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4.1 Discussion Regarding the *Scaling Access to Justice: A Legal Tech Blueprint* Report

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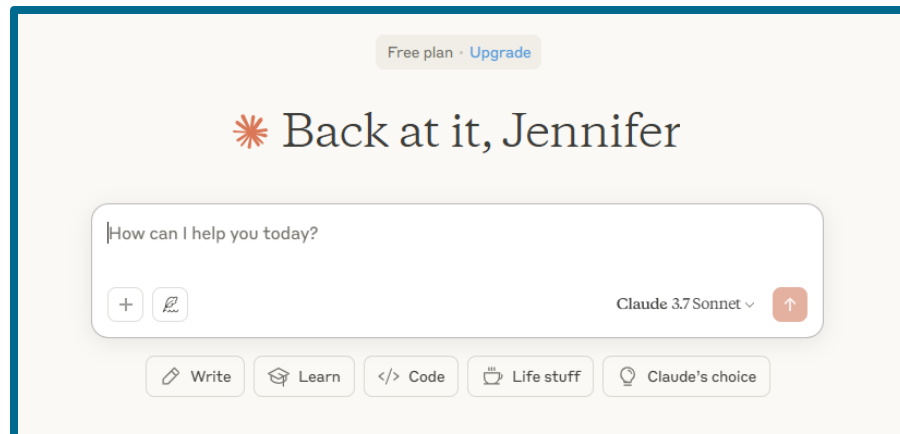
PDI Committee Meeting, May 6, 2025

Agenda

- Background: Legal technology and AI
- Connecting legal technology and generative AI to access to justice
- Grantee requests for legal tech. support
- OA&I's major legal tech. and GenAI initiatives
- The Strategic Legal Tech. Initiative
- Discussion Questions
- Next steps
- Question and answer

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Background: Legal Technology and AI

- Legal technology is any tool that makes legal work more efficient (e.g., a case management system or a grants management platform).

- Artificial Intelligence (AI) refers to different technologies that are designed to mimic human intelligence.

- Generative AI (GenAI) is a subtype of AI where the tool generates content (e.g., a chatbot).

- Some GenAI tools are considered general use (e.g., ChatGPT, Claude, and Gemini) and rely on large datasets so that users can work with the same chatbot for many types of queries.
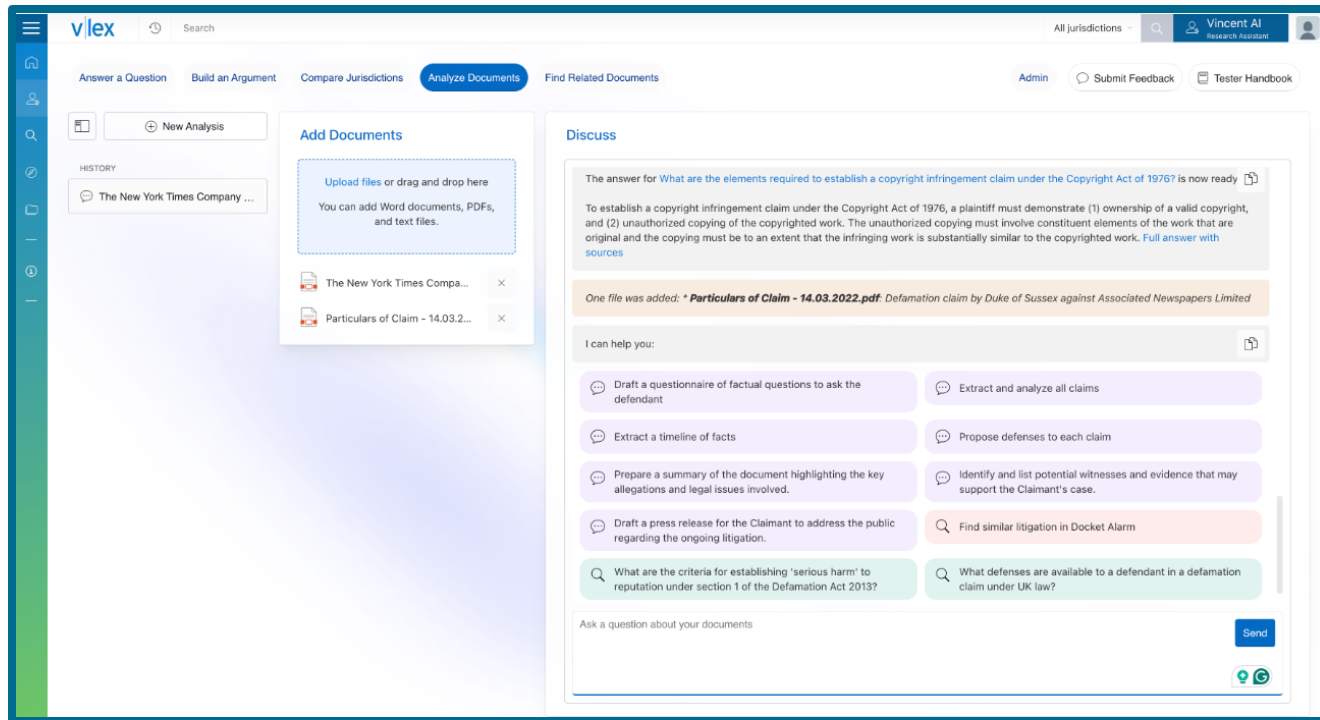
Free plan · Upgrade

✳ Back at it, Jennifer

How can I help you today?

+   ✒   Claude 3.7 Sonnet ∨   ↑

✏ Write   🎓 Learn   </> Code   ☕ Life stuff   💡 Claude's choice

This is an image of Claude's interface.

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Background: Legal Technology and AI

- Other GenAI tools are specialized for a specific industry, task, or knowledge base. Examples of legal-specific tools are vLex's Vincent, CoCounsel, Lexis+ AI, and WestLaw Precision.

This is an image of Vincent's user interface, from vLex's website.

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- The 2019 California Justice Gap Study found that Californians received no or inadequate help for 85 percent of their civil legal problems.

- The LSTFC's mission is to close the justice gap in California by increasing equitable access to legal services for low-income and underserved communities.

- The private bar already uses legal technology and GenAI to increase its efficiency. If legal aid does not adopt these tools, the gap between the services and resources available to those who can afford an attorney versus those who cannot afford private legal help may continue to grow.

- By responsibly deploying legal technology including GenAI, legal aid could potentially serve more Californians and help shrink California's justice gap.

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Grantee Requests for Legal Tech. Support

- 58 (over 50 percent of) grantees responded to the Legal Tech and GenAI Survey for State Bar Grantees—in October 2024.

- The survey demonstrated that grantees want more support to learn and use legal technology and GenAI. Specifically, most respondents:
  - Believe GenAI could effectively help them to review and manage documents; research the law; analyze and report data; manage and track cases; translate documents; and schedule.
  - Believe that GenAI will lead to improved workflows and efficiencies.
  - Asked for training and support.

- Individual grantees also expressed interest in GenAI directly to staff and during the March 2025 Convenings to Protect Californians in 2025 and Beyond.

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OA&I's Major Legal Tech and GenAI Initiatives

October 2023 Emerging Trends to Expand
Access to Justice Convening

CoCounsel

2023

vLex

current

CoCounsel's AI for Justice Legal Innovators Program

Everlaw for Good

Thought partnership with Stanford Law School Legal Design Lab

Legal Ops, Tech, and AI RFP

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Strategic Legal Tech Initiative

State Bar of California   May 6, 2025

Our Objective

Empowering grantees to understand and safely deploy cutting-edge technology to enhance service delivery, streamline operations, and expand access to justice

Agenda

Approach | 01

Findings | 02

Recommendations | 03

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Approach

Methodology

Preparation and Contextual Review

- GenAI Grantee Survey, Oct 2024
- Engagement with OA&I leadership and prior initiatives
- Leverage broader technological expertise

Data Collection & Engagement

- Refining interview questions based on prior research
- Targeted interviews with grantees
- Comparative analysis & identifying trends and gaps

Synthesis & Analysis

- Triangulation of findings
- Defining future state and prioritizing opportunities
- Developing implementation framework & sustainability plan

Validating Recommendations

- Detailed report
- Virtual summaries
- Live polling with subset of grantees
- Collating & analyzing responses
- Refining recommendations and report

Roadmap Development

- Identify & prioritize opportunities
- Centralize strategic leadership & resources
- Develop sustainable strategy
- Facilitate implementation
- Training & long-term sustainability

