**Innovation in Law Practice Committee Meeting Minutes**

Date: October 1, 2019

Law and Justice Center

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| Committee members attending:   * 1. Greg Hoole   2. Preston Regehr   3. Dave Duncan   4. Michelle Oldroyd   5. Lorie Koford   6. Steve Chambers   7. Christine Hashimoto   8. Bryan Pack   9. David Clark   10. Tina Wilder   11. Heather S White   12. J.D. Lauritzen | Members Excused:  a. Mark Pugsley  b. Dickson Burton  c. Jackie Morison  d. Mandy Larsen  e. Stephanie Large  f. Romaine Marshall  g. Shantelle Argyle  h. Jamie Lund |
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1. 09-03-2019 minutes approved. Greg Hoole moved to approve; Dave Duncan seconded.
2. Reminder to put together a list of 5-6 things the committee should accomplish in 2020 and report during the November meeting.
3. CLE Report by Michelle Oldroyd
   1. Summer Convention 2019
      1. Michelle provided broad overview on how the convention went. If someone is interested, Michelle can provide more details.
   2. Fall Forum 11/14/19 and 11/15/2019
      1. 11/14/19 Reception and discussion on new report on access to justice work group.
      2. 11/15/19 Fall Forum
         1. Shantelle is presenting on succession planning jointly with Disaster Legal Relief Response Committee.
         2. 6 Categories of Technology Competence
            1. Michelle will email .pdf of 6 Categories handout.
         3. Protecting Client Data
            1. NetDocuments provided a 10-minute introduction to what services the company provides and how it is useful to members.
4. Supreme Court Update (Matt Page and Heather White)
   1. A task group, for which Heather is a member, convened in February to discuss regulatory reforms.
   2. John Lund and Justice Dino Himonas, cochairs, presented taskforce recommendations last month.
   3. It was unanimously approved to allow non-lawyers and lawyers to be in partnership in business providing legal services.
   4. Approved regulatory sandboxes to, under supervision of committee, to start presenting ideas and offering services to see how it will work.
   5. Matt believes we will start to see legal services offered in retail settings, similar to Walmart offering tax services and Walgreens offering a medical clinic.
   6. The report addresses conflicts, advertising fee sharing, data management and other requirements on lawyers and non-lawyers.
   7. California and Arizona are doing something similar.
   8. The information is on the bar website.
   9. Matt will send the committee the report and the Justice Himonas and John Lund SL Tribune article.
   10. It was suggested that we should co-sponsor CLEs on this topic.
5. CLE with Vendors from ABA Tech Show (David Clark)
   1. Windtalker
      1. David will reach out again to get bios.
      2. Main contact is world renowned Opera singer and is currently in Japan.
   2. Hubshare
      1. Will be here for Utah Associate Legal Administration Business Partner Expo.
      2. Ready to go when Bar is.
   3. Automators
      1. Hot Box expert.
   4. Brain Trace
      1. Cyber security from small firm standpoint.
   5. Thomson Reuters
      1. Offering an e-discovery tool that only charges for data storage/hosting. They aren’t charging for processing, access, deduping, etc.
      2. Would be great for smaller litigators.
      3. Uses Nuix.
6. Liz Benegas, General Counsel for NetDocuments in Lehi.
   1. A cloud-based document and email management service that provides enterprise-level security, mobility, disaster recovery, and collaboration solutions for organizations with high data security requirements, such as law firms, financial institutions and insurance industries.
   2. Provides legal technology in DM (display manager) space.
   3. Provides document security and meets audit standards
   4. Looking at offering information about services to bar and members, informing that it’s available, what it is, and services offered.
   5. Maybe explore relationship as bar benefit, and/or provide training on whether or not small firm is meeting ethical standards, etc.
   6. Consider listing on Beneplace. If so, consider whether or not to have an Affinity Agreement like we have with Cleo. Consider whether they pay royalty to bar, or do we pass on the savings to members?
7. November Agenda
   1. Greg would like everyone to pour through the practice portal. If you see anything that can be tweaked, report it.
   2. Each person should put together a list of 5-6 things the committee should accomplish in 2020 and report during the November meeting.
      1. Do we offer 3rd parties that impact the practice of law and get royalty, or just at a discount to members? Or do we have them at a CLE as a sponsor?
         1. Focus on educating the bar on vulnerabilities and providing the information by way of Article on 10 services that you don’t know about that you need.
         2. Merge with 6 Competencies and offer vendors or highlights colleagues that are experts.
         3. Symposium can follow-up with vendors with booth or as faculty.
         4. After, maybe have an affinity relationship with specific vendors.
8. Technology Articles for the Bar Journal – (1,500 words) (Greg Hoole)
   1. November 15, 2019 – Steve Chambers – Virtual Law Firms
   2. November 15, 2019– FastCase
   3. January – Romaine Marshall
   4. February - Bryan Pack – How the Bar is Working with Lawyers that aren’t on the Wasatch Front.
      1. Touch on growth in CLE webcasts.
      2. Broadcast from Bar to court houses and attendees will get live credit.
   5. Other ideas for articles
      1. Non-technology innovation and document management 101
      2. Value of public outreach
      3. 3 service that you don’t know about that you need.
9. Access to Justice wants to revamp website.
   1. This committee is to make recommendations on how to make things available, not to manage the website.
   2. It is not recommended that we revamp the site; work within the confines of the existing infrastructure.
10. Next meeting November 5, 2019.
11. Adjourn