E

- *Full Copies of Surveys used by JPEC*
  - *Blind Review Process*
    - *Deliberation Process*
  - *Evaluation Timeline*
  - *Newly Appointed Judge Timeline*
  - *Class Year Calculator*
  - *Current Pilot Projects (to improve the evaluation process and increase survey respondent numbers)*
- 




UNDER  
CONSTRUCTION











# WEBPAGEPAGE

J U D G E F A Q P A G E

- *How JPEC Writes Narratives*
  - *How are Observers Trained?*
  - *Surveys*
    - *Who gets a Survey?*
    - *Who make up my Survey "Peers"?*
    - *Bias*
    - *"Targeted Attacks"*
  - *How does the Commission Handle Negative Comments?*
  - *Can I Change my Biography?*
  - *How to Address Concerns about my Report*
- 



UNDER  
CONSTRUCTION



**QUESTIONS,  
CONCERNS,  
REQUESTS?**

Tab 6



# 2025 IDC Report to Judicial Council

Subtitle

# Highlights

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Indigent Appellate Defense Division

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Grant Program

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Attorney Training Program

---

Parental Defense Social Workers

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Juvenile Delinquency

---

Aggravated Murder Fund

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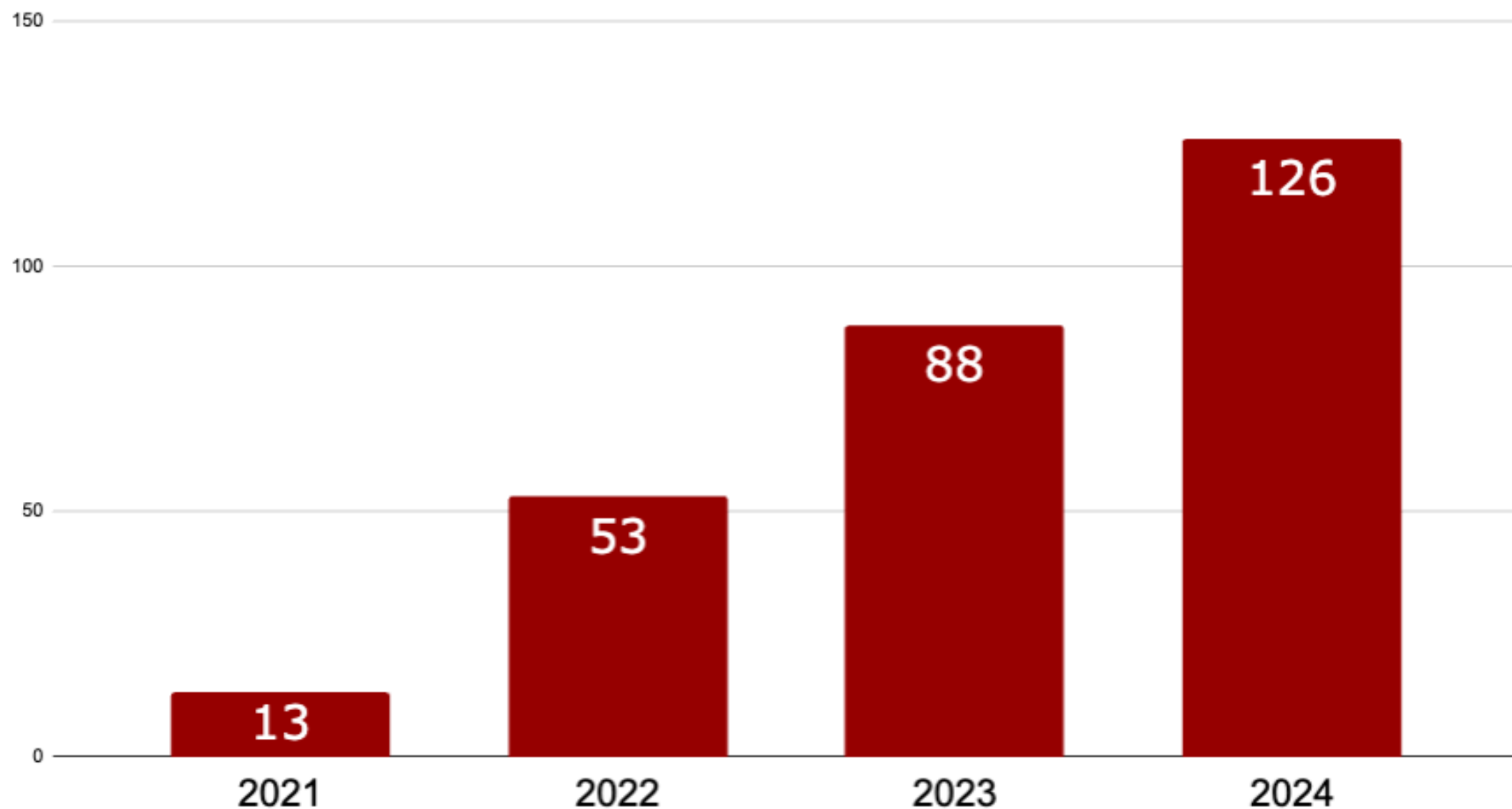


## Indigent Appellate Defense Division

- Chief Appellate Officer
- Deputy
- Adult Criminal Appeals – 4 Attorneys
- Child Welfare Appeals – 2.5 Attorneys
- Post Conviction – 1 Attorney