Data collection

Strength of insights

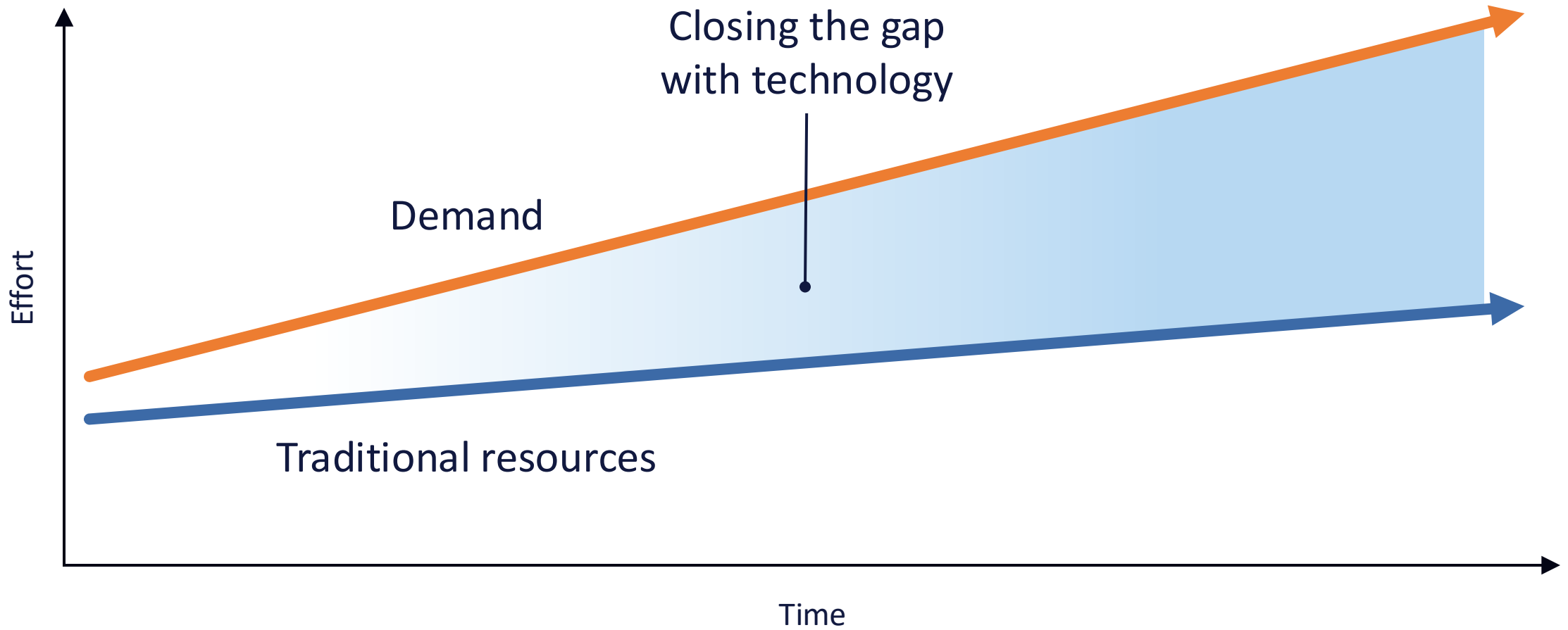# Designing Strategy to Fit Different Archetypes

We recognize that the State Bar grantee organizations are not the same size, shape and makeup. Throughout this process our recommendations have been generalized and validated for fit and application with four archetypes of organizations.

Small QLSP [1]	Small – Medium QLSP & LSCP [2]	Large QLSP	Support Center
Archetype 1	Archetype 2	Archetype 3	Archetype 4

▪ ~15–20 FTEs	▪ ~25+ FTEs	▪ ~100+ FTEs	▪ <15 FTEs
▪ <$200K core funding	▪ $200K–550K core funding	▪ >$1.5M core funding	▪ $200K–550K core funding
▪ 1 demographic group	▪ 1–2 offices/clinics	▪ Multiple offices/clinics	▪ Fully remote
▪ 1 office	▪ 1–2 counties	▪ Multiple counties	▪ Statewide
▪ 1 county	▪ Pro bono and/or student volunteers	▪ Pro bono	▪ Pro bono
▪ No pro bono			

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1. QLSP – "Qualified Legal Services Project"
2. LSCP – "Law School Clinical Program"

Findings

Macro View of Opportunity
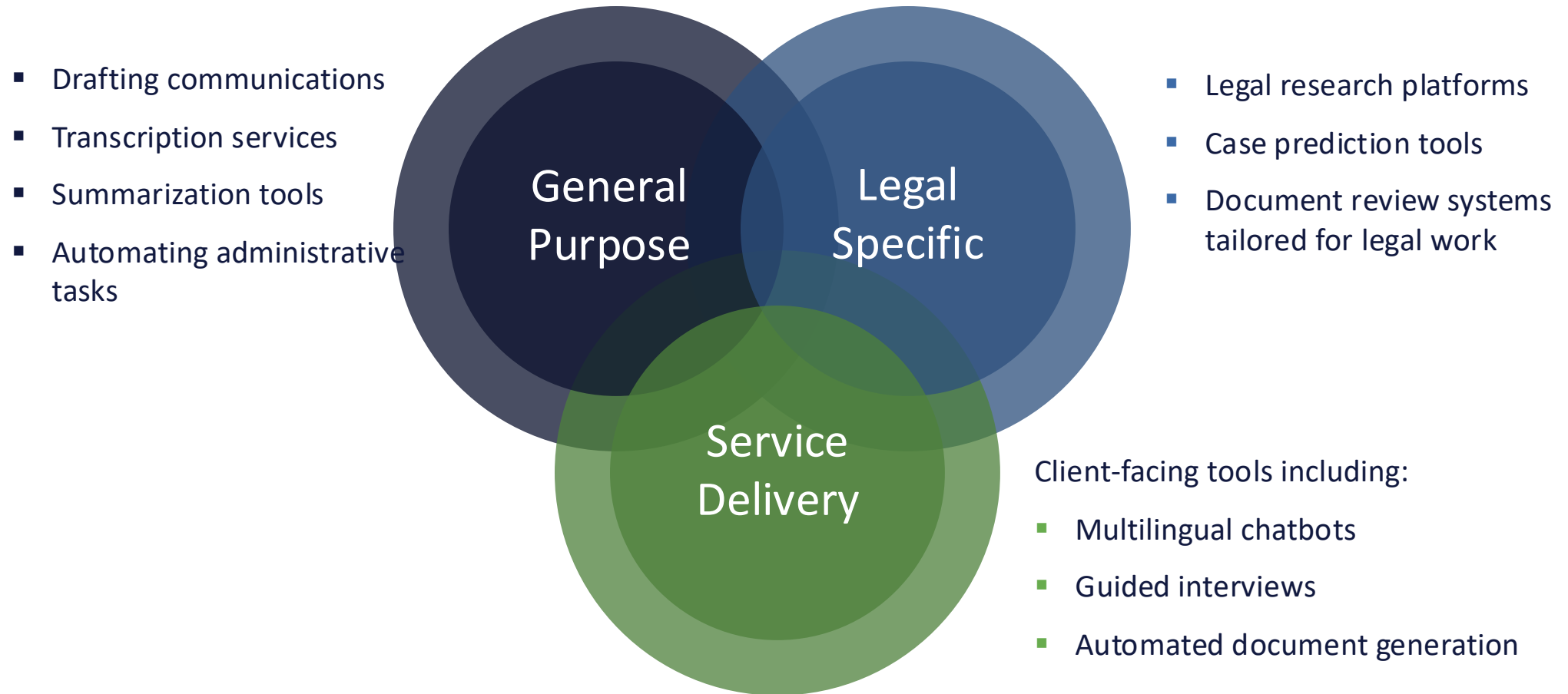
AI as Transformative Force Multiplier

- Reduce administrative burdens
- Increase speed and consistency of information delivery
- Process massive amounts of information quickly
- Provide expedient summarization and analysis
- Facilitate real time language translation
- Support scalable self-help resources

- Enables Orgs to serve more clients
- Enables legal professionals to focus on complex client needs

Key Areas of Focus

- Drafting communications
- Transcription services
- Summarization tools
- Automating administrative tasks

