



The State Bar of California

ATILS Agenda Item A.5.
05-13-19 Meeting

Task Force on Access Through Innovation of Legal Services

Monday, April 8, 2019

10:00 a.m. – 12:30 p.m.

Resumes at: 2:30 p.m. – 4:30 p.m.

The State Bar of California

180 Howard Street

Board Room, 4th Floor

San Francisco, CA 94105

(415) 538-2116

Members Present: Justice Lee Edmon (Chair), Andrew Arruda, Simon Boehme, Tara Burd, Hon. Wendy Chang, Johann Drolshagen, Lori Gonzalez, Bridget Gramme, Andrew Kucera, Joanna Mendoza, Kevin Mohr, Joyce Raby, Daniel Rice, Allen Rodriguez, Toby Rothschild, Daniel Rubins, and Mark Tuft.

Not Present: Abhijeet Chavan, Jean Clauson, Margie Estrada, Heather Morse, and Joshua Walker.

Others Present: Brady Dewar, Randall Difuntorum, Mia Ellis, Greg Fortescue, Donna Hershkowitz, Mimi Lee, Jennifer McGlone (Legal Court Buddy), Doan Nguyen, Prof. Rebecca Sandefur, Andrew Tuft, 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 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. The Chair reported that a public comment letter from Off the Record has been received and included in the agenda materials. Mr. Tuft reported that there is an Australian study on artificial intelligence and ethics which will be circulated by staff.

3. Chair's Report

The Chair recognized Simon Boehme, a new member to the Task Force, and asked him to introduce himself.

4. Staff Report

The Chair recognized Mr. Difuntorum who reported that: (1) an additional meeting on August 9th in San Francisco has been scheduled; (2) on August 10th a public hearing will be scheduled to coincide with the ABA Annual Meeting which will be held in San Francisco; (3) Mr. Difuntorum and Ms. Wilson attended the Stanford Legal Design Lab Sandbox and gave an oral report on the Utah Supreme Court's interest in a regulatory sandbox project; and (4) subcommittees should begin to prepare their respective parts of the Task Force's report.

5. Approval of Action Summary from the February 28, 2019 Meeting

The Action Summary of the February 28, 2019 meeting was approved (16 yes, 0 no, 0 abstain).

B. Guest Speakers

1. Prof. Rebecca Sandefur

The Chair recognized Prof. Sandefur who gave a presentation on the need of technology driven legal solutions to increase access to justice for low-income communities.

C. Reports of Subcommittees

1. Unauthorized Practice of Law/Artificial Intelligence

The Chair recognized Judge Chang 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. Following discussion, a motion was made to recommend adoption of the following language as Comment [1] to rule 1.1:

The duties set forth in this rule include the duty to keep abreast of the changes in the law and its practice, including the benefits and risks associated with relevant technology.

The motion was approved (13 yes, 0 no, 3 abstain).

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.

D. Considerations of Staff Recommendations

1. Discussion of Survey

The Chair recognized Mr. Difuntorum who gave an oral report on the anticipated survey process. Following discussion by the Task Force, Prof. Mohr, Ms. Mendoza, and Mr. Rodriguez volunteered to assist in the formulation of the questions for the survey.

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>.