



# The State Bar of California

---

## ACTION SUMMARY

**Task Force on Access Through Innovation of Legal Services  
Subcommittee on Unauthorized Practice of Law / Artificial Intelligence  
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  
(213) 765-1000**

**Members Present:** Abhijeet Chavan (Chair), Hon. Wendy Chang (Vice-Chair), Margie Estrada, Heather Morse, Daniel Rubins, and Joshua Walker.

**Not Present:** Margie Estrada.

**Others Present:** Brady Dewar (State Bar staff), Randall Difuntorum, Justice Edmon, Gregory Fortescue, Donna Hershkowitz, Mimi Lee, and Leah Wilson.

## 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 subcommittee 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 summarized the accomplishments of the last meeting, and summarized the agenda for the current meeting.

#### 4. **Approval of Action Summary from the January 18, 2019 Meeting**

The Action Summary from the January 28, 2019 meeting was unanimously approved.

**B. Action / Report and Recommendation**

1. Presentation and discussion of results from Assignments from January 18, 2019 Meeting
  - a. Standards technology providers should have to meet to have their technology licensed by State Bar
  - b. Process State Bar should follow to certify technology providers
  - c. Process for enforcement of standards
  - d. Standards of corporate responsibility and enforcement of such standards
2. Identification and discussion of agreed principles to be proposed for State Bar regulation of artificial intelligence and unauthorized practice of law
3. Identification of additional open questions with respect to artificial intelligence and unauthorized practice of law
4. Discussion of Next Steps and Research Assignments for April Meeting

The subcommittee engaged in a discussion of topics related to the assignments prepared after the January 28, 2019 meeting, including: standards technology providers should have to meet to have their technology licensed by the State Bar; the process the State Bar should follow to certify technology providers; the process for enforcement of standards; and the standards of corporate responsibility and enforcement of such standards. No formal action or recommendation was undertaken, though the subcommittee agreed that it would present to the Task Force as discussion items ideas from its discussion. Further, the subcommittee identified open questions and assigned them to subcommittee members to report back on in writing prior to the April 8, 2019 meeting.

**C. Consideration of Staff Recommendations**

**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>.