General Purpose

Legal Specific

Service Delivery

- Legal research platforms
- Case prediction tools
- Document review systems tailored for legal work

Client-facing tools including:

- Multilingual chatbots
- Guided interviews
- Automated document generation

Priority Areas and Common Needs

Document prep and review (with automation)

Client communication and follow-up (admin)

Intake, triage, and screening

Admin – scheduling, data entry, case mgmt., and reporting

Cross-system integration

Knowledge Management tools

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Overview of Outcomes

Enablement & efficiency

- Process higher volumes of similar cases
- Better leverage limited pro bono resources
- Improve consistency in service delivery
- Data-driven insights
- Reduce costs associated with repetitive tasks

Enhancing legal expertise

- Enhancing human capabilities, not replacing judgment
- Significantly reducing administrative burdens that divert resources from client service

Responsible innovation

- Aligned with actual needs of grantees and their clients
- Appropriate safeguards for data security and privacy
- Ethical frameworks that prevent algorithmic bias
- Sustainable adoption strategies that build organizational capacity

Coordinated strategic support from the State Bar which is uniquely positioned to help grantees

Top Barriers and Concerns

Barriers to Implementation

$ Funding structure limitations

Capacity & staffing constraints

Change management challenges

Client-side digital divide

Concerns and Priorities for AI Implementation

Data security & privacy
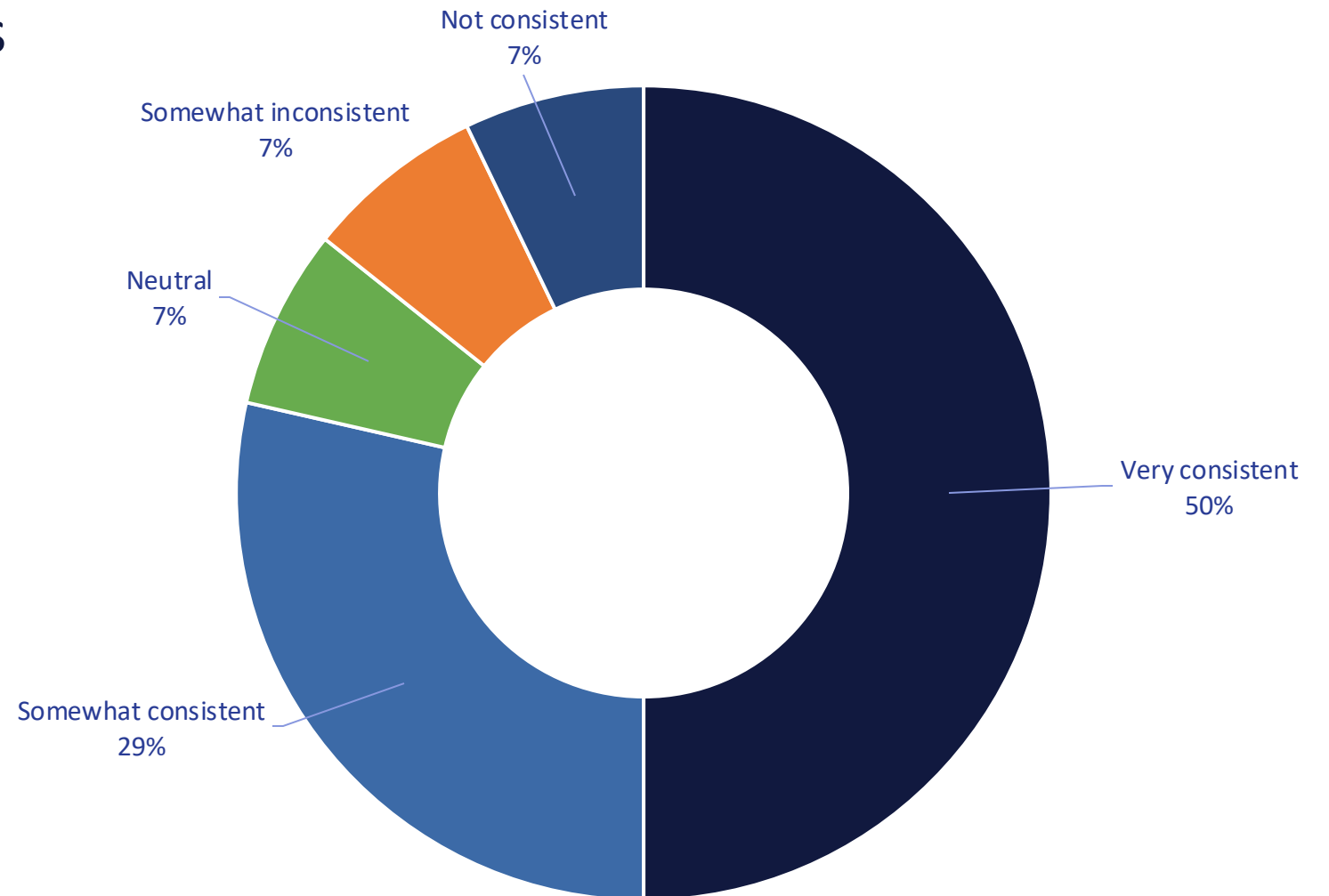
$ Cost

Accuracy

Ease of use

Ethical considerations (e.g., UPL)

April 4 Grantee Poll Results

Do these findings seem consistent with your organization's perspective?

Not consistent 7%

Somewhat inconsistent 7%

Neutral 7%

Very consistent 50%

Somewhat consistent 29%

Recommendations

Overview: 14 Recommendations in 7 Areas

OA&I Structure and Governance

AI Models & Frameworks

Key Supplier Network

Resource & Network Sharing

People Resources & Training

Future Innovation Systems

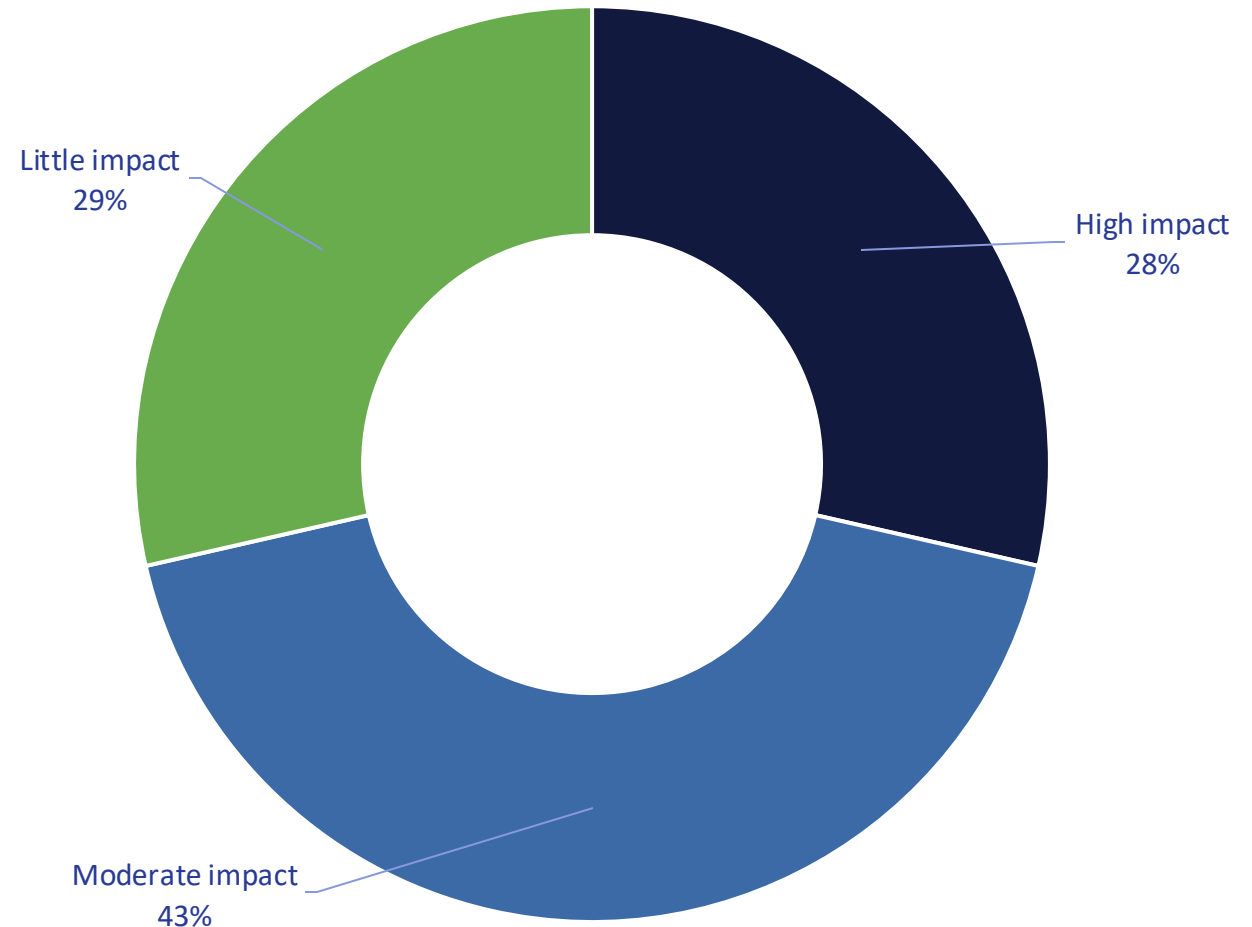Tech-Enabled Pro Bono Engagement

OA&I Structure and Governance

OA&I Structure and Governance	
AI Models & Frameworks	
Key Supplier Network	
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People Resources & Training	
Future Innovation Systems	
Tech-Enabled Pro Bono Engagement	