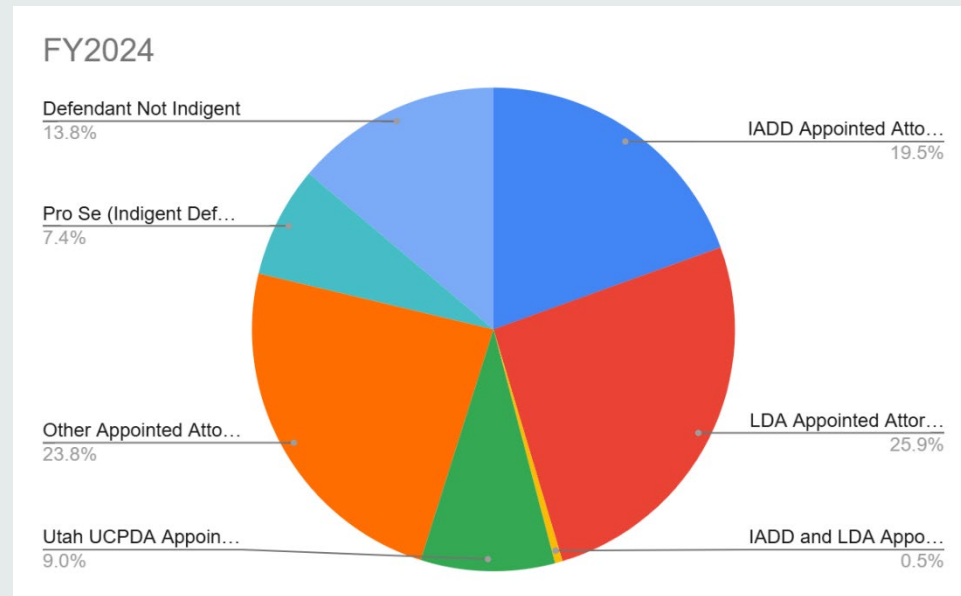


# Total cases handled by IADD (all sections) by year

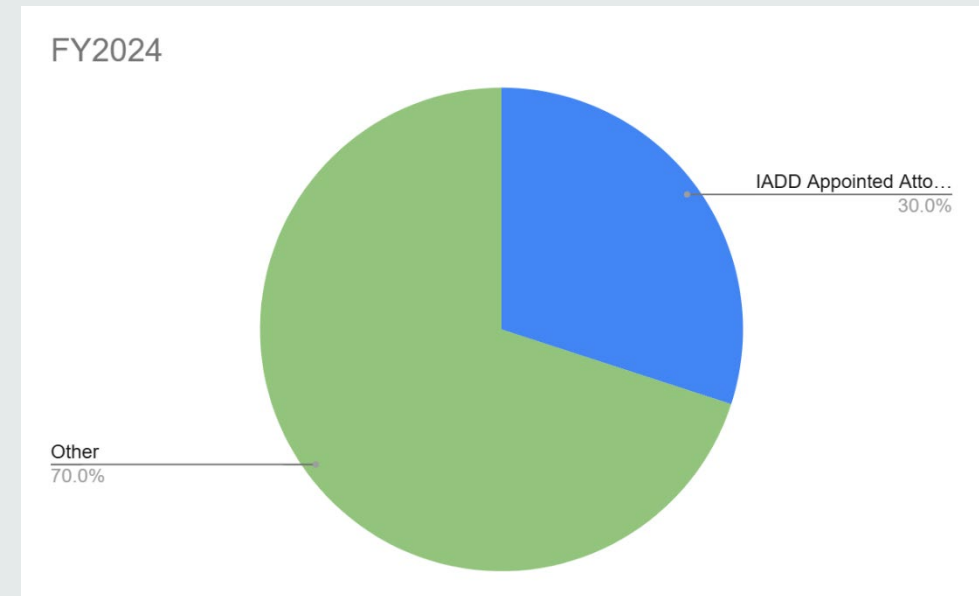


# Adult Criminal Appeals

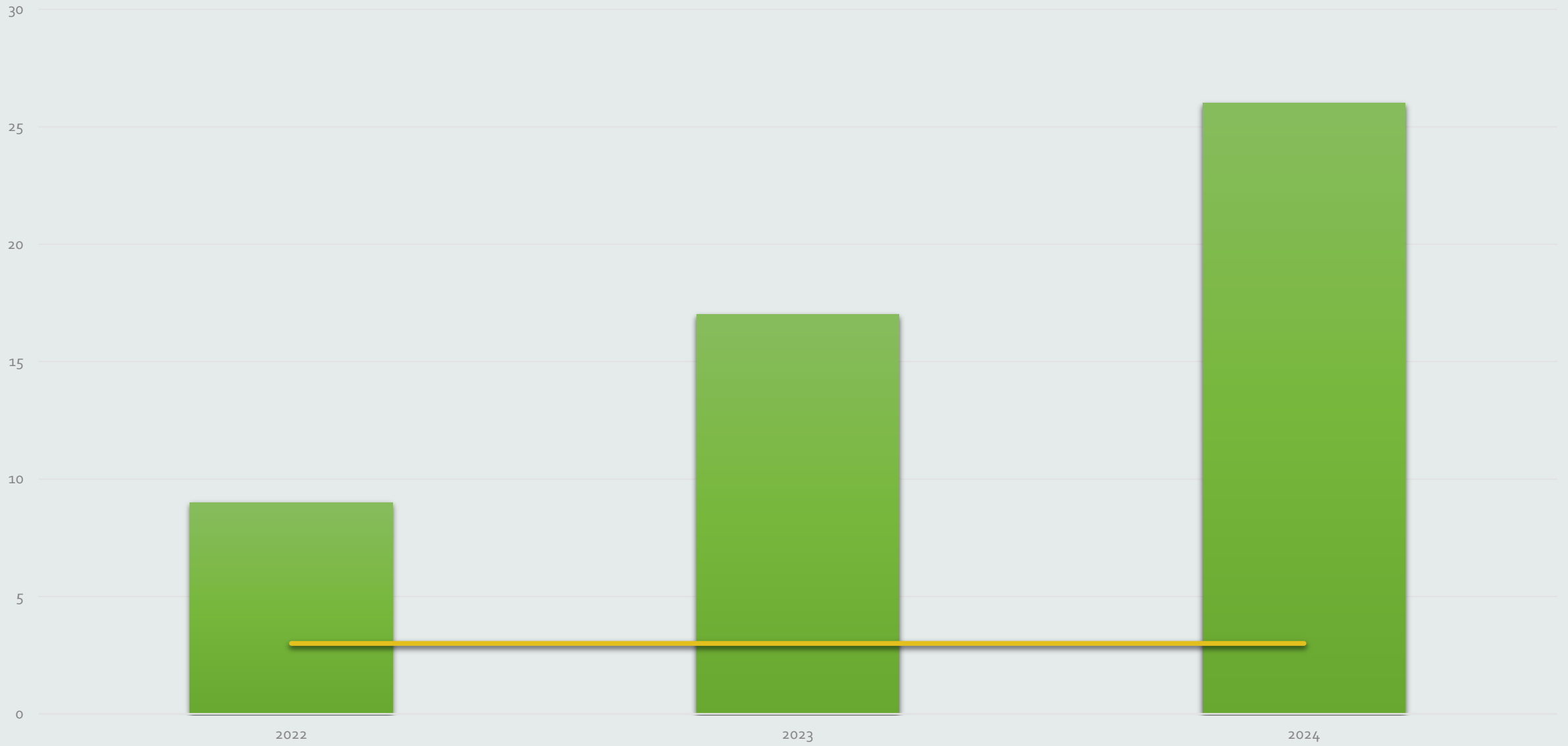
## Appeals Filed



## Rulings for Defense



## Post Conviction Cases

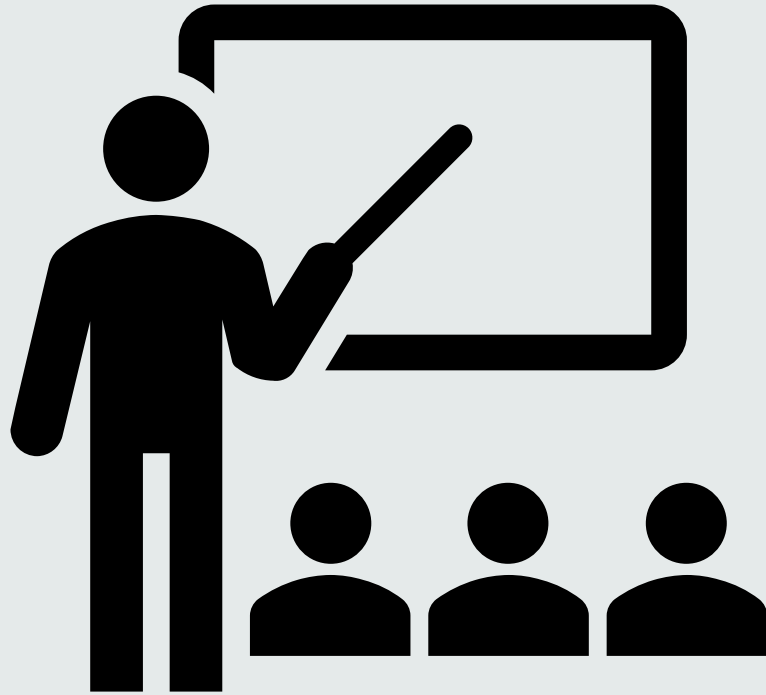


# Grant Program

- 24 Counties Receive Grant Funding – 97% of District Court Cases
- \$7,386,000 Distributed
- Defense Resources
- Travel Reimbursement



# Attorney Training Program



- Full-time Trainer
- Doubled the number of online CLE's
