



# The State Bar of California

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## OPEN SESSION AGENDA ITEM 6.6 JULY 2024 BOARD OF TRUSTEES

**DATE:** July 18, 2024

**TO:** Members, Board of Trustees

**FROM:** Leah Wilson, Executive Director  
Margaret Hagan, Executive Director, Legal Design Lab, Stanford Law School

**SUBJECT:** Discussion Regarding State Bar Policy on Generative AI Use

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### EXECUTIVE SUMMARY

In November 2023, the Board of Trustees approved for publication Practical Guidance for the Use of Generative Artificial Intelligence in the Practice of Law, which addresses lawyer use of generative Artificial Intelligence (AI). At its January 2024 planning session the Board of Trustees was updated on developments in AI and legal technology. To date the Board's actions have been focused on its role as a regulator. Today's discussion will focus on the State Bar's use of generative AI within its own operations. Trustee Toney has asked that the Board consider adopting a policy governing that use; the Board will participate in a facilitated discussion led by [Margaret Hagan](#), the Executive Director of the Legal Design Lab at Stanford Law School, and review both current interim and draft updated State Bar AI use guidelines, to support its consideration of a Board-adopted policy.

### RECOMMENDED ACTION

None

### DISCUSSION

Generative Artificial Intelligence has the potential to reshape State Bar operations, enabling efficiencies that will be particularly important as the organization reduces its headcount in light of the 2025 fee bill. Identification of internal AI use cases and appropriate vendors and products for addressing those use cases, and product testing and implementation, have been underway at the State Bar for several months. These efforts have been challenged by a number of factors including lack of expert and dedicated staff to assign to this work and an ever-evolving AI

technological and security landscape. Dedicated resources and institutionalization of efforts to appropriately and effectively deploy AI within the State Bar are needed. A comprehensive State Bar AI use policy is foundational to the institutionalization that needs to occur.

Ms. Hagan will facilitate a discussion to solicit Board input about potential State Bar use cases that have been identified by staff. The attached article, *Opportunities & Risks for AI, Legal Help, and Access to Justice*, provides the Board with a sense of the inquiry process that Ms. Hagan will engage in with the Board. This discussion will support the Board's consideration of key components of a future Board-adopted State Bar AI use policy.

## **PREVIOUS ACTION**

- [Board November 2023 Agenda Item](#)
- Board January 2024 Agenda Item Regarding Artificial Intelligence Overview and Training

## **FISCAL/PERSONNEL IMPACT**

None

## **AMENDMENTS TO RULES**

None

## **AMENDMENTS TO BOARD OF TRUSTEES POLICY MANUAL**

None

## **STRATEGIC PLAN GOALS & IMPLEMENTATION STEPS**

None – core business operations

## **RESOLUTIONS**

None

## **ATTACHMENT LIST**

- A. Margaret Hagan Article
- B. State Bar Current Interim AI Use Policy
- C. Draft Updated Use Policy