



The State Bar of California

CLOSING THE JUSTICE GAP WORKING GROUP ACTION SUMMARY

Friday, February 19, 2021
10:00 am – 4:30 pm

Teleconference

The State Bar of California

Questions regarding any agenda item should be directed to the Committee Coordinator, Lauren McCurdy at 415-538-2107 or Chair, Justice Alison Tucher at 415-538-2116. Committee members are requested to notify the Committee Coordinator as early as possible in advance of the meeting if they wish to remove any item/s from the consent agenda.

Committee Members Present: Marta Alcumbrac, Reem Allos, Merri Baldwin, Judge Wendy Chang, David Engstrom, Bridget Gramme, Thomas Greene, Daniel Grunfeld, Eric Helland, Khathy Hoang, Micha Liberty, John Lund, Kevin Mohr, Crispin Passmore, Toby Rothschild, Rebecca Sandefur, James Sandman, and Patricia Squitiero.

Committee Members Not Present: Ruby Marquez.

Others Present: Neal Gupta, Greg Fortescue, Donna Hershkowitz, Randall Difuntorum, Mimi Lee, Andrew Tuft, Angela Marlaud, Lauren McCurdy, Melanie Lawrence, Mia Ellis, and Brady Dewar.

The order of business is approximate and subject to change.

Members of the public may access this meeting as follows:

Zoom Link: <https://calbar.zoom.us/j/91964339170>

Call-In Number: 1-669-900-9128

Webinar ID: 919 6433 9170

OPEN SESSION

I. CHAIR'S REPORT

A. Roll Call

B. Public Comment

Charles Gillig and Stephanie Bond provided public comment.

- C. Announcements
Staff reported that the Supreme Court issued an order on February 18, 2021 approving amendments to California Rules of Professional Conduct 1.1 and 5.4 to become operative March 22, 2021 (Supreme Court case number S266066).
- D. Staff Report - Assignments Process and Workplan
Mr. Difuntorum reported that we will be utilizing One Drive to share articles and resources within the Working Group, however, if you have a significant article that you would like circulated or included with the agenda materials, you can inform staff in an email. Additionally, staff has developed a reading syllabus with relevant articles and publications that the working group can use to educate themselves during the course of the working group's work. It was also reported that the subcommittees will hold subcommittee meetings between the working group meeting dates. A schedule for the subcommittee meetings will be finalized and circulated.
- E. Approval of Open Session Action Summary from the January 14, 2021 Meeting
Open session action summary was unanimously approved as amended (16-0-0).

II. Business

- A. Presentation: Concrete Examples of What Forms of Legal Services are being Offered in Non-California Jurisdictions and the Regulatory Safeguards that Accompany these Legal Services
Mr. Passmore (presenter) gave an oral report on the various types of legal services being offered and alternative business structures in the UK and the regulatory safeguards that have been established.
- B. Consideration of Recommendations from the Scope Subcommittee on the Scope of a Regulatory Sandbox
The Chair recognized Ms. Sandefur and Mr. Greene who led a discussion on the issues raised by the Scope subcommittee.
- C. Presentation: The California Paraprofessional Program Working Group
Ms. Wilson and Justice Petrou gave a presentation on the work of the California Paraprofessional Program Working Group's initiative, proposals, and timeline.
- D. Consideration of Recommendations from the SAGE Subcommittee on the Structure and Governance of a Regulatory Sandbox
The Chair recognized Ms. Baldwin and Mr. Lund who led a discussion on the issues raised by the SAGE subcommittee.

- E. Discussion of Assignments for the Next Meeting
Mr. Difuntorum gave an oral report on the next steps and noted that the Scope subcommittee will receive a new assignment concerning sandbox applications and eligibility criteria issues.

CLOSED SESSION

NONE

ADJOURN

In compliance with the American with Disabilities Act, those requiring modifications or accommodations to observe and address this meeting should notify Angela Marlaud at Angela.Marlaud@calbar.ca.gov. Please provide 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>.