- Increased Specialization – Adult Criminal, Child Welfare, and Delinquency trainings

# Child Welfare Interdisciplinary Parent Representation Program



IPR pilot initiated by the  
Legislature in FY23



Originally \$170,000, supplemented with other IDC  
grant funding



4 social workers

Box Elder/Cache  
Davis  
Iron/Beaver/Kane  
Weber

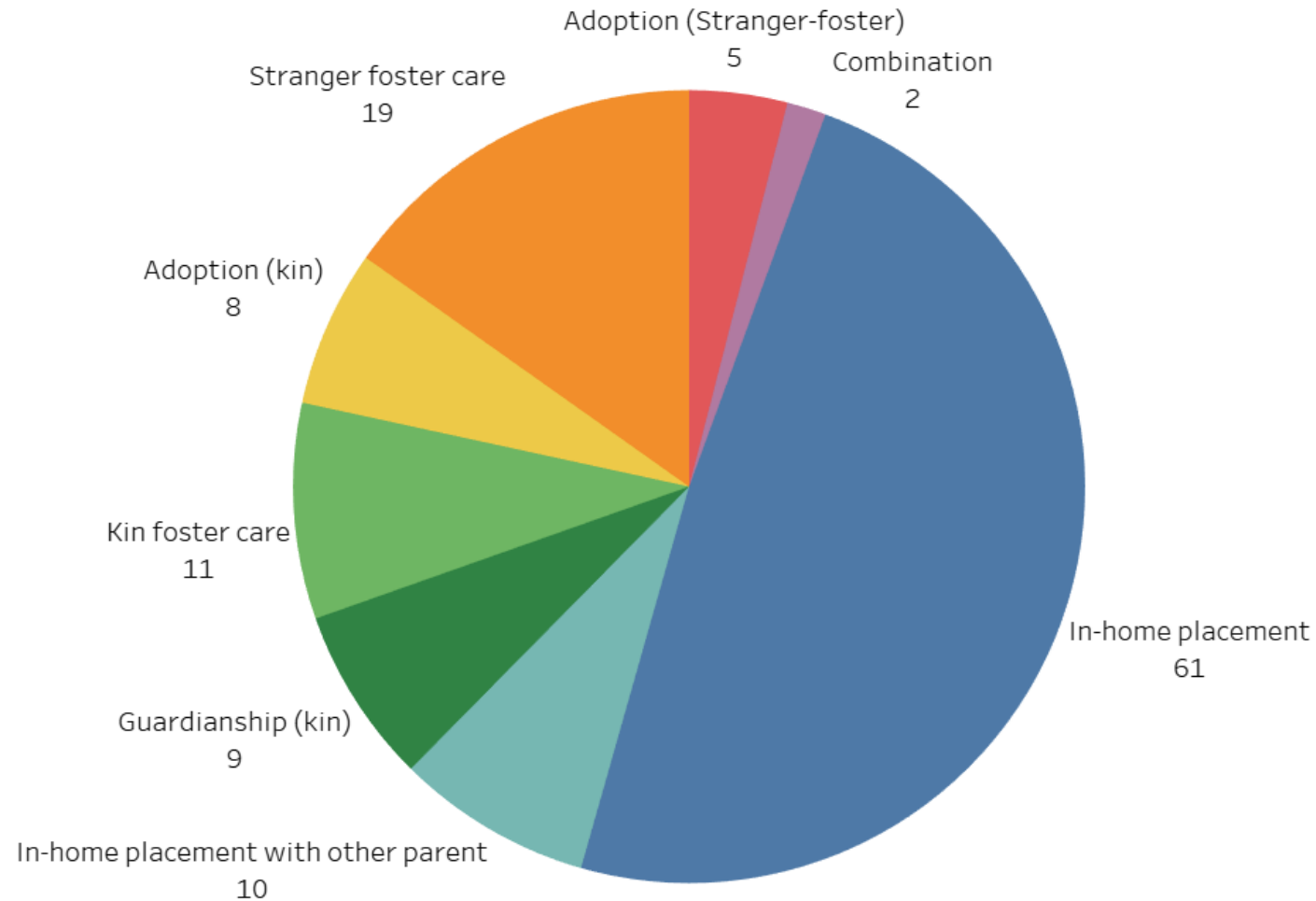


Social workers are employed as part of the legal  
team



IPR teams are supervised by the managing  
defender attorney in each county and region

