



UCLI

UTAH CENTER FOR
LEGAL INCLUSION

Strategic Plan

2017





1.0 Executive Summary

The Utah Center for Legal Inclusion (UCLI) is a 501(c)(3) nonprofit organization dedicated to advancing the goals of equity and inclusion in Utah's legal profession. By coordinating with the Utah State Bar and its affinity groups, legal employers, government agencies, educational institutions, businesses, and community partners, UCLI strives to enhance organizational inclusion, facilitate educational opportunities and professional advancement for students and attorneys with diverse backgrounds, assist in eliminating bias in Utah's justice system, and track the progress of legal inclusion efforts throughout the state. UCLI invites all to participate in its initiatives, which will help strengthen Utah's legal institutions in an increasingly diverse state.

UCLI is the brainchild of past presidents of the Utah Minority Bar Association who recognized the need for a comprehensive organization to address the specific needs of Utah's legal community. Acknowledging UMBA's significant work in this field, along with the work of other similar organizations that represent and serve specific groups within the Utah bar, UCLI seeks to identify undeveloped areas of improvement and coordinate efforts to create meaningful progress toward better equity and inclusion across Utah's entire legal profession. In order to gain widespread support throughout the profession and build a strong framework for its efforts, UCLI formed an inaugural Board of Directors in November 2016 with representation from various segments of the legal profession and from all political and ideological backgrounds.¹ The Board of Directors has worked over the past year to identify and refine UCLI's scope and purpose. It now submits the following Strategic Plan, which outlines UCLI's six primary areas of focus and corresponding goals for the next five years.

- *Education:* UCLI will develop a comprehensive education and mentoring initiative that serves diverse students in achieving academic and professional goals in the law, beginning in K-12 schools and continuing through undergraduate institutions and law schools.
- *Advancement:* UCLI will support and encourage professional advancement for all attorneys. As a continuation of the mentoring efforts developed by the Education Committee, UCLI will develop an initiative that supports attorneys by providing mentoring and advancement opportunities from the time an attorney enters the legal profession in Utah and throughout her or his legal career. As a particular area of focus, UCLI will promote equity and inclusion on Utah's bench by identifying and preparing qualified judicial candidates with diverse backgrounds and assisting the candidates during the appointment process.
- *Organizational Inclusion:* UCLI will work with attorneys, legal employers, and Utah's business community to develop programs, including a UCLI Certification Program, to ensure inclusive work environments, satisfy client requirements, and provide relevant training. UCLI will also assist with training and practices for the judiciary to help eliminate potential biases on the bench.
- *Community Outreach:* UCLI will build partnerships with local businesses and other community groups to build support for inclusion efforts and to develop more effective programs and plans that meet the legal needs of diverse community interests.

¹ The founding board members include Samuel Alba, Nathan Alder, John Baldwin, Aden Batar, Adrienne Bossi, Melinda Bowen, Robert Clark, Justice Christine Durham, Matthew Durham, Kathy Dryer, Robert Flores, Amy Fowler, Sim Gill, James Jardine, Annette Jarvis, Spencer Jones, Juan Carlos Judd, Clemens Landau, Justice Thomas Lee, Carol Lear, Jane Marquardt, Anne Milne, Carolina Núñez, Kristen Olsen, Sean Reyes, Robert Rice, Trystan Smith, Rodney Snow, James Sorenson, Sarah Starkey, Judge Vernice Trease, Angelina Tsu, and Francis Wikstrom.



- *Tracking Progress:* UCLI will work with the Utah State Bar and other partners to gather reliable data reflecting the current demographics of Utah’s legal profession and track the progress of equity and inclusion initiatives over time.
- *Development:* UCLI will proceed with structured fundraising plans to ensure its long-term sustainability.

2.0 Background

The Utah State Bar traces its roots back to the early 1900s when several Utah lawyers formed an association with the hopes of improving communication within the legal community and providing service to the general public. During the twentieth century, the legal profession made progress toward including people of various backgrounds, including women and racial minorities. Between 1872 and 1975, the Utah State Bar admitted ninety-one women, and the next year an additional twenty-eight women graduated, which helped the Bar push past the mark of one hundred women attorneys. The first minority attorney in Utah was admitted to practice in 1909, and by 1980, fifty minority attorneys had been admitted.

