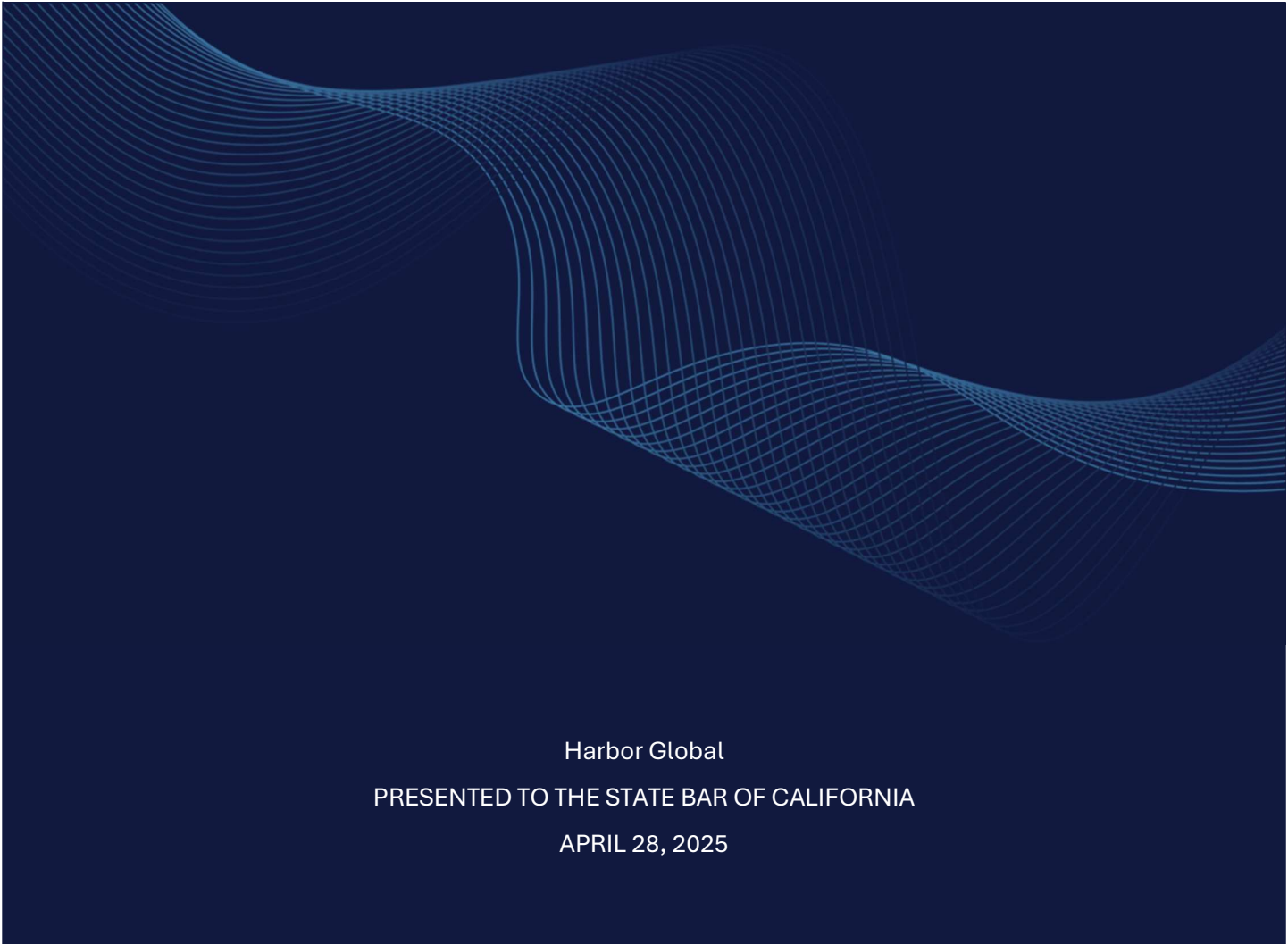


4.1 Discussion Regarding the Scaling Access to Justice: A Legal Tech Blueprint Report



Scaling Access to Justice: A Legal Tech Blueprint

Defining, launching, and sustaining a strategic Legal Tech Initiative
to provide technical assistance to California grantees statewide.