# Placement Status at Permanency Hearing



125 cases

57% reunification rate

plus 22% placed with kin



# Juvenile Delinquency

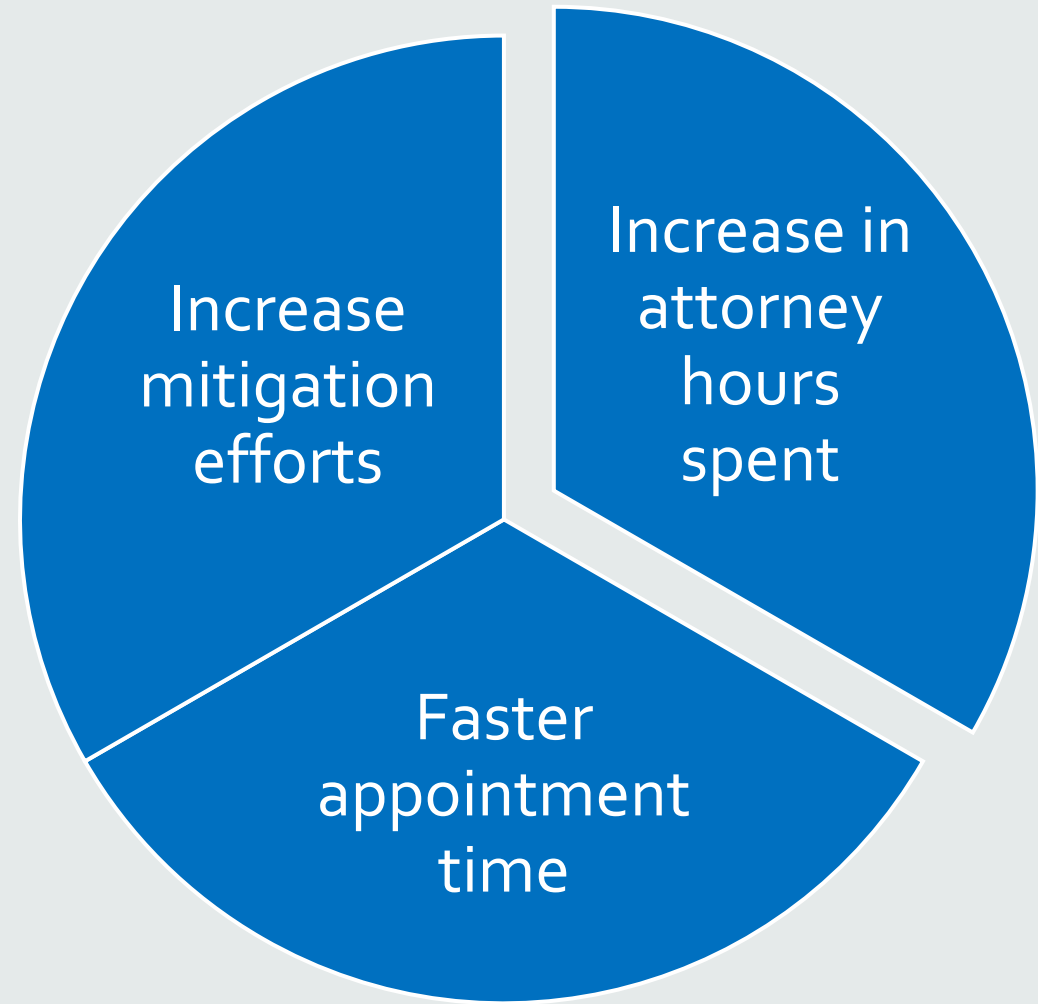


NON-JUDICIAL  
ADJUSTMENT COUNSEL



JUVENILE DEFENSE FUND

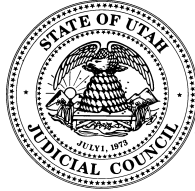
# Aggravated Murder Fund





Contact:  
Matthew Barraza,  
Executive Director  
[mbarraza@utah.gov](mailto:mbarraza@utah.gov)

Tab 7



# Administrative Office of the Courts

Chief Justice Matthew B. Durrant  
Utah Supreme Court  
Chair, Utah Judicial Council

July 11, 2025

Ronald B. Gordon, Jr.  
State Court Administrator  
Neira Siaperas  
Deputy State Court Administrator

## MEMORANDUM

**TO: Management Committee / Judicial Council**  
**FROM: Keisa Williams**  
**RE: Rules for Final Approval**

---

Proposed amendments to CJA rules 3-117 and 3-403 are back from a 45-day public comment period. No public comments were received.

### **CJA 3-117. Committee on Court Forms (AMEND)**

The amendments: 1) formalize the authority of the Forms Committee; 2) clarify that the Judicial Council must approve forms used by Licensed Paralegal Practitioners; 3) grant the Forms Committee the authority to approve all other forms; 4) allow the Forms Committee to delegate its responsibility for certain groups of forms; and 5) direct the Forms Committee to draft forms that center on the needs of self-represented litigants and enhance access to justice.

### **CJA 3-403. Judicial branch education (AMEND)**

The amendments make the rule applicable to all state employees who are not time-limited and modify program requirements to align with the judiciary's performance year.

The Policy, Planning, and Technology Committee recommends that the rules above be adopted as final with a *November 1, 2025 effective date*.

### **CJA 3-116. Pretrial Release and Supervision Committee (REPEAL)**

The standing committee on pretrial release and supervision was dissolved and removed from CJA Rule 1-205 in November 2024, but the associate committee rule was not repealed.