Invest in Centralized Strategic Leadership

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- Hire a centralized strategic leader to coordinate collective resource development
- Targeted group enhancement and support of the collective
- Tailored individual support through office hours, lightweight consulting, etc.

Establish Governance Structure

OA&I

- Establishment of a Legal Technology Advisory working group
- Guidance and review of strategic technology roadmap
- Clear direction and accountability channels

April 4 Grantee Poll Results

OA&I Structure and Governance

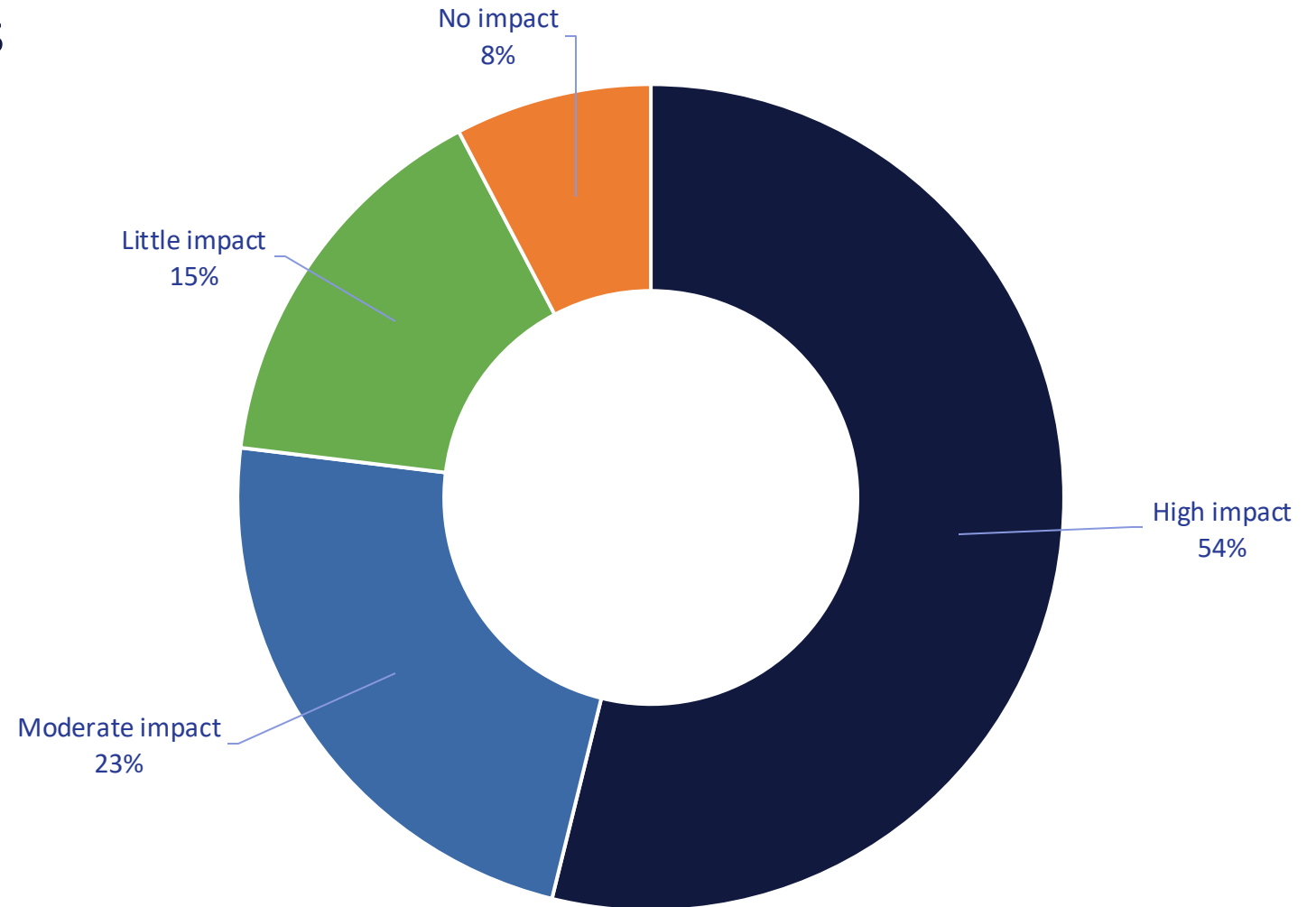What is the estimated impact on your organization if these recommendations are implemented?

Little impact
29%

High impact
28%

Moderate impact
43%

AI Models & Frameworks

OA&I Structure and Governance	**Establish an AI x A2J Maturity Model** *OA&I*	▪ Diagnostic Assessment Tool to provide clear visualization of organizations' technology maturity profile and identify strengths, gaps, and readiness factors for AI implementation ▪ Stage-Specific Implementation Toolkit with actionable recommendations and supporting resources such as implementation roadmaps
AI Models & Frameworks		
Key Supplier Network	**Develop AI Risk Management Framework** *OA&I with Legal Ethics and AI Subject Matter Experts*	▪ Comprehensive framework for responsibly implementing & managing AI tech ▪ Respond to a clear need for guidance, policies, and consideration of potential implications in exploring AI technologies ▪ Duty-based guidance, risk assessment methodologies, documented approaches, and educational resources
Resource & Network Sharing		
People Resources & Training	**Establish Mapping and Measures Model** *OA&I with Mission Advancement & Accountability Division (MAAD) Support*	▪ Framework for measuring impact of technology investments on access to justice outcomes ▪ Empowers grantees to diagnose specific needs within different practice contexts and select appropriate solutions ▪ Standardized metrics for operational efficiency and client impact, data collection protocols that minimize burden on grantees, and practical evaluation tools for technology selection criteria and risk assessments
Future Innovation Systems		
Tech-Enabled Pro Bono Engagement		

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April 4 Grantee Poll Results

AI Models & Frameworks

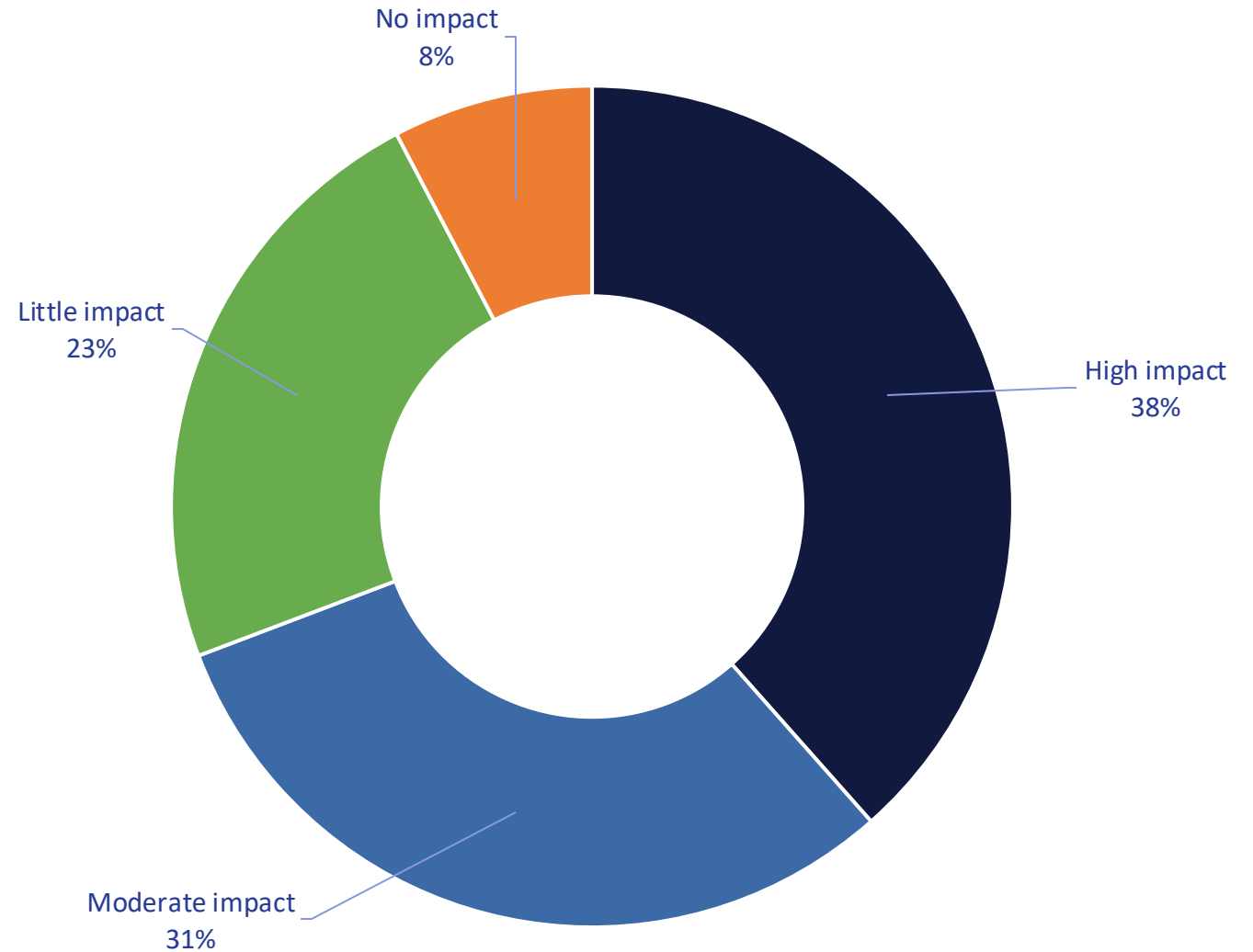What is the estimated impact on your organization if these recommendations are implemented?

No impact
8%

Little impact
15%

High impact
54%

Moderate impact
23%

Key Supplier Network

OA&I Structure and Governance

AI Models & Frameworks

Key Supplier Network

Resource & Network Sharing

People Resources & Training

Future Innovation Systems

Tech-Enabled Pro Bono Engagement

Engage Key Supplier Network

OA&I with Procurement Specialists

- Strategic partnerships with key technology suppliers
- Opportunities for collaborative procurement, customized grantee solutions, preferential pricing models
- Emphasis on rigorous security vetting and effectiveness evaluation of vendors and partners
- Structured feedback channels between grantees and suppliers

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April 4 Grantee Poll Results

Key Supplier Network

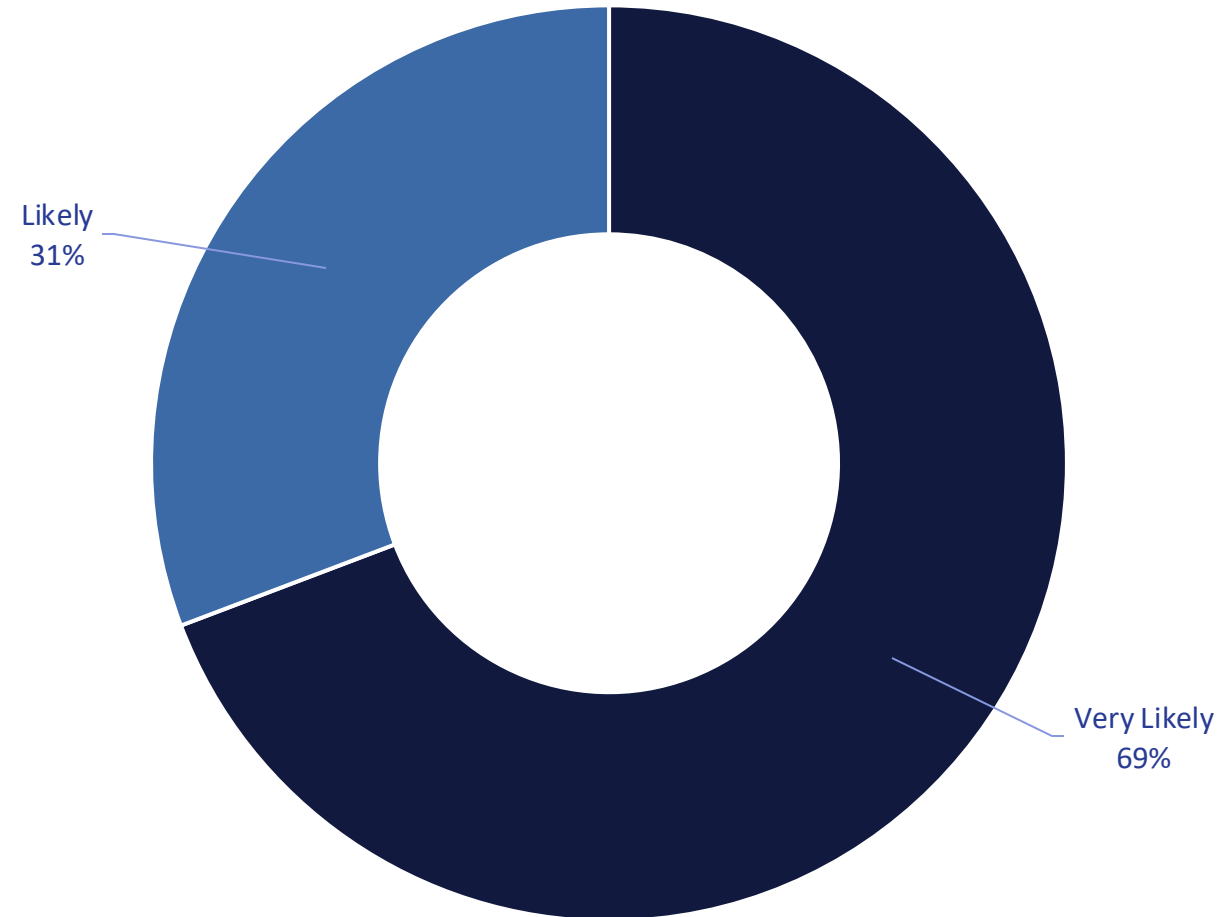What is the estimated impact on your organization if these recommendations are implemented?

No impact
8%

Little impact
23%

High impact
38%

Moderate impact
31%

Resource & Network Sharing

OA&I Structure and Governance	**Establish a Resource Sharing Platform** *OA&I*	▪ Centralized resource-sharing platform for templates, training materials, process, documentation, and technical resources
AI Models & Frameworks		▪ Response to identified pain point of resource duplication resulting in drain of resources
Key Supplier Network	**Establish a Champion Network** *OA&I with designated grantee leads*	▪ Network of technology champions across organizations to create a sustainable ecosystem
Resource & Network Sharing		▪ Enable and encourage knowledge sharing, peer support, problem solving, and advocacy for technology adoption
People Resources & Training		▪ Identify and empower individuals within grantee organizations who demonstrate aptitude and enthusiasm for technology innovation
Future Innovation Systems	**Establish Community of Practice Development** *OA&I*	▪ Community of Practice will facilitate collaborative learning environment
		▪ Structured peer-learning opportunities for knowledge sharing, collaborative problem-solving, mentorship, and innovation sharing
Tech-Enabled Pro Bono Engagement		▪ Evolving knowledge base that survives staff turnover and preserves institutional learning

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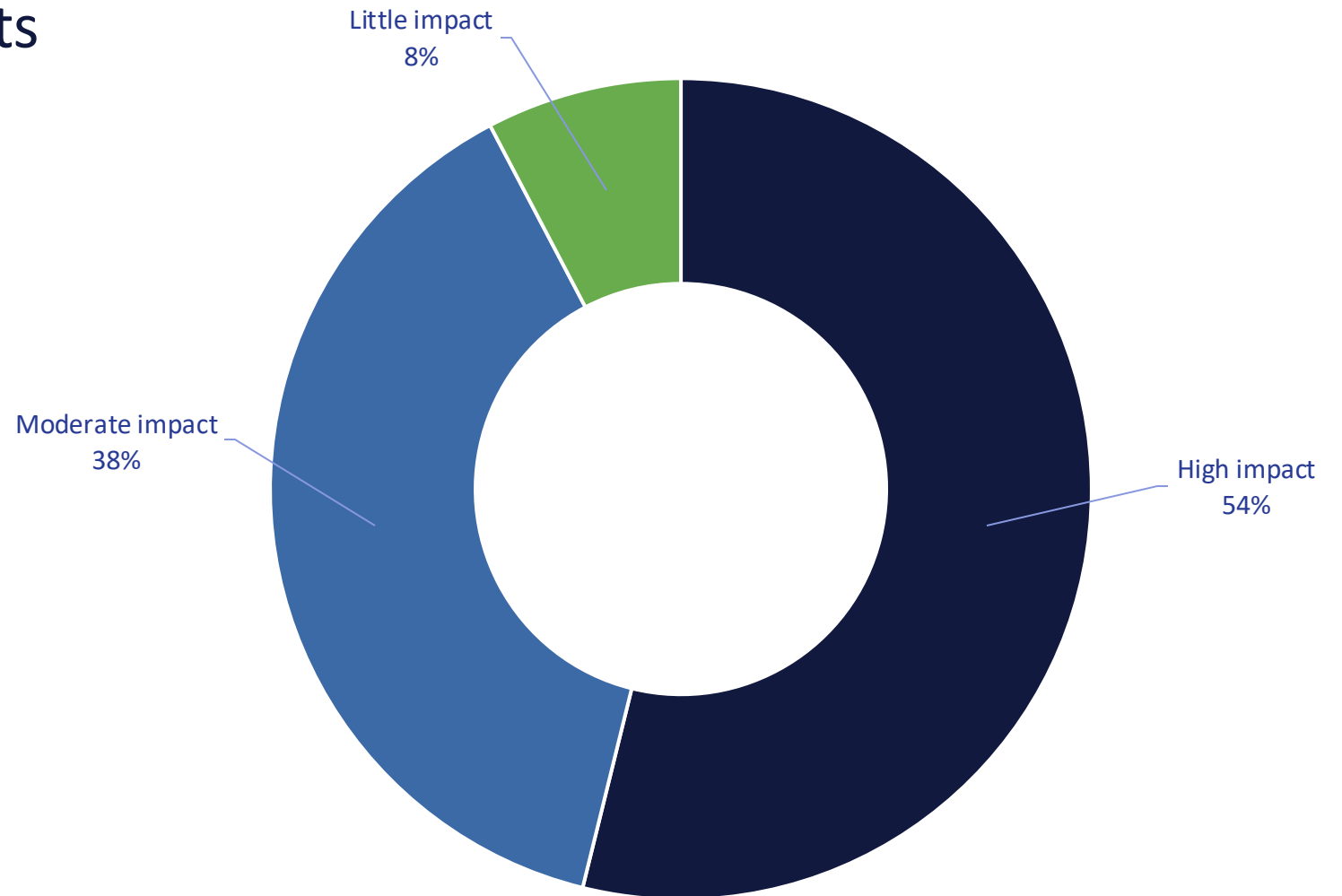# April 4 Grantee Poll Results

Resource & Network Sharing

How likely is your organization to participate in at least one of these initiatives?

Likely
31%

Very Likely
69%

April 4 Grantee Poll Results

Resource & Network Sharing

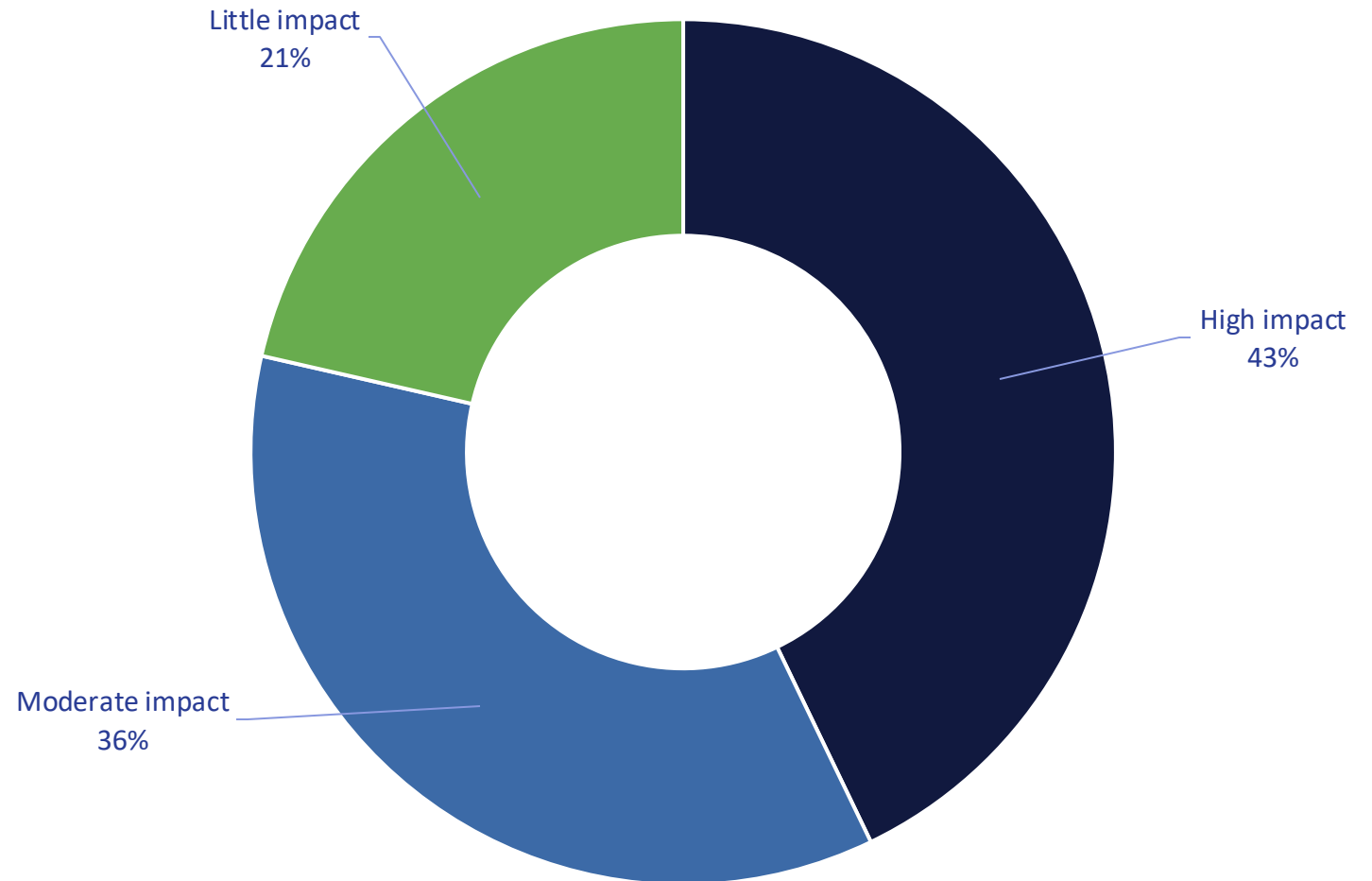What is the estimated impact on your organization if these recommendations are implemented?

Little impact
8%

Moderate impact
38%

High impact
54%

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People Resources & Training

OA&I Structure and Governance	
AI Models & Frameworks	
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Future Innovation Systems	
Tech-Enabled Pro Bono Engagement	

Develop Training and Capacity Building Framework

OA&I with Education Partners

- Framework that coordinates existing resources and creates targeted supplements to skill gaps
- Organization of role-specific learning resources, connecting resources with appropriate training options
- Curate relevant existing materials to share best practices and provide peer support

Develop Role-Based Technology Adoption Plans

OA&I

- Targeted technology adoption strategies for key roles within grantees (e.g., executive leadership, staff attorneys, paralegals and support staff, client-facing navigators)
- Increased adoption rates and maximized impact of technology use

April 4 Grantee Poll Results

People Resources & Training

What is the estimated impact on your organization if these recommendations are implemented?

