

1.3 Discuss Program Development and Impact Committee Priorities for 2025



The State Bar of California

1.3 PDI Committee Priorities: Supporting Grantees in a Rapidly Changing Policy Landscape

Sylvia Nam, Senior Program Analyst, Office of Access & Inclusion

PDI Committee, February 7, 2025

Survey Background

- In November 2024, the State Bar identified the need for a series of touchpoints in anticipation of a changing federal policy landscape and its impact on legal aid practitioners and Californians more broadly.
- Around this time, the special legislative session included the opportunity for additional Equal Access Fund (EAF) grant dollars.
- In December 2024, the State Bar convened two focus groups with grantees from thirty organizations that provide immigration legal services.
- In January 2025, the fires in Southern California posed new challenges for California families and needs for disaster legal assistance.
- The survey's overall goal is to support LSTFC grantees as they navigate the federal policy landscape and disaster legal needs.



Goal: To Refine and Enhance Grantee Support



Services and Inquiries



Anticipated Policy Impacts



Preparation and Planning



Strategy and Support



Sample Survey Question

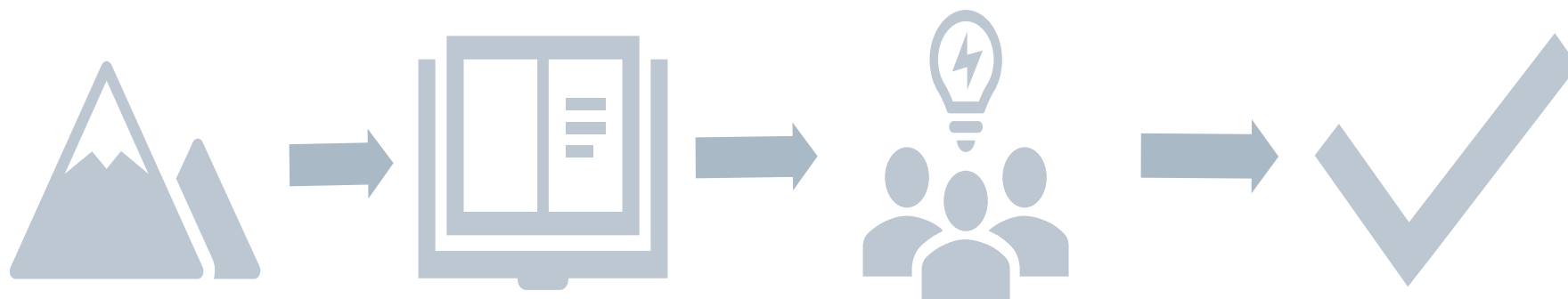
Given potential policy changes, rank your organization's top three concerns.

Options:

- Case load
- Budget
- Funding and fundraising
- Staffing
- Recruitment and retention



Next Steps



Survey closed
on February 5

Share
preliminary
findings during
virtual
roundtable on
February 10

Incorporate
grantee
feedback for
further analysis

Present refined
findings during
in-person
convenings in
March





Questions

1. What are actionable next steps the PDI Committee would like to see in how the survey data is used?
2. How might these next steps help inform the committee's immediate, medium, and/or long-term goals for this area of work?



Thank you!

For questions or to share additional information, please contact:
Sylvia Nam, Senior Program Analyst, sylvia.nam@calbar.ca.gov.



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1.3 Discuss Program Development and Impact Committee Priorities for 2025: Toward a Legal Technology Initiative for LSTFC Grantees

Jennifer Zelnick, Lead Program Analyst, Office of Access & Inclusion

PDI Committee, February 7, 2025

Connecting Legal Tech and Generative Artificial Intelligence to Access to Justice

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.

As legal technology and generative Artificial Intelligence (GenAI) proliferate in the private bar, the gap between services and resources available for those who can afford attorneys versus those who cannot afford private legal help may continue to grow.

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



OA&I's Major Legal Tech and Generative AI Initiatives





HARNESSING EMERGING TRENDS TO EXPAND ACCESS TO JUSTICE

Registration

9:00 A.M. – 10:00 A.M.

Opening Remarks

10:00 a.m. – 10:10 a.m.

Keynote Speaker

10:10 a.m. – 10:20 a.m.

Justice Kelli M. Evans, Associate Justice, California Supreme Court

Foundations in Legal Tech

10:30 a.m.-11:00 a.m.

Miriam Kim, Partner; and Shannon Bales, Litigation Support Manager; of Munger, Tolles & Olson, will review foundational concepts and new developments in legal technology. Through brief demonstrations of currently available products, they will model how legal aid organizations can incorporate these tools into practice.