The Policy, Planning, and Technology Committee recommends that Rule 3-116 be repealed, with a *July 21, 2025 effective date*.

The mission of the Utah judiciary is to provide an open, fair,  
efficient, and independent system for the advancement of justice under the law.

**Rule 3-117. Committee on Court Forms****Intent:**

To establish a committee to determine the need for forms and to create forms for use by litigants in all court levels.

**Applicability:**

This rule ~~shall apply~~ applies to the judiciary.

**Statement of the Rule:**

(1) **Scope of Committee Work.** The committee ~~shall~~ will have exclusive responsibility within the judiciary over all forms that require written input or are commonplace and require action from litigants. Pretrial orders, checklists, and documents generated by decision-makers that do not require written input from litigants are beyond the scope of the committee. The committee may also draft legal forms that do not contemplate litigation yet expand access to justice. The committee may delegate its responsibility for certain groups of forms as it deems appropriate. ~~review current court forms and assess the need for new court forms to assist parties and practitioners in all court levels.~~

(2) **Current and new forms.** The committee ~~shall create forms as it deems necessary for use by parties and practitioners, including forms for the Online Court Assistance Program.~~ will review current forms, assess the need for new court forms, and create and revise forms as it deems necessary for use by parties and practitioners at all court levels, including forms for the court document assembly program. The committee will also adopt procedures for the recommendation of translation of forms into other languages.

(3) **Approval and use of forms.** Unless directed otherwise, the Council delegates final approval authority to the committee for all forms, except those used by LPPs. Objections to approved forms may be raised with the Council by the committee or Boards. Courts must accept committee-approved forms, unless a judge or commissioner makes a determination that the form is not legally sufficient.

~~(5) Process for form creation.~~ **Format and content.** Forms should be:

~~(3)(a) The committee shall adopt procedures for creating new forms or making substantive amendments to existing forms, procedures for eliminating obsolete and outdated forms, procedures for recommending which forms should be translated into other languages, and procedures for expediting technical or non-substantive amendments to forms.~~

~~(3)(b) Forms should be:~~

~~(35)(A)(i)~~ written in plain language and reference the statutes and rules to which the forms apply; drafted to center the needs of self-represented litigants and promote and expand access to justice;

~~(35)(B)(ii)~~ reviewed for legal correctness; written in plain language;

~~(35)(Cb)(iii) standardized across the state where practicable;~~ grounded in legal authority,  
reviewed for legal correctness, and reference applicable statutes and rules;

~~(35)(Db)(iv) developed to promote and expand access to justice;~~ standardized across  
the state where practicable;

~~(35)(Eb)(v)~~ structured to eliminate redundancy and unnecessary steps; and

~~(35)(Eb)(vi)~~ user-tested when practicable.

~~(3)(c) The committee shall solicit input from other interested groups as it deems appropriate.  
The committee may establish subcommittees using non-committee members to facilitate its  
work.~~

~~(3)(d) The committee may recommend to the Judicial Council mandatory use of particular forms.  
However, the Judicial Council's designation of a form as mandatory is not binding on a decision-  
maker asked to review the legal correctness of the form.~~

~~(46)~~ Organizing forms. The State Law Librarian will be responsible for maintaining and  
~~archiving~~ organizing the forms.

*Effective: ~~November 1, 2023~~ November 1, 2025*

**Rule 3-403. Judicial branch education.****Intent:**

To establish the Judicial Branch Education Committee's ("Committee") responsibility to develop and evaluate a comprehensive education program for all judicial officers and court staff.

To establish education standards for judicial officers and court staff, including provisions for funding and accreditation for educational programs.

To ensure that education programs, including opportunities for job orientation, skill and knowledge acquisition, and professional and personal development, are available to all members of the judicial branch and that such programs utilize the principles of adult education and focus on participative learning.

To emphasize the importance of participation by all judicial branch employees in education and training as an essential component in maintaining the quality of justice in the Utah courts.

**Applicability:**

This rule ~~shall apply~~applies to all judicial officers and court staff, except ~~seasonal employees and law clerks~~employees classified as time-limited pursuant to human resource policies.

**Statement of the Rule:****(1) Organization.**

(1)(A) **Judicial branch education committee.** The Committee ~~shall~~will submit to the Council for approval proposed policies, standards, guidelines, and procedures applicable to all judicial branch education activities. It ~~shall~~will evaluate and monitor the quality of educational programs and make changes where appropriate within the approved guidelines for funding, attendance, and accreditation.

(1)(B) **Responsibilities of members.** Committee members ~~shall~~will propose policies and procedures for developing, implementing, and evaluating orientation, continuing skill development, and career enhancement education opportunities for all judicial branch employees; formulate an annual education plan and calendar consistent with the judicial branch education budget; and serve as advocates for judicial branch education, including educating the judiciary about the purpose and functions of the Committee.

**(1)(C) Committee meetings.**

(1)(C)(i) The Committee ~~shall~~will meet twice a year. Additional meetings may be called as necessary. A majority of voting members in attendance is required for official Committee action.

(1)(C)(ii) The chairperson may recommend to the Council that a Committee member be replaced if that member is absent without excuse from two consecutive Committee meetings or fails to meet the responsibilities of membership as outlined in paragraph (1)(B).

**(2) Administration.**



**Judicial Education Officer.** The Judicial Education Officer, under the direction of the Court Administrator, ~~shall~~will serve as staff to the Committee and be responsible for the administration of the judicial education program consistent with this rule.

**(3) Education standards for judicial officers.**

**(3)(A) Requirements for judicial officers (judges, court commissioners, active senior judges and active senior justice court judges).**

(3)(A)(i) All new judicial officers ~~shall~~will participate in the first designated orientation program offered after the date the judge is administered the oath of office, unless attendance is excused for good cause by the Management Committee.

All judicial officers ~~shall~~will complete 30 hours of pre-approved education each fiscal year, to be implemented on a schedule coordinated by the Committee. To satisfy annual program requirements judicial officers will complete training on harassment and abusive conduct prevention; ethics; inclusion and elimination of bias.

Judicial officers may attend a combination of approved local, state, or national programs. Active and inactive senior judges and retired judges may attend approved local or state programs and the annual judicial conference, but an inactive senior judge or retired judge must pay all expenses.

