



The State Bar *of California*

ACTION SUMMARY

Task Force on Access Through Innovation of Legal Services
Subcommittee on Alternative Business Structures/Multi-Disciplinary Practice
April 8, 2019
11:00 a.m. – 2:00 p.m.

The State Bar of California
180 Howard Street
Board Room, 4th Floor
San Francisco, CA 90017-2515

Phone: 855-520-7605
Pass Code: 2535410212#

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

Not Present: Jean Clauson and Valerie Dean

Others Present: Justice Lee Edmon, Randy Difuntorum, Soh-Yeon Lee, 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. **Approval of Action Summary from the February 28, 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. 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. Entities can be composed of lawyers, non-lawyers or a combination of the two however, regulation would be required and may differ depending on the structure of the entity.
 - d. This new model being proposed would include for-profit entities and would not be limited to not for profits.
- 2. Discussed the following issues:**
 - a. Sandbox quicksand problem
 - b. Fee splitting and advertising rules have to be revised in addition to unauthorized practice of law
- 3. All members agreed to provide comments to the following questions at next meeting:**
 - a. Review Legal Services Corporation's 2017 Justice Gap Report to understand where access to justice seems to be most problematic ahead of the June release of the California Access to Justice report
 - b. What will the entities be able to do or not do?
 - c. What is regulated? The individuals? The entity itself?
 - d. What organization(s) will regulate these entities?

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>.