Harbor Global
PRESENTED TO THE STATE BAR OF CALIFORNIA
APRIL 28, 2025

Contents

Introduction	1
Summary of Engagement	2
Methodology	3
1. Preparation and Contextual Review	3
2. Data Collection and Engagement	4
3. Synthesis and Analysis.....	5
Core Project Team	6
Timeline of Assessment Phase of Initiative	7
Findings from Current State Assessment.....	7
Macro View of Opportunity	7
Justice Gap Reality	7
AI as a Transformative Force Multiplier	8
Economic and Efficiency Imperatives	9
Enhancing, Not Replacing, Legal Expertise.....	9
Responsible Innovation	9
OA&I Current State Regarding Strategic Tech.....	10
Grantee Population Current State Regarding Strategic Tech	10
Learnings from Broad-based GenAI Survey October 2024	10
Learnings from Grantee Deep Dive December 2024.....	13
Emerging Focus Areas Based on Recent Federal Policy Changes	16
Additional Grantee Feedback on Federal Policy Response Needs (March 2025)	17
Prioritized Goals and Opportunities.....	18
Transforming Access to Justice Through Strategic Innovation	18
Shifting from Reactive to Strategic Innovation.....	18
Cultivating a Resilient Innovation Ecosystem.....	19
Countering the Risk of Technological Inequality.....	19
Enabling Transformation Through Strategic Support.....	20
Envisioning Impact at Scale.....	20

Scaling Access to Justice:
A Legal Tech Blueprint

Building Bridges to Implementation	21
Actionable Recommendations.....	22
1. OA&I Structure and Governance	22
1A. Invest in Centralized Strategic Leadership	22
1B. Establish Governance Structure	23
2. AI Models, Frameworks, and Priorities.....	24
2A. Establish an AI x A2J Maturity Model.....	24
2B. Develop AI Risk Management Framework.....	26
2C. Establish Mapping and Measures Model	27
3. Engage Key Supplier Network.....	28
4. Resource and Network Sharing	29
4A. Establish Resource Sharing Platform	29
4B. Establish AI Champion Community of Practice.....	30
5. People Resources and Training	31
5A. Develop Training and Capacity Building Framework	31
5B. Develop Role-Based Technology Adoption Plans	32
6. Develop Tech-Enabled Pro Bono Engagement Strategy.....	33
7. Potential Future Phases	34
7A. Foster Simple Data Sharing and System Connections	34
7B. Long-term Governance and Sustainability Framework	35
Conclusion and Next Steps.....	36
Appendix	37
About Harbor	37
Sources	37
Companion Document	39

Introduction

The State Bar of California (the State Bar) Office of Access & Inclusion (OA&I) is committed to expanding equitable access to legal services for low- and moderate-income Californians. In alignment with its mission to support and enhance the delivery services, **OA&I will launch a statewide Legal Tech Initiative that empowers grantees to understand and safely deploy cutting-edge technology. The initiative aims to enhance service delivery, streamline operations, and expand access to justice at scale.**

By leveraging artificial intelligence (AI), technological automation, and integrated legal systems, this initiative will provide strategic technical assistance and implementation support to ensure that grantees can maximize their impact, reduce administrative burdens, and extend their reach to underserved communities.

This initiative focuses specifically on artificial intelligence (AI) as a transformative technology, with a comprehensive approach that spans both specialized legal AI tools and general-purpose AI applications. We recognize that AI's value to grantees can be realized across multiple dimensions:

1. **Legal-Specific AI Solutions:** Specialized applications designed for legal workflows, including AI-powered legal research platforms, case prediction tools, and document review systems tailored to legal contexts.
2. **General-Purpose AI Tools:** Widely available AI applications that can enhance operational efficiency, such as AI assistants for drafting communications, transcription services, summarization tools, and administrative automation.
3. **AI-Enhanced Service Delivery:** Applications that directly expand access to justice through client-facing tools like multilingual chatbots, guided interviews, and automated document generation.