(3)(A)(ii) **Inactive senior judges and retired judges.** If an inactive senior judge or a retired judge applies to be an active senior judge, the judge ~~shall~~will demonstrate that:

(3)(A)(ii)(a) he or she has attended 30 hours of approved judicial education within one year before the application; or

(3)(A)(ii)(b) he or she has attended the new judge orientation for judges of the courts of record within one year before the application.

(3)(B) **Program components.** Education programs for judicial officers ~~shall~~will include: a mandatory new judge orientation program; a variety of programs addressing substantive and procedural law topics, aimed at skill and knowledge acquisition; and programs geared to professional and personal development, to meet the continuing needs of judicial officers.

(3)(C) **Annual conferences.** Justice court judges and active senior justice court judges ~~shall~~will attend the annual justice court conference unless excused by the Board of Justice Court Judges for good cause. Because the annual judicial conference represents the only opportunity for judges to meet and interact as a group and to elect their representatives, judicial officers are strongly encouraged to attend that conference.

**(4) Standards for court staff.**

**(4)(A) State employees.**

(4)(A)(i) **Program requirements.** All court staff employed by the state ~~shall~~will complete 20 hours of approved coursework ~~annually~~during the performance year, as defined by human resource policies. To satisfy ~~annual~~program performance year requirements state employees must complete training on harassment and abusive conduct prevention; ethics; inclusion and elimination of bias.

(4)(A)(ii) **Program components.** Education programs for court staff employed by the state ~~shall~~will include: onboarding for new employees as well as new employee orientation; skill development programs that teach technical and job-related competencies; and enhancement programs that promote personal and professional growth within the organization.

**(4)(B) Local government employees.**

(4)(B)(i) **Program requirements.** All court staff employed by the justice courts ~~shall~~will complete 10 hours of approved coursework annually.

(4)(B)(ii) **Program components.** Education programs for court staff employed by local government ~~shall~~will include: annual training seminar; skill development programs that teach technical and job-related competencies; and enhancement programs that promote personal and professional growth. Professional and personal development programs may include training on harassment and abusive conduct prevention; ethics; inclusion and elimination of bias.

**(5) Reporting.**

(5)(A) Judicial officers and court staff governed by these standards ~~shall~~will report participation in education programs on a form developed by the Committee.

(5)(B) For court staff, compliance with judicial branch education standards ~~shall~~will be a performance criterion in the evaluation of all staff.

(5)(B)(i) Supervisory personnel are responsible to ensure that all staff have an opportunity to participate in the required education. Failure of a supervisor to meet the minimum education standards or to provide staff with the opportunity to meet minimum education standards will result in an unsatisfactory performance evaluation in the education criterion.

(5)(B)(ii) Failure of staff to meet the minimum education requirements will result in an unsatisfactory evaluation on the education criterion unless the employee provides documented reasons that the employee's failure to meet the education standards is due to reasons beyond the employee's control.

**(6) Credit.** Judicial education procedures ~~shall~~will include guidelines for determining which programs qualify as approved education within the meaning of these standards.

**(7) Funding.**

(7)(A) **Budget.** In preparing its annual request for legislative appropriations, the Council ~~shall~~will receive and consider recommendations from the Committee. The Committee's

annual education plan ~~shall~~will be based upon the Council's actual budget allocation for judicial education.

(7)(B) **In-state education programs.** Judicial branch funds allocated to in-state judicial education ~~shall~~will first be used to support mandatory in-state orientation programs for all judicial branch employees and then for other education priorities as established by the Committee with input from the Boards of Judges and Administrative Office.

(7)(C) **Out-of-state education programs.** To provide for diverse educational development, to take advantage of unique national opportunities, and to utilize education programs which cannot be offered in-state, the annual education plan ~~shall~~will include out-of-state education opportunities. The Committee ~~shall~~will approve national education providers and ~~shall~~will include in the education procedures, criteria to be applied by the Administrative Office to out-of-state education requests. Criteria ~~shall~~will include relevance to the attendee's current assignment and attendance at in-state programs. Disagreement with a decision to deny an out-of-state education request may be reviewed by a quorum of the Committee at the applicant's request.

(7)(D) **Tuition, fees, and travel.** The Committee ~~shall~~will develop policies and procedures for paying tuition, fees, per diem, and travel for approved programs. State funds cannot be used to pay for discretionary social activities, recreation, or spouse participation. The Committee may set financial limits on reimbursement for attendance at elective programs, with the individual participant personally making up the difference in cost when the cost exceeds program guidelines.

**(8) Mentoring.**

(8)(A) Within seven business days after a new district or juvenile judge has been sworn in, the Presiding Judge ~~shall~~will appoint a mentor to the new judge.

(8)(B) Within fourteen business days after a new district or juvenile judge has been sworn in, the mentor and the new judge ~~shall~~will meet and review the Judicial Mentoring Guidelines and Best Practices Recommendations, complete the Mentors' Checklist contained therein and the mentor, within that same fourteen business day period, ~~shall~~will provide the completed Mentor's Checklist to the Judicial Education Officer.

*Effective: ~~5/30/2024~~November 1, 2025*

**~~Rule 3-116. Pretrial Release and Supervision Committee.~~**

**~~Intent:~~**

~~To study and make recommendations to the Judicial Council concerning pretrial release and supervision practices.~~

**~~Applicability:~~**

~~This rule shall apply to the judiciary.~~

**~~Statement of the Rule:~~**

~~The committee shall study pretrial release and supervision practices, and make regular reports and recommendations concerning those practices to the Judicial Council.~~

~~(1) Duties of the committee. The committee shall:~~

~~(1)(A) work to implement the recommendations of the Report to the Utah Judicial Council on Pretrial Release and Supervision Practices;~~

~~(1)(B) study and make recommendations regarding pretrial release and supervision generally, including the following:~~

~~(1)(B)(i) studying current pretrial release and supervision practices, the efficacy of such practices, and making recommendations for changes to those practices as necessary;~~

~~(1)(B)(ii) developing and recommending written guidelines to the Judicial Council to be used for setting financial and non-financial conditions of pretrial release;~~

~~(1)(B)(iii) assisting and advising counties on implementing a statewide pretrial risk assessment tool and developing procedures for distributing the assessment results to judges;~~

~~(1)(B)(iv) assisting and advising counties to develop pretrial supervision programs;~~

