



The State Bar of California

ACTION SUMMARY

Task Force on Access Through Innovation of Legal Services Subcommittee on Alternative Business Structures/Multi-Disciplinary Practice

February 28, 2019

11:00 a.m. – 2:00 p.m.

The State Bar of California
845 South Figueroa Street
Board Room 2nd Floor
Los Angeles, CA 90017-2515

Members Present: Andrew Arruda (Chair), Mark Tuft (Vice-Chair), Jean Clauson, Bridget Gramme, and Joanna Mendoza.

Not Present: Valerie Dean

Others Present: Joyce Raby and Doan Nguyen

ACTION SUMMARY

A. Chair's Report

1. **Roll Call**

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

2. **Call for Public Comment**

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

3. **Chair's Report**

The Chair welcomed the members and thanked everyone for submitting their assignments.

4. **Staff Report**

Staff reminded members to email all questions, assignments, and other communications to Doan Nguyen at doan.nguyen@calbar.ca.gov and copy the generic ATILS email at atils@calbar.ca.gov.

5. **Approval of Action Summary from the January 18, 2019 Meeting**
Joanna Mendoza moved, and Mark Tuft seconded. The Motion was approved by unanimous roll call vote with five approved.

B. Action / Report and Recommendation

1. **Alternative Business Structures and Multi-Disciplinary Practice**
The subcommittee met and held a general discussion on lessons learned from other jurisdictions, protecting consumers, definition of law-related services, potential funding sources, potential success criteria, and preserving attorney-client relationships.
2. **Discussed the following potential recommendations to the Task Force at large:**
 - a. Lawyers in traditional practice and firms stay under the current regulatory framework with a mind towards expanding access to justice through innovation.
 - b. We recommend that we widen the scope of our charter to include entities which may or may not have lawyer ownership or operational management and/or control.
 - c. The State Bar would regulate these entities, but its scope would cover the delivery of legal services as well as law-related services.
 - d. This new model being proposed would include for-profit entities and would not be limited to not for profits.
 - e. All entities providing legal services would involve at least one lawyer in the organization authorized to practice in California to ensure a form of quality control and adherence to regulation or other another means of ensuring quality control over the legal product, device or service.
3. **Discussion of assigned questions for next meeting:**
 - a. Which areas is access to justice most needed? (Jean Clauson)
 - b. What would the source of funding be for the implementation of ABS systems? (Jean Clauson)
 - c. What could potential success criteria look like when it comes to these new entities? (Jean Clauson)
 - d. Research law firm discipline. (Mark Tuft)
4. **Discussion of potential future questions:**
 - a. How are we going to ensure that our suggestions have the intending result of furthering access to justice?
 - b. How do we track the effects of these changes from an A2J standpoint? How to we gather this data?

ADJOURN

In compliance with the Americans with Disabilities Act, those requiring accommodations at this meeting should notify Lauren McCurdy at (415) 538-2107. Please provide notification at least 72 hours prior to the meeting to allow sufficient time to make arrangements for accommodations at this meeting.

The notice and agenda is available at: <http://board.calbar.ca.gov/Committees.aspx>.