



# The State Bar of California

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## Task Force On Access Through Innovation Of Legal Services

Friday, February 28, 2019

10:30 a.m. – 11:00 a.m.

Resumes at: 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

Phone: 1-855-520-7605

Pass Code: 253-541-0212#

**Members Present:** Justice Lee Edmon (Chair), Andrew Arruda, Tara Burd, Hon. Wendy Chang, Abhijeet Chavan, Jean Clauson, Johann Drolshagen, Lori Gonzalez, Bridget Gramme, Andrew Kucera, Joanna Mendoza, Kevin Mohr, Heather Morse, Joyce Raby, Daniel Rice, Allen Rodriguez, Toby Rothschild, Daniel Rubins, Mark Tuft, and Joshua Walker.

**Not Present:** Simon Boehme and Margie Estrada.

**Others Present:** Brady Dewar, Randall Difuntorum, Mia Ellis, Greg Fortescue, Donna Hershkowitz, Mimi Lee, Doan Nguyen, Teresa Ruano, Teresa Schmid, Andrew Tuft, and Leah Wilson.

Additional Locations  
Hyatt Regency Chicago  
Ballroom Level - Grand Suite 4  
151 E. Wacker Drive, Chicago, IL 60654

## 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 in-person who wished to provide public comment. Two telephone participants: Drew Amerson; and Jason Richmond were recognized by the Chair and provided comments. Drew Amerson, Director of Center of Law and Technology at UC Hastings, expressed his support for the work of

the Task Force. Jason Richmond of Live Litigation, a tech company that provides a service which decreases the cost of litigation, inquired on how the State Bar and other agencies will increase the exposure of these kinds of technology.

**3. Chair's Report**

The Chair recognized Mr. Drolshagen who introduced himself. The Chair explained the meeting schedule and instructed subcommittee Chair's to prepare an oral report for the afternoon plenary session. The Chair led a discussion on potential speakers,

**4. Staff Report**

The Chair recognized Mr. Difuntorum who reported that: (1) at the April 8th meeting in San Francisco, we will invite 1-2 speakers that will assist the Task Force in developing recommendations and requested Task Force members submit speakers for consideration to staff; (2) an additional August meeting will be added to the schedule to consider public comments, review the survey responses, and possibly invite more speakers; and (3) the ABA and APRL will be holding their Annual Meeting in San Francisco so we are exploring the idea of either a public hearing/roundtable/town hall event on August 10.

**a. Social Media Guidelines**

The Chair reported that new Social Media Guidelines have been developed by the State Bar.

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

The Action Summary of the January 18, 2019 meeting was approved (18 yes, 0 no, 0 abstain).

**B. Reports of Subcommittees**

**1. Unauthorized Practice of Law/Artificial Intelligence**

The Chair recognized Mr. Rubins who gave an oral report on the subcommittee's meeting and led the task force in a discussion of issues and possible proposals under consideration by the subcommittee.

**2. Rules and Ethics Opinions**

The Chair recognized Ms. Burd who gave an oral report on the subcommittee's meeting and led the task force in a discussion of issues and possible proposals under consideration by the subcommittee.

**3. Alternative Business Structures/Multi-Disciplinary Practice**

The Chair recognized Mr. Arruda who gave an oral report on the subcommittee's meeting and led the task force in a discussion of issues and possible proposals under consideration by the subcommittee.

**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>.