Little impact
21%

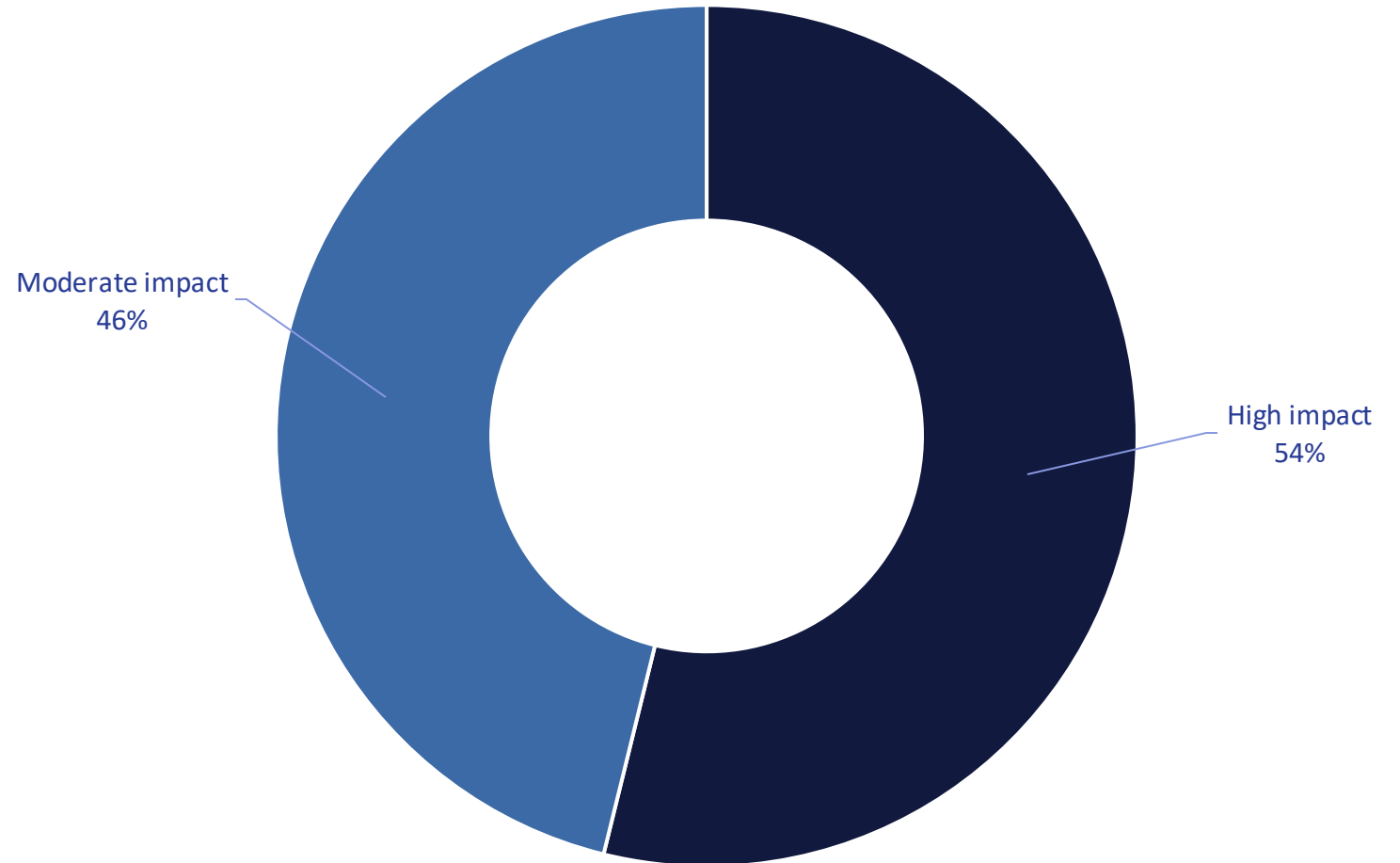High impact
43%

Moderate impact
36%

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Future Innovation Systems

OA&I Structure and Governance	
AI Models & Frameworks	
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Future Innovation Systems	
Tech-Enabled Pro Bono Engagement	

Foster Simple Data Sharing and System Connections

OA&I with Technical Specialists and vendors

- Toolkit of simple integration methods that organizations with limited technical resources can implement
- Standardized spreadsheet formats, secure file-sharing protocols, templates for data-sharing agreements
- Pragmatic solutions for identifying common data elements across existing systems, establishing consistent naming conventions, creating simple export/import processes between tools

Support Sustainable Innovation Ecosystem

OA&I with Legal Tech Advisory working group

- Integrated impact measurement to develop standardized metrics of technology adoption
- Cross-organizational learning systems for sharing successes and challenges
- Community-driven innovation pipeline to identify emerging needs, evaluate potential solutions collectively, and scale pilots across organizations
- Distributed maintenance model of common resources
- Lightweight integration standards for connecting disparate systems without requiring enterprise-level integration capabilities
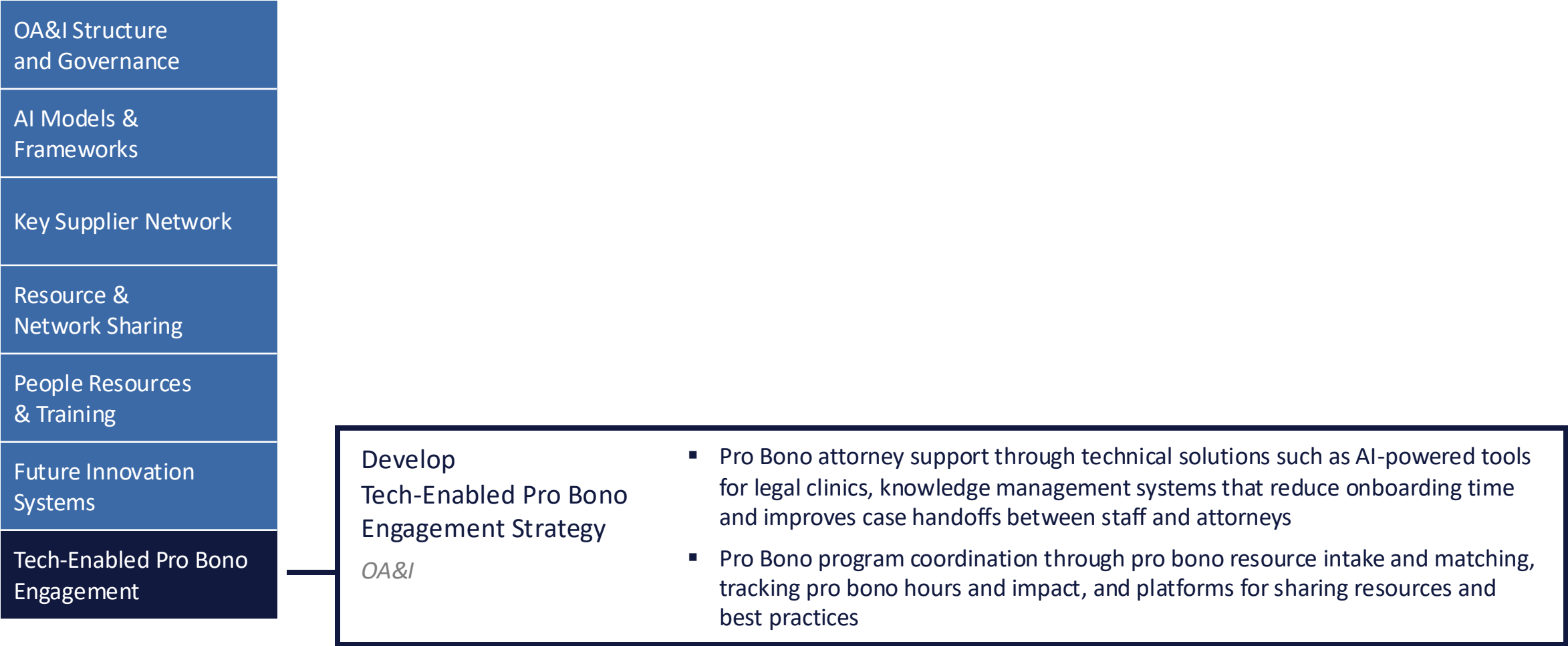- Continuous recalibration process to identify shifting needs and emerging technologies