While UCLI celebrates these milestones, continued progress has been slow and has stalled in recent years. Despite the fact that the overall population in Utah is becoming more diverse, the legal profession has not followed the same trajectory. According to the 2010 census, 49.8% of Utah’s population were female. In 2016 follow-up surveys, 22.8% of Utahans reported belonging to one or more racial minority group. In addition, Census Bureau projections estimate the proportion of racial minorities in Utah will grow to 30% of the population by 2050. Yet, a 2011 Dan Jones survey of Utah State Bar members showed only 24% were female and only 7% identified as racial minorities. We recognize that race and gender are not the only relevant categories, but statistics for disability, sexual orientation, religion, and other demographics are more difficult to obtain. Nonetheless, race and gender statistics are indicative of the fact that the legal profession continues to be primarily composed of white male attorneys.

The Utah State Bar and several existing organizations have engaged in efforts to ensure the inclusiveness of Utah’s legal profession. For example, the Utah Minority Bar Association proposed and the Utah State Bar adopted the Pledge to Racial and Ethnic Diversity. Several legal employers in Utah signed the pledge, indicating their commitment to increase the hiring, retention, and promotion of attorneys of color. Women Lawyers of Utah has developed various inclusion programs, including the development of a special project committee focused on community outreach to groups that provide educational and other resources to girls in elementary and secondary schools. In addition, the LGBT and Allied Lawyers of Utah provide scholarship funds to LGBTQ students pursuing legal careers. These examples provide a small sampling of the existing efforts aimed at promoting equity and inclusion in Utah’s legal profession. UCLI does not seek to replace or duplicate the significant work of these and other groups but instead seeks to provide support, coordinate efforts, and collaborate to identify undeveloped areas of improvement. State bar associations and nonprofit organizations in other states have embraced similar programs and have seen positive results. Such efforts take various forms around the country, but UCLI recognizes that Utah faces unique challenges. Accordingly, UCLI seeks to develop a structure that will meet the specific needs of Utah’s legal community, with an eye toward creating programs that can evolve as Utah’s demographics change.



2.0 Organizational Structure

2.1 Management and Personnel

UCLI is managed by its Board of Directors, which is comprised of voting board members. UCLI's programs and initiatives have been created, and will be run primarily through, its committees—with each committee receiving support from several non-voting committee members. Voting members of the Board of Directors may also choose to serve on committees to assist with specific programs and goals. UCLI's Board of Directors and committees include several members from the legal and business communities, as well as representatives from community partners. Members of the Board of Directors and committees serve for terms of up to three years, with terms staggering, and with the opportunity for renewal upon the expiration of each term. Please visit www.utahcli.org for more information about our Board and committee members. Over the next five years, a team of additional management and support personnel will be assembled to manage and grow the organization.

The Board of Directors exercises fiduciary responsibility for UCLI and manages the organization's major operations.

The Board of Directors and committees receive additional support from UCLI's secretary, LaShel Shaw; treasurer, Karina Sargsian; communications director, Marshall Thompson; and other committee members.

2.2 Voting Board Members

Voting members of the UCLI Board of Directors include UCLI's two co-Chairs, Justice Christine Durham (retired) and Francis Wikstrom; UCLI's two co-Presidents, Melinda Bowen and Kristen Olsen; committee chairs; a representative from each law school in Utah; and a representative from each affinity group of the Utah State Bar, including LGBT & Allied Lawyers of Utah, the Utah Minority Bar Association, Women Lawyers of Utah, and the Young Lawyers Division. Representatives from the law schools and affinity groups may be chosen by the groups which they represent, but each representative will serve for a three-year term, with terms staggering as to the date of transition or renewal.

2.3 Personnel and Future Hiring Plans

In its initial year, UCLI has enlisted Marshall Thompson to serve as a volunteer in the position of Marketing Director. UCLI also plans to enlist volunteers to serve as Fundraising Coordinator, Mentoring Coordinator, and General Counsel.

Pending the necessary funding, UCLI will also hire additional paid personnel to assist with daily operations. First, UCLI will begin a search for a part-time Executive Director. If necessary, UCLI will also hire a part-time Office Manager to assist the Executive Director.

3.0 Areas of Focus

To advance UCLI's goals, UCLI operates using a committee structure, with each committee dedicated to one of UCLI's six areas of focus: (1) Education Committee; (2) Advancement Committee; (3) Organizational Inclusion Committee; (4) Community Outreach Committee; (5) Tracking Progress Committee; and (6) Development



Committee. Members of the Board of Directors and other volunteers serve as committee members, and each committee develops and manages programs to achieve measurable progress in its particular area of focus. The following summarizes the efforts of each committee to date and the committee's short- and long-term goals.

3.1 Education Committee

UCLP's Education Committee seeks to develop programs that assist students from various backgrounds in achieving their academic and professional goals in the law. The committee supports and enhances programs serving students in K-12 schools, universities, and law schools, in an effort to introduce students to legal principles and practice, to connect students with financial and other resources, and to provide meaningful mentoring opportunities.

3.1.1 K-12 Programs

The Education Committee has identified several existing programs that serve the needs of K-12 students and has begun developing partnerships with the groups operating these programs. In particular, the committee has developed a relationship with both Latinos in Action (LIA) and the V(i)llage Program.

LIA is a nonprofit organization that provides college-readiness resources for Latino students in middle school and high school. LIA has developed curriculum for an elective course offered in over one hundred schools throughout the state. Teachers provide instruction and mentoring in college preparation, including targeted lessons related to college entrance requirements and transitioning to higher education. As part of the course, LIA students also complete a volunteer requirement by providing tutoring to elementary school students. In addition, the program has created student organizations at many of the state's universities, to provide a continuing support system for Latino students transitioning to higher education. Over the next year, UCLI will work with LIA to develop curriculum specifically focused on the legal profession and will assemble UCLI volunteer attorneys to provide in-class presentations on the law, along with special presentations at LIA conferences focused on legal careers. UCLI will also assist in developing programs for interested LIA college students to receive mentoring related to the law school admission process and the transition to law school.

UCLI has also met with representatives of the V(i)llage program, which is a program particularly focused on Black students, with the goals of developing leadership skills, elevating cultural pride, and bolstering positive academic outcomes. The program has created various seminars and conferences to introduce students to helpful resources, but these opportunities have focused on general college preparation or on STEM careers. UCLI's Education Committee has begun work to create a framework for similar conferences focused on legal careers and will complete this coordination with the V(i)llage program over the next year or two to ensure a continuing partnership.

In the next three years, the Education Committee will also identify groups that have begun outreach efforts to Utah's female students and students of other backgrounds, such as Asian/Pacific Islander students, refugee students, LGBT students, and others. UCLI will



lend support to existing groups and/or take lessons learned from LIA and the V(i)llage program and apply proven methods to other underrepresented students.

UCLI's Education Committee will also coordinate with the Utah State Bar's Law-Related Education department to analyze existing programs such as Law Day and Kids Court, with an eye toward growing these programs and ensuring a framework of continued mentoring for students who show interest in legal careers.

In addition, UCLI will support existing recruiting efforts in cooperation with the state's law schools. For example, during the summer of 2017, the J. Reuben Clark Law School began a weeklong camp called the Civics, Law, and Leadership Camp, in which students ranging in age from fourteen to sixteen were invited on campus to learn about legal careers and leadership skills. The inaugural group included boys and girls from diverse backgrounds who came from twenty-two states, along with one international student. UCLI will communicate with BYU Law representatives to lend volunteer support for the program in future years and to learn about successes that may be applied while developing a similar program at the University of Utah.

3.1.2 Undergraduate Programs

UCLI has met with representatives of diversity and prelaw programs at the University of Utah and Westminster College, to begin the process of identifying ways that UCLI attorneys can create opportunities to educate students about law school, create mentor relationships, and provide financial assistance to students as they prepare for law school. Over the next three years, Education Committee representatives will meet with the remaining undergraduate institutions in the state and will develop a consistent mentoring program for all schools. UCLI will also recruit and organize volunteer attorneys to serve as mentors to undergraduate students. The details of the mentoring program will be developed through discussions with the various university and college representatives.

In the next five years, UCLI will research the possibility of creating undergraduate courses focused on legal careers and issues, with the hope of encouraging further legal study in law school.

3.1.3 Law School Programs

UCLI's Education Committee includes representatives from the S. J. Quinney College of Law at the University of Utah and the J. Reuben Clark Law School at Brigham Young University. With the help of these representatives and other committee members, the Education Committee will develop a mentoring program for each law school that ensures law students have access to resources for navigating legal academia, networking opportunities, financial assistance, career guidance, and support for the transition from law school into careers. UCLI will coordinate with the Utah Minority Bar Association, Women Lawyers of Utah, LGBT and Allied Lawyers of Utah, the Utah State Bar's Young Lawyers Division, and other related organizations, to build on existing programs offered by these



groups and ensure a coordinated effort that reaches the greatest number of law students in the state.

3.2 Advancement Committee

UCLI's Advancement Committee will analyze best practices for helping all attorneys achieve their personal professional advancement goals. The committee will build on the efforts of the Education Committee by creating additional mentoring programs focused on attorneys who have entered the legal profession, with the goals of guiding attorneys through the transition from law school to practice and furthering the personal advancement goals of individual attorneys within various legal fields. UCLI will develop its new lawyer mentoring program over the next few years, in coordination with Women Lawyers of Utah, the Utah Minority Bar Association, LGBT and Allied Lawyers of Utah, and the Utah State Bar's New Lawyer Training Program.

For the next five years, the committee's primary focus will be on increasing equity and inclusion in Utah's judiciary. This project will have at least two objectives: (1) identifying, encouraging, and mentoring diverse candidates through the judicial appointment process, and (2) cooperating with nominating officials in the selection of diverse candidates. On the first prong, Women Lawyers of Utah and the Utah Minority Bar Association have engaged in related, targeted efforts in the past. Accordingly, a special committee will include representatives familiar with these past efforts, so the group can assess the strategies that have been successful and those that have not. UCLI will also provide institutional support to ongoing efforts by these groups and will assist in developing a coordinated strategy that satisfies the interests of all those involved.

In coordination with existing efforts, UCLI plans to identify promising judicial candidates in each district throughout Utah, prepare the candidates for the application and interview process, and provide support throughout the appointment process.

With respect to interactions with nominating officials, UCLI will develop relationships with nominating commissions, with those who select members of nominating commissions, and with elected officials who identify and encourage candidates to apply for vacancies on nominating commissions and encourage the bodies who fill such vacancies to consider candidate's backgrounds and the need for diverse viewpoints. The committee and sub-committee will continue to foster relationships with the governor, State senators, and other elected officials to ensure that qualified appointees are successfully confirmed.

3.3 Organizational Inclusion Committee

Over the next five years, UCLI's Organizational Inclusion Committee will focus on three projects. First, in coordination with Utah's business community, the committee will create a UCLI Certification Program that will provide attorneys and legal employers with tools to advance inclusion and equity efforts within their organizations, even when hiring diverse attorneys is difficult due to Utah's unique demographics. The certification process will be used by law firms to illustrate to existing and potential clients that they are committed to diversity and inclusion. The UCLI certification process will include in-firm trainings, a policy audit, sponsorship opportunities, and creative solutions to inclusion barriers.



Second, this committee will work with the Utah State Bar to increase inclusion within the Bar's educational programs. This will include a CLE requirement, and an increased number of presentations that focus on equity and inclusion training for Utah attorneys and new attorneys who participate in the Utah State Bar's New Lawyer Training Program. The committee will identify local and national speakers to ensure these presentations cover relevant material and research-based practices.

Third, the committee will cooperate with judicial representatives to assess judicial training on bias, equity, diversity, and inclusion, and to identify policies, training, and best practices that are aimed at creating a judicial system more inclusive to various attorneys and parties.

3.4 Community Outreach Committee

UCLI's Community Outreach Committee will identify community programs that may benefit from a presence from Utah's legal community. In addition, this committee will enlist the help of a student intern to assist with the project of creating a platform that collects volunteer opportunities into a single location for ease of access and that creates a comprehensive database of attorneys willing to participate in various volunteer opportunities that correspond with their interests. The Utah Bar and its affinity groups will assist in recruiting members to provide information for the volunteer platform, and UCLI will further publicize among the general Utah State Bar membership.