This initiative aims to foster a culture of innovation that enables grantees to evaluate, test, and strategically implement AI across all areas of their operations, identifying opportunities for impact regardless of whether they come from legal-specific or general-purpose AI technologies.

Through a structured roadmap, this initiative will:

- Identify and prioritize opportunities for automation and process improvement across grantees.

Scaling Access to Justice: A Legal Tech Blueprint

- Centralize strategic leadership and resources in a hub-and-spoke model to support California Interest on Lawyers' Trust Accounts (IOLTA) grantees through capacity-building provided by the State Bar.
- Develop a sustainable technology adoption strategy, ensuring alignment with OA&I's broader access-to-justice and DEI objectives.
- Facilitate statewide implementation of key legal tech solutions, including AI-powered legal assistance, document automation, case management enhancements, and self-help tools.
- Support training and long-term sustainability, equipping grantees with the knowledge and resources needed to maintain and scale their technology investments.

This roadmap will deliver a phased implementation plan, balancing short term goals (6-12 months), intermediate goals (1-2 years), and longer-term objectives (2+ years) to ensure legal technology adoption is impactful, sustainable, and strategically aligned with the State Bar of California and the evolving needs of its grantees.

By modernizing grantees' operations, enhancing pro bono engagement, and integrating scalable technology solutions, this initiative will redefine how the State Bar supports grantee organizations and consequently, how legal services are delivered in California—making justice more accessible, efficient, and equitable for all. As outlined in the Legal Services Trust Fund Commission's (LSTFC's) Five-Year Strategic Plan, a key priority is to “expand capacity of grantees/legal aid nonprofits statewide through training and technical assistance initiatives,”¹ which thoroughly aligns with the recommendations for modernization outlined here.

Summary of Engagement

In October 2024, the State Bar engaged the global consulting firm Harbor to lead the initial development of the Legal Tech Initiative. Specializing in strategy, legal technology, operations, and intelligence, Harbor provides advisory services to leading law firms and corporate legal departments. Harbor partnered with OA&I to conduct a comprehensive assessment of the State Bar's current practices and its work with grantee organizations, identifying key areas for improvement and actionable recommendations. This report presents Harbor's findings, analyses, and strategic recommendations, serving as the foundation for the Legal Tech Initiative.

¹ Legal Services Trust Fund Commission (2023), Five Year Strategic Plan, p.8.

Methodology

Our methodology for gathering information and formulating our assessment report was systematic, iterative, and informed by both primary and secondary research methods. This approach was intended to ensure that our findings and recommendations are grounded in the lived realities of grantees, shaped by prior research, direct engagement, and comparative analysis. Harbor partnered with OA&I to understand the cultural, institutional, and technological landscape of the grantees, as well as the structure of service and support from the State Bar. Our approach was shaped by three key methodological pillars:

1. Preparation and Contextual Review
2. Data Collection and Engagement
3. Synthesis and Analysis

Each of these pillars built upon the others, ensuring a cumulative and reflexive process where insights were continuously refined and validated.

1. Preparation and Contextual Review

Before designing our primary data collection tools (e.g., Responses to Request for Information [RFIs]), interview guides), we conducted a thorough review of existing data and prior research efforts to ensure that our methodology was informed, relevant, and aligned with the realities of grantee organizations. This preparatory work served to contextualize our findings and allowed us to avoid redundant inquiries, instead focusing on areas requiring deeper exploration.

Key preparatory activities included:

- Analysis of “GenAI Grantee Survey Results” (October 2024)
 - This survey provided quantitative and qualitative insights into how grantee organizations are understanding, using, and approaching AI technologies.
 - We paid close attention to expressed needs (e.g., document automation, client intake, and triage), as well as concerns related to cost, data security, ethics, and training gaps.
 - The resulting analysis served as a baseline, allowing us to identify emerging themes, recurring concerns, and priority opportunities for AI adoption.
- Engagement with OA&I Leadership and Prior Initiatives
 - To understand the institutional perspective, we conducted interviews with OA&I, reviewing their current operations, systems, and past and present legal technology initiatives.