April 4 Grantee Poll Results

Future Innovation Systems

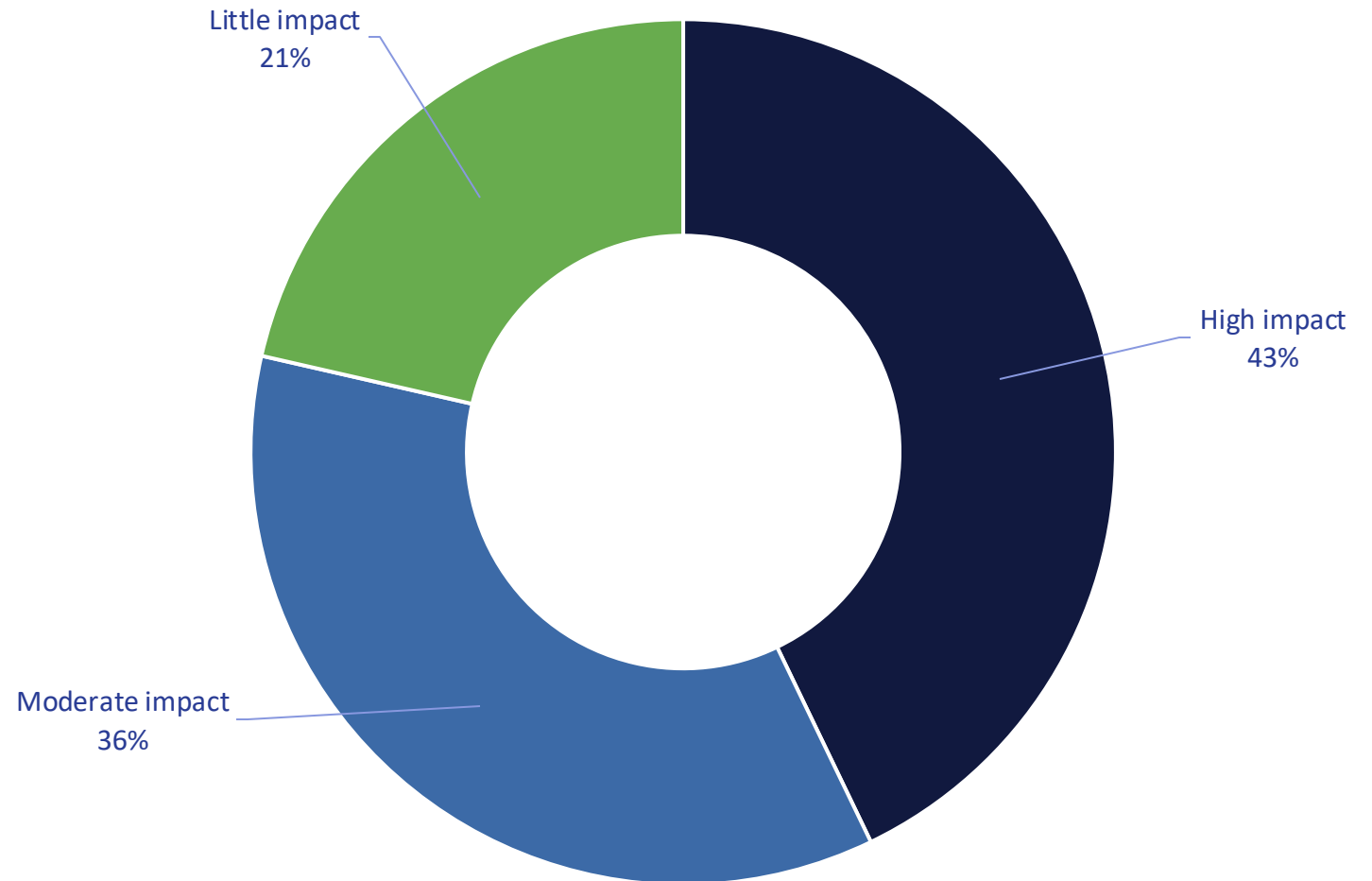What is the estimated impact on your organization if these recommendations are implemented?

Moderate impact
46%

High impact
54%

Tech-Enabled Pro Bono Engagement

OA&I Structure and Governance
AI Models & Frameworks
Key Supplier Network
Resource & Network Sharing
People Resources & Training
Future Innovation Systems
Tech-Enabled Pro Bono Engagement

Develop Tech-Enabled Pro Bono Engagement Strategy

OA&I

- Pro Bono attorney support through technical solutions such as AI-powered tools for legal clinics, knowledge management systems that reduce onboarding time and improves case handoffs between staff and attorneys

- Pro Bono program coordination through pro bono resource intake and matching, tracking pro bono hours and impact, and platforms for sharing resources and best practices

April 4 Grantee Poll Results

Tech-Enabled Pro Bono Engagement

What is the estimated impact on your organization if these recommendations are implemented?

Little impact
21%

High impact
43%

Moderate impact
36%

April 4 Grantee Poll Results

How would you prioritize these six areas of recommendations?

| AI Models & Frameworks |
| Key Supplier Network |
| Resource & Network Sharing |
| People Resources & Training |
| Future Innovation Systems |
| Tech-Enabled Pro Bono Engagement |

1	2	3	4
No impact	Little impact	Moderate impact	High impact

April 4 Grantee Poll Results

How would you prioritize these six areas of recommendations?

Recommendation Areas in Order of Aggregate Prioritization	Ranked 1st	Ranked 2nd	Ranked 3rd	Ranked 4th	Ranked 5th	Ranked 6th
People Resources & Training	3	7	2	1	1	0
AI Models & Frameworks	7	1	1	1	1	3
Resource Network & Sharing	1	3	6	1	3	0
Future Innovation Systems	2	2	1	7	2	0
Tech-Enabled Pro Bono Engagement	1	1	2	1	2	7
Key Supplier Network	0	0	2	3	5	4

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Methodology

Preparation and Contextual Review

- GenAI Grantee Survey, Oct 2024
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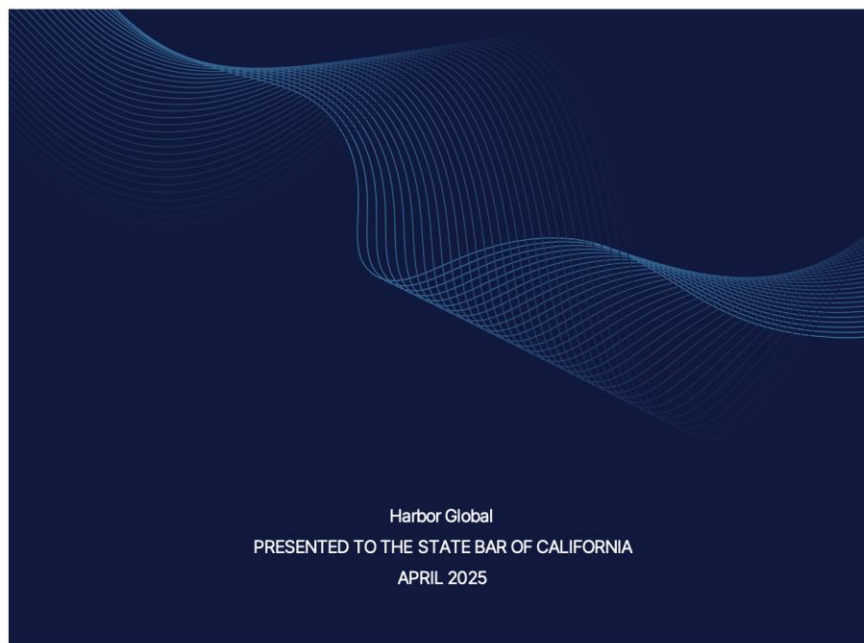- Training & long-term sustainability

Data collection

Strength of insights

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Next Steps
and Discussion

Discussion Questions

- What is your initial reaction to these recommendations?

- Which recommendations resonate the most?

- How would you prioritize these recommendations?

- Is anything missing from these recommendations?

Next Steps

- Form a working group with commissioners from the PDI Committee, grantees, and external experts;

- Begin exploring the Technology Transformation Lead hiring process;

- Facilitate monthly grantee legal tech workshops; and

- Explore additional pilot and collaboration opportunities.

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Question and Answer

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Thank you!

For more information about the State Bar's Legal Technology Initiative, please contact Jennifer Zelnick, Lead Program Analyst, at jennifer.zelnick@calbar.ca.gov.

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