Over the next year, the committee will also cooperate with UCLI's Marketing Director to develop and disseminate materials that educate the community on resources available through UCLI. The committee will gather information on programs that may provide helpful assistance outside UCLI's specific scope, such as those providing resources for landlord/tenant issues, low- or modest-means representation, immigration issues, etc. UCLI will gather informational resources and act as a liaison to direct community members and interested attorneys to partner organizations that provide the relevant services.

3.5 Tracking Progress Committee

Data, particularly reliable and accurate data, is difficult to find for legal associations and employers. The lack of data also creates difficulty in assessing whether an institution's practices promote or prevent inclusive environments. Accordingly, during the next five years, the Tracking Progress Committee will focus on developing methods to collect data for two groups: (1) the Utah State Bar as a whole, and (2) legal employers in the state. The most recent demographic data available for the Utah State Bar is a Dan Jones survey conducted in 2011. UCLI hopes to develop a systematic approach to gather data and keep the data current on an ongoing basis. UCLI will coordinate with Bar staff in this effort and may consult with statistical professionals or scholars at local universities, to develop best practices. The committee will also prepare surveys to disseminate among participating legal employers, to understand hiring and other practices and assess how those practices affect recruiting and retention efforts aimed at diverse attorneys.

3.6 Development Committee

In its initial year, UCLI has received financial support from several UCLI Board members and other donors such as the Utah State Bar. Over the next five years, UCLI will seek additional funding from



businesses and private donors to sustain steady growth. The overall fundraising plan will proceed in three phases: Phase I will focus on raising seed money and developing strategies for targeted solicitation of donations; Phase II will put strategies into action to secure donations from sponsors; Phase III will extend fundraising efforts to soliciting grants from government and other sources.

During Phase I, which will span the next twelve to eighteen months, UCLI will first hold one or more kickoff events, to introduce UCLI and its purposes to Utah's legal community. UCLI will make a targeted effort to invite potential donors to the event(s). In addition, the Development Committee will act on plans to secure donations from various sources. The Development Committee will ensure all UCLI Board members have personally donated, develop a list of specific donors within legal employers and other companies to approach for donations, compile informational packets for potential donors, prepare a letter to be included with packets for all new admittees to the Utah State Bar, and begin disseminating solicitation materials and making fundraising contacts. These materials will describe sponsorship levels and the attendant benefits at each level. UCLI hopes to raise \$50,000 during Phase I.

During Phase II, which will continue in approximately years two and three after the date of this plan, the Development Committee will determine which fundraising strategies and products best suit UCLI, choosing from options such as annual sponsorships, one-time donations, sustaining gifts, annual fund campaigns, and/or special events. In the meantime, however, the committee will take the lead in planning smaller fundraising events that continue to highlight the purposes of UCLI. Once the committee decides on a chosen fundraising method, it will develop the logistical framework for enacting the ongoing practice.

In Phase III, the Development Committee will expand its efforts to grant proposals, made more effective by additional development of the programs created and grown by other committees such that the Development Committee can reasonably approach government and other philanthropic donors and explain a specific project benefited by the requested grant.

4.0 Conclusion

UCLI intends to evaluate the goals and structures outlined in this Strategic Plan at the end of each year in order to ensure it is utilizing resources in the most effective and strategic way possible and adjusting to the evolving demographics and needs in Utah. To that end, UCLI's Executive Committee will publish an Annual Report by January 31 of each year, beginning in 2019. This report will summarize UCLI's evolving objectives, programs and initiatives, progress, and finances. It will be publically available on the UCLI website: utahcli.org.

Finally, UCLI recognizes the unique challenges and sensitivities inherent in the topics of diversity, equity, and inclusion. It will make every effort to be sensitive to all groups and interests that exist in Utah and specifically, in Utah's legal community. To that end, UCLI welcomes your feedback, suggestions, and productive criticism. Please email utah.ucli@gmail.com to let us know how we can improve and to share your ideas for achieving UCLI's objectives.