- These discussions helped us understand prior successes, barriers to adoption, and organizational priorities—ensuring that our recommendations are both practical and feasible within the broader regulatory and funding landscape.
- An institutional approach aligns with the LSTFC's strategic commitment to "increase access to legal aid through greater accountability, transparency, and visibility" and their goal to "utilize new and existing data to enhance communications around grantee and program outcomes."²
- Leveraging Broader Technological Expertise
 - As specialists in legal technology, we incorporated comparative insights from similar technology adoption initiatives, ensuring that our approach was grounded in best practices from the field.
 - This broader perspective helped us anticipate challenges, assess feasibility, and contextualize our findings within global and national trends in legal innovation.

2. Data Collection and Engagement

With the foundational landscape analysis completed, we designed and executed a structured engagement process to directly gather insights from a representative set of grantees. This involved:

- Refining Interview Questions Based on Prior Research
 - The insights gathered from the GenAI survey and OA&I discussions directly shaped our interview questions.
 - RFI.
 - Instead of broad, generic inquiries, we tailored our questions to focus on identified needs, specific AI use cases, and organizational readiness for technology adoption.
- Conducting Targeted Interviews with Grantees
 - We engaged a diverse subset of State Bar grantees to validate prior findings and uncover new insights regarding:
 - Existing technology infrastructure
 - AI use cases and interest areas
 - Barriers to implementation (financial, technical, ethical)
 - Resource needs for effective AI adoption

² Legal Services Trust Fund Commission (2023), Five Year Strategic Plan p.6.

- The interview process was structured iteratively—meaning we adjusted lines of questioning based on initial findings to ensure deeper exploration of critical themes.
- Comparative Analysis & Identifying Trends and Gaps
 - As interviews progressed, we began systematically mapping shared challenges and opportunities, refining our understanding of:
 - Which AI applications held the most promise for grantee organizations
 - What gaps existed in training, governance, and funding
 - How technology adoption varied across different types of grantees

This methodology allowed us to engage in ongoing validation and refinement, ensuring that our findings were accurate, representative, and actionable.

3. Synthesis and Analysis

With a broad sample set of inputs collected, our final assessment phase focused on synthesizing findings into a structured roadmap. Our approach included:

- Triangulation of Findings
 - We compared and cross-referenced the data from the:
 - GenAI survey results
 - OA&I interviews
 - Responses to RFIs received from grantees
 - Direct interviews with grantees
 - Broad-based research and experience in transformational implementation of AI solutions
 - This process allowed us to identify areas of convergence and divergence, ensuring that our recommendations were based on consistent patterns rather than isolated observations.
- Prioritizing Opportunities for Future State
 - Based on the challenges, needs, and opportunities identified, we categorized and prioritized future state requirements for the Legal Tech Initiative.
 - This resulted in the development of a structured framework of recommendations, outlining:
 - Short-term quick wins (6-12 months)
 - Intermediate milestones (1–2 years)
 - Long-term strategic goals (2+ years)

Scaling Access to Justice: A Legal Tech Blueprint

- Developing Implementation Framework & Sustainability Plan
 - Recognizing the need for long-term adoption and sustainability, we provided:
 - A leadership and governance structure to ensure strategic coordination and oversight.
 - Role-based implementation frameworks that address diverse user needs across grantee organizations.
 - Ecosystem-building recommendations including champion networks and communities of practice.
 - Measurement models to track progress and demonstrate impact to stakeholders.
 - Strategies for both specialized legal AI applications and general-purpose AI tools that can enhance operations.

Core Project Team

Our multidisciplinary team developed recommendations for a Legal Tech Initiative that balances sustainable innovation with practical implementation, creating a flexible framework that can evolve alongside technological advances and organizational readiness. Supported by OA&I leadership's institutional knowledge, the approach is meant to be adaptive, acknowledging the diverse maturity levels across California's grantees landscape while establishing the foundation for long-term transformation in legal service delivery. The Harbor team was comprised of:

- Project Lead & Strategy SME – Leads coordination, stakeholder engagement, and roadmap development, ensuring alignment between legal technology strategy and grantee needs.
- Project Manager – Oversees timelines, deliverables, and structured execution of data collection and roadmap development.
- Process Optimization & Enterprise Legal Management (ELM) SME – Brings expertise in legