



# The State Bar *of California*

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## ACTION SUMMARY

### Task Force On Access Through Innovation of Legal Services

December 5, 2018

10:00 a.m. – 4:00 p.m.

The State Bar of California  
180 Howard Street  
Rooms 4A-C  
San Francisco, CA 94105

Phone: 855-520-7605

Pass Code: 2535410212#

**Members Present:** Justice Lee Edmon (Chair), Andrew Arruda, Barbara Arsedo, Tara Burd, Hon. Wendy Chang, Jean Clauson, Valarie Dean, Margie Estrada, Lori Gonzalez, Bridget Gramme, Andrew Kucera, Joanna Mendoza, Kevin Mohr, Heather Morse, Joyce Raby, Daniel Rice, Allen Rodriguez, Toby Rothschild, Daniel Rubins, and Mark Tuft.

**Not Present:** Abhijeet Chavan and Joshua Walker

**Others Present:** Brady Dewar, Randall Difuntorum, Mia Ellis, Greg Fortescue, Donna Hershkowitz, Mimi Lee, Lauren McCurdy, Doan Nguyen, Teresa Schmid (by telephone), Andrew Tuft, and Leah Wilson.

## ACTION SUMMARY

### A. Chair's Report

#### 1. **Oral Report**

The Chair called the meeting to order and asked staff to take a roll call of the task force members.

#### 2. **Welcome and Introductions**

The Chair welcomed the members and conducted introductions of all persons present.

#### 3. **Public Comment**

The Chair inquired but there was no one present who wished to provide public comment.

**4. State Bar Staff Support and Liaisons**

The Chair recognized Mr. Difuntorum who explained the staff support for the task force.

**B. Administrative Matters**

**1. Overview of State Bar Policies, including Bagley-Keene Open Meeting Act**

The Chair recognized Mr. Dewar who provided a presentation on State Bar policies.

**2. Schedule of Meetings**

The Chair recognized Ms. McCurdy who reported on the status of the task force's schedule of meetings. All members were asked to promptly inform Ms. McCurdy by email if there were any proposed meetings that posed a potential scheduling conflict.

**C. Discussion of Charter and Subcommittee Work Plan**

**1. Task Force Charter**

The Chair led a discussion of the task force charter.

**2. Task Force Subcommittees**

The Chair recognized Mr. Difuntorum who presented the task force plan for using concurrent subcommittee break-out sessions to address distinct sections of the task force charter.

**3. Form of Report and Recommendations**

The Chair recognized Mr. Difuntorum who presented an overview of the form and content of the anticipated task force report and recommendations. Mr. Difuntorum referred to the January 2, 2002 Final Report and Recommendations of the California Supreme Court Advisory Task Force on Multijurisdictional Practice as an example of the form and type of content that will be needed for the task force's report.

**4. Resources**

The Chair recognized Ms. Lee who presented instructions for accessing a shared folder that contains task force resources including substantive reports and articles as well as administrative materials.

**D. Discussion/Presentation**

**1. Presentation on Emerging Technologies Transforming Legal Systems**

The Chair recognized IV Ashton, founder and President of LegalServer and Houston.AI, who provided a brief presentation on advances in technology and AI and the impact on the delivery of legal services.

**2. Presentation on the Legal Services Market and Studies of Regulatory Changes**

The Chair recognized Professor William Henderson, editor of Legal Evolution, who provided a brief presentation on the landscape of the legal services market. Following his presentation, the Chair recognized Professor Kevin Mohr, former Chair of the State Bar Standing Committee on Professional Responsibility and Conduct, who provided a brief presentation on the Rules of Professional Conduct that typically are identified as obstacles to innovation in the delivery of legal services.

**3. Concurrent Subcommittee Breakout Sessions**

ATILS transitioned to separate breakout sessions to allow each subcommittee to conduct an introductory open discussion of some of the key questions to be studied.

**a. Subcommittee Discussion on Unauthorized Practice of Law/Artificial Intelligence**

The subcommittee met and held a general discussion. No action was taken.

**b. Subcommittee Discussion on Rules and Ethics Opinions**

The subcommittee met and held a general discussion. No action was taken.

**c. Subcommittee Discussion on Alternative Business Structures/Multi-Disciplinary Practice**

The subcommittee met and held a general discussion. No action was taken.