Meeting Minutes
Utah Supreme Court's Ad Hoc Committee on Regulatory Reform
Community Justice Advocates Work Group
Thursday, August 28, 2025
12:00 – 1:00
Hybrid: Judicial Council Room & Online by WebEx

Attendance in person: Maryt Fredrickson, Nick Stiles, Judge Richard Mrazik, Dr. Jayme Walters, Hayley Cousin, Andrea Donahue

Attendance by WebEx: Stacy Haacke, Janine Liebert, Ciriac Alvarez-Valle, Tanya Rosado, Megan Connelly

Excused: Lakshmi Vanderwerf

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1. Welcome. Theme for today's meeting is evaluating two of Utah's CJA programs—what works, what doesn't, and what are factors limiting the program's scale, reach, and long-term feasibility?

2. Welcome, Dr. Jayme Walters from Utah State University, and Hayley Cousins from CJAU.

3. Approval of minutes. All in favor of approving the minutes. No edits noted.

4. *Discussion of Including Input from CJAs and current/future clients*. This was flagged as a key component in developing programs by the CCJ/COSCA report recently released and echoes one of the things Nikole Nelson shared at our last meeting. It may be useful to include consumers in roundtable discussions or conduct listening sessions to better understand the existing scope of unmet needs. Some CJAs have expressed interest in sharing their feedback about the program and may be able to identify clients interested in sharing as well. Folks may not feel comfortable coming into formalized court spaces for discussion, so efforts should seek to meet them where they are. One possible opportunity could be at Community Court (the next scheduled session is Tuesday, October 21, from 4-7pm at the Kearns library.

5. *Discussion of Front-End Controls*. The Sandbox's original design was all back end controls, meaning only regulating in response to reported harm. The Sandbox has shifted over time and front-end controls, like vetting programs and checking qualifications were reinstated. To scale CJA programs, the programs may not be

able to manage front-end controls on an ongoing basis. Possible alternatives may be professional licensing (similar to or in partnership with DOPL) or oversight by intermediary organizations, like the state bar, that handle training and certification (as it does for lawyers and LPPs). Scalability, enforcement, and resource requirements were noted as challenges.

6. *Program Overviews: CJAU and USU*. Both are operating through Sandbox authorization.
    a. **CJAU**: Runs programs in civil protection, housing stability, and medical debt. Advocates complete 40–60 hours of training, are mentored, and have malpractice coverage via CJAA which obtains it from Nonprofit Legal Services of Utah. The advocates can provide legal advice, prepare court documents, and assist in hearings. Recruitment has largely become organic, though resistance sometimes comes from attorneys or larger organizations. CJAU started at Timpanogos and now stands on its own. It also absorbed Holy Cross Ministries' program. About 40 advocates right now.

    b. **USU**: Focused on debt collection, recruiting mainly social workers and human service professionals. Training involves a 10-week program with both synchronous and asynchronous elements. Advocates are provisionally certified and already serving clients, primarily in Salt Lake but available statewide. A few advocates are serving statewide.

7. *Recruitment and Organizational Buy-In*. Both programs found recruitment feasible through existing networks and word-of-mouth, which then snowballs. Resistance from organizations was minimal, with many supervisors encouraging participation. Some barriers exist in larger institutions and from in-house attorneys. Bandwidth concerns for frontline workers, such as social workers in hospitals, were also highlighted as a barrier preventing partnership. CJAU frequently fields emails asking for the next trainings and opportunities to get involved. CJAU could scale up to host two cohorts a year. The organizations who want advocates want to loop in to an existing organization for the support and infrastructure, not launch their own programs. The advocate certificates are mobile, attached to the advocates, in both CJAU and USU's programs.

8. *Motivations for Participation & Continuity of Service*. Advocates are motivated by the ability to provide comprehensive support within their organizations, reducing the need for multiple referrals. Clients get frustrated when they have to go from

agency to agency, without continuity throughout. It can be retraumatizing for clients to tell stories multiple times at intake at different agencies. Also some agencies are not trauma informed. Existing rapport with clients makes service delivery more effective. Social workers also view training as valuable professional development aligned with meeting their continuing education requirements. A discussion of the value of "warm handoffs" as upstream service followed. There was a recent talk from the 211 service, which is a mental health line, which now takes fewer calls in order to do warm handoffs of the person in crisis to a next service provider because data showed that once the person hangs up, they often don't call the next provider. Pamela Beatse's team reflected the same need for warm handoffs in their civil legal needs assessment.

9. *Retention and Burnout*. Attrition is primarily linked to career changes, job transitions, or relocation rather than dissatisfaction. Burnout remains a challenge, but overall retention is positive, with about 65% of advocates remaining active after a year. But this data is from a small set – only 40 at CJAU and USU's program just started.

10. *Needs and Challenges for CJA Programs*. A roadmap for how the two programs will be able to continue after the Sandbox ends is a key need. Key needs also include clear standards for qualification, affordable and scalable continuing education, and a balance between supervision and autonomy. Excessive supervision requirements may hinder program growth. Funders are hesitant without permanent program structures (i.e., the Sandbox has an end date), and barriers such as fees may limit entry by the advocates. The group discussed aligning CJA standards with those of other professionals, such as social workers which are a large population of advocates, without imposing higher thresholds. Arizona uses a $100 fee and a test. Here, CJAU and USU do the testing and it is free, which reduces the barrier for advocates to enter. The two programs prefer to bear the cost and logistics of testing to streamline entry.

11. *Additional Discussion of Front-End vs. Back-End Controls*. The balance between training/accreditation (front-end) and monitoring/compliance (back-end) was discussed. Too many front-end controls limits scalability. The sandbox model added requirements from both ends, though it is not clear at this point whether as much monitoring is truly necessary as an ongoing need. The current model for lawyers has heavy front-end controls (education and exam) but do not require

midstream controls of supervision or malpractice insurance or data reporting, and the back-end controls exist when things go wrong, via malpractice actions and ethics complaints. The fields where CJAs practice also have their own regulatory structure, so controls should align with those in order to fit will and not create unnecessary barriers. There was a sense from providers that just because CJAs are an innovative solution does not equate to a need for heavy controls just for the sake of controls.

12. *Future Considerations*. Defining the scope of an advocate is a need, i.e., define the ceiling. Marketing and branding should not be done at the front end before a regulatory structure and definition is in place. Questions remain about the scalability of supervision requirements, data collection needs, and the role of supervision in alignment with ABA recommendations. The recent ABA report recommended attorney supervision, but that could be unrealistic due to attorney rates. One possibility is a ratio of supervision that is not 1:1. Maybe 1 attorney for 5 CJAs. The group also discussed whether to follow Alaska, Delaware, and Hawaii's models of requiring CJAs to be housed in legal agencies, which seems to suggest a trend. But then CJA capacity is limited by the capacity of the legal aid organization and creates income caps on the people who can use the services of a CJA. The need for services that CJAs can meet extends beyond those income caps. The Access to Justice Office at the bar has been optimistic about future program development and may be amenable to more conversations about today's topics.

13. Action Items & Conclusion

    No action items.