~~(1)(B)(v) determining what pretrial release and supervision data are necessary to accurately assess pretrial release and supervision practices, and making recommendations on how pretrial release and supervision data collection practices can be improved including which organizations should collect the data and how it should be collected;~~

~~(1)(B)(vi) recommending training for judges, lawyers, and other stakeholders on pretrial release and supervision practices;~~

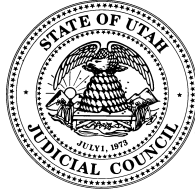
~~(1)(B)(vii) recommending, if necessary, appropriate statutory and rule changes; and~~

~~(1)(B)(viii) providing ongoing monitoring and assessment of Utah's pretrial release and supervision practices; and~~

~~(1)(C) on an annual basis, the committee shall report its progress to the Judicial Council.~~

**~~Effective: 12/14/2015~~**

Tab 8



# Administrative Office of the Courts

Chief Justice Matthew B. Durrant  
Utah Supreme Court  
Chair, Utah Judicial Council

July 11, 2025

Ronald B. Gordon, Jr.  
State Court Administrator  
Neira Siaperas  
Deputy State Court Administrator

## MEMORANDUM

**TO: Management Committee / Judicial Council**  
**FROM: Keisa Williams**  
**RE: Rules for Public Comment**

---

The Policy, Planning and Technology Committee (PP&T) recommends that CJA rule 3-407 be approved for a 45-day public comment period.

### **CJA 3-407. Accounting (AMEND)**

The Board of Justice Court Judges voted to adopt the Court's Accounting Manual as the standard for all justice courts. The proposed amendments: 1) broaden the scope of the manual to include justice courts; 2) add two members of the Justice Court Education Committee to the Accounting Manual Review Committee; and 3) make non-substantive formatting changes.

The mission of the Utah judiciary is to provide an open, fair,  
efficient, and independent system for the advancement of justice under the law.

**Rule 3-407. Accounting.****Intent:**

To establish uniform procedures for the processing, tracking, and reporting of accounts receivable and trust accounts.

**Applicability:**

This rule applies to the judiciary.

**Statement of the Rule:****(1) Manual of procedures.**

(1)(A) **Manual of procedures.** The ~~a~~Aadministrative ~~e~~Office ~~shall~~will develop a manual of procedures ("Utah Judiciary Accounting Manual") to govern all accounting matters, including accounts receivable, accounts payable, trust accounts, cash receipts, the audit thereof, and disbursements, separation ~~the audit of duties, and all relevant administrative~~ procedures needed to comply generally. The procedures shall be in conformity with generally accepted accounting principles (GAAP) and generally accepted auditing standards (GAAS). ~~of budgeting and accounting and shall, at a minimum, conform to the requirements of this Code and state law. The Utah Judiciary Accounting Manual will apply to personnel in Courts of Record and Courts not of Record, and will, at a minimum, conform to the requirements of this Code and state law.~~ Unless otherwise directed by the ~~Judicial~~ Council, the Utah Judiciary Accounting Manual ~~and amendments to it shall will~~ be approved by ~~the~~a majority vote of the Budget and Fiscal Management Committee ("BFMC") ~~following the procedures in (1)(D).~~

(1)(B) **Utah Judiciary Accounting Manual Review Committee.** There is established a Utah Judiciary ~~an~~Accounting Manual Rreview Committee (Accounting Committee) responsible for making and reviewing proposals to promulgate, for repeal, and amending accounting policies and procedures ~~and proposals for promulgating new and amended accounting policies and procedures.~~ The Accounting Committee ~~shall will~~ consist of the following ~~minimum~~ membership:

(1)(B)(i) the finance director ~~of the AOC finance department,~~ who ~~shall~~will serve as chair ~~and shall vote only in the event of a tie;~~

(1)(B)(ii) four support services coordinators ~~who will serve a three year term, and may repeat;~~

(1)(B)(iii) two accountants or clerks with accounting responsibilities from each of the trial Ccourts of Record ~~who will serve a three year term, and may repeat;~~

(1)(B)(iv) a trial Ccourt Executive ~~who will serve a three year term;~~

(1)(B)(v) a court clerk ~~of court who will serve a three-year term~~;

(1)(B)(vi) a clerk with accounting responsibilities from an appellate court ~~who will serve a three-year term, and may repeat~~;

(1)(B)(vii) two members of the Justice Court Education Committee (JCEC);

(1)(B)(viii) the audit director or designee, ~~who shall not vote~~; and

(1)(B)(~~ix~~viii) the director of the ~~state~~ Utah ~~D~~division of Finance or designee, ~~who shall not vote~~.

(1)(C) **Member appointments.** The JCEC members will be appointed by the Board of Justice Court Judges. Unless designated by office, all other members of the Accounting Committee ~~shall~~ will be appointed by the state court administrator, or designee. The ~~AOC department of~~ finance department ~~shall~~ will provide necessary support to the committee.

(1)(D) Terms and voting. Accounting Committee members not designated by office will serve three-year terms. Additional terms must be approved by the state court administrator, or designee. The finance director will vote only in the event of a tie. The audit director and the director of the Utah Division of Finance are nonvoting members.

(1)(~~E~~D) **~~Trial Court~~ eExecutives and court clerks ~~of Court Review~~.** New and amended policies and procedures recommended by a ~~the~~ majority vote of the Accounting ~~manual review c~~ommittee ~~shall~~ will be reviewed and approved by the trial Court Executives and court clerks ~~of court~~ of all Courts of Record and the JCEC. The ~~trial c~~ourt Executives, ~~and court clerks of court~~, and JCEC may endorse or amend the draft policies and procedures or return them m ~~draft policies and procedures~~ to the Accounting eCommittee for further consideration.

Once approved by the ~~trial c~~ourt Executives, ~~and court clerks~~, and the JCEC, the new and amended policies and procedures will be submitted to the Budget and Fiscal Management Committee for approval ~~as noted in (1)(A)~~.