Legal Technology and Ethics

11:00 a.m.-12:00 p.m.

This panel will reframe conversations about legal tech and AI as potential tools to help legal aid organizations address California's justice gap. Panelists will provide insight into ways legal service providers can harness these tools to enhance service delivery and increase capacity, while considering ethical standards.



Pilots and Other Tech Collaborations

CoCounsel

2023

vLex

current

CoCounsel's AI for
Justice Legal
Innovators Program

Everlaw for Good



**Thought partnership with
Stanford Law School Legal Design Lab**





The State Bar *of California*

OFFICE OF GENERAL SERVICES

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REQUEST FOR PROPOSAL

This document is a Request for Proposal ("RFP") for a legal operations, technology, and artificial intelligence (AI) consultant ("services").

The State Bar of California ("the State Bar") seeks proposals from consultants or subject matter experts to conduct assessments of and generate recommendations for legal operations and legal technology for: 1) the State Bar; and 2) nonprofit legal aid organizations.

The Initial Term, with Renewal Period(s), if elected, means the **Term**. The State Bar expects to award a contract based on this RFP on or before **September 4, 2024**, for the Initial Term to commence on or around **October 1, 2024**.

Please submit an electronic copy of your proposal to Sunly.Yap@calbar.ca.gov no later than **3:00 p.m. on August 20, 2024** ("Submission Deadline"). Bidders will receive a confirmation email notifying them of receipt. If bidders do not receive such email, please follow up with Sunly Yap.





Discussion Questions

- What would the PDI Committee recommend staff prioritize/consider while designing the statewide Legal Tech Initiative?
- Would the PDI Committee be interested in supporting (e.g., advising) the development of a statewide Legal Tech Initiative?



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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1.3 Discuss PDI Committee Priorities for 2025: Reporting Framework

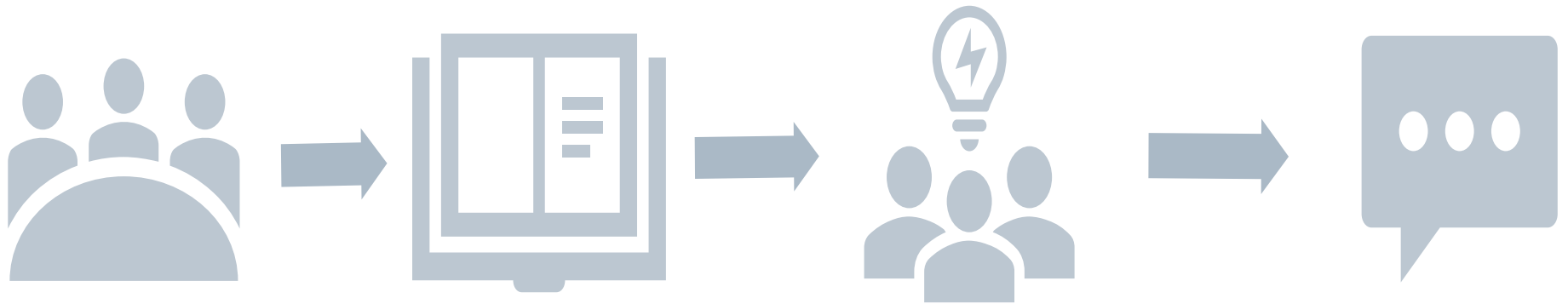
Christal Bundang, Principal Program Analyst, Office of Access & Inclusion

PDI Committee, February 7, 2025

Explore ways to refine the LSTFC's reporting framework to reduce burdens on grantees, support transparency and mutual accountability, and promote impactful communications with stakeholders.

- Analyze legal aid data collected over the past five years and report summary findings, including overall trends and service impacts.
- Inventory current reporting and application requirements.
- Research how other legal aid funders and philanthropic organizations assess grantee outcomes and impact.
- Design a standardized reporting requirement template to be used across all grant types.
- Develop potential ways to use data to monitor and communicate impact.

Next Steps



Present project
plan at 2/28 LSTFC
Meeting

Inventory existing
grantee data, 5-
year look back
report, research
other funders and
best practices

Launch & engage
with stakeholder
working group for
regular feedback

Share updates &
recommendations
with PDI
Committee and
LSTFC





Discussion Questions

1. What grantee data have you found the most useful to inform decision-making?
2. What grantee data do you wish you had access to or more information about and why?



Thank you!

- For questions or to share additional information, please contact:
- Christal Bundang, Principal Program Analyst, at christal.bundang@calbar.ca.gov.