## (2) Revenue accounts.

(2)(A) **Deposits, transfers, and withdrawals.** All courts ~~shall~~ will make deposits with a depository ~~determined~~ deemed qualified by the Aadministrative Office, ~~or make deposits directly~~ with the Utah State Treasurer, or with the treasurer of the appropriate local government entity. The Supreme Court, Court of Appeals, State Law Library, Aadministrative Office, district court primary locations, and juvenile courts ~~shall~~ will deposit ~~daily every business day~~, whenever practicable, but at least ~~but not less than~~ once every three business days. The deposit ~~shall~~ will consist of all court collections ~~of state money~~. District court contract sites and justice courts having funds due to the state



or any political subdivision of the state ~~shall~~will, on or before the 10th day of each month, ~~remit deposit~~ all funds received ~~by them~~ in the preceding month ~~to in a qualified depository with~~ the appropriate public treasurer. The courts ~~shall~~will make no withdrawals from depository accounts.

(2)(B) **Periodic revenue report.** Under the supervision of the ~~C~~Court ~~E~~Executive, the ~~court~~ clerk ~~of the court or designee shall will~~ prepare and submit a revenue report that identifies the amount and source of the funds received during the reporting period and the state or local government entity entitled to the funds.

(2)(B)(i) Juvenile courts and primary locations of the district courts ~~shall~~will submit the report weekly to the ~~A~~Aadministrative ~~O~~Office.

(2)(B)(ii) District court contract sites ~~shall~~will submit the report at least monthly, together with a check for the state portion of revenue, to the ~~a~~Aadministrative ~~O~~Office.

(2)(B)(iii) Justice courts ~~shall~~will submit the report monthly, together with a check for the state revenue collected, to the Utah State Treasurer.

(2)(C) **Monthly reconciliation of bank statements.** The ~~A~~Aadministrative ~~O~~Office ~~shall will~~ reconcile the revenue account upon receipt of the monthly bank statements and weekly revenue reports from the district and juvenile courts, ~~and the monthly bank statements~~ The justice court administrator or designee will reconcile the monthly bank statements for justice courts with a revenue bank account. For all other justice courts, the local government will reconcile the bank statements to the general ledger.

### (3) Trust accounts.

(3)(A) **Definition.** Trust accounts are accounts established by the courts for the benefit of third parties. Examples of funds which are held in trust accounts include restitution, attorney fees, and monetary bail amounts.

(3)(B) **Accounts required; duties of a fiduciary.** District court primary locations and juvenile courts ~~shall~~will maintain a trust account in which to deposit monies held in trust for the benefit of the trustor or some other beneficiary. Under the supervision of the ~~C~~Court ~~E~~Executive, the ~~court~~ clerk ~~of the court shall will~~ be the custodian of the account and ~~shall will~~ have the duties of a trustee as established by law. All ~~other c~~Courts ~~of record and~~ not of ~~R~~Record may maintain a trust account in accordance with the provisions of this rule. Justice courts may deposit trust funds through the local government into a revenue or trust bank account. Justice courts may also deposit trust funds directly into a trust bank account maintained by the court.

(3)(C) **Monthly reconciliation of bank statements**. Each court ~~shall~~ will reconcile its ledgers upon receipt of the monthly bank statement ~~and submit the reconciliation to the administrative office.~~

(3)(C)(i) **Courts of Record.** Courts of Record will submit reconciliations to the Administrative Office.

(3)(C)(ii) **Courts not of Record.** Justice courts that deposit trust funds into a court trust bank account will submit reconciliations to a person in the local jurisdiction who is independent of court operations. For justice courts depositing trust funds with the local government treasurer, the local government will reconcile monthly bank statements to the general ledger and CORIS trust account reports.

(3)(D) **Accounting to trustor.** ~~The courts~~ shall will establish a method of accounting that will trace the debits and credits attributable to each trustor.

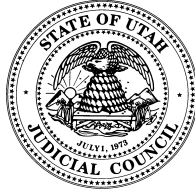
(3)(E) **Monetary ~~b~~Bail forfeitures and; other withdrawals.** Transfers from trust accounts to a revenue account may be made upon an order of forfeiture of monetary bail or other order of the court. Other withdrawals from trust accounts ~~shall~~ will be made upon the order of the court after a finding of entitlement.

(3)(F) **Interest bearing.** All trust accounts ~~shall~~ will be interest bearing. The disposition of interest ~~shall be~~ is governed by Rule 4-301.

~~(4) **Compliance.** The administrative office and the courts shall comply with state law and the Accounting Manual.~~

*Effective: ~~3/11/2022~~ November 1, 2025*

Tab 9



# Administrative Office of the Courts

Chief Justice Matthew B. Durrant  
Utah Supreme Court  
Chair, Utah Judicial Council

July 8, 2025

Ronald B. Gordon, Jr.  
State Court Administrator  
Neira Siaperas  
Deputy State Court Administrator

## MEMORANDUM

**TO: Judicial Council**  
**FROM: Keisa Williams**  
**RE: Ethics Advisory Committee – Member Appointments**

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**Name of Committee:** Ethics Advisory Committee. Membership is set forth in [CJA 1-205\(1\)\(B\)\(ii\)](#).

**Current committee member list:**

NAME	ROLE
Judge Elizabeth Knight	Juvenile court judge
Judge John D. Luthy	Judge from the Court of Appeals
Judge Gregory Lamb	District court judge (1 <sup>st</sup> , 5 <sup>th</sup> , 6 <sup>th</sup> , 7 <sup>th</sup> , or 8 <sup>th</sup> district)
Judge Brooke Larsen	Justice court judge
Judge Todd Shaughnessy	District court judge (2 <sup>nd</sup> , 3 <sup>rd</sup> , or 4 <sup>th</sup> district)
Lara Swenson	Attorney from the Bar or a college of law

**New appointments:** The second terms for both Judge Trent Nelson (justice court judge) and Judge Laura Scott (Chair, district court judge, 3<sup>rd</sup> district) have ended.

The Board of District Court Judges nominated Judge Todd Shaughnessy, 3<sup>rd</sup> District Court, to fill the district court judge vacancy, and the Board of Justice Court Judges nominated Judge Brook Larsen, Pleasant Grove Justice Court, to fill the justice court judge vacancy. Both judges have agreed to serve. Judge Scott recommended appointing Judge Todd Shaughnessy as the new committee chair.

The Management Committee approved both member appointments and the appointment of Judge Shaughnessy as chair.

The mission of the Utah judiciary is to provide an open, fair,  
efficient, and independent system for the advancement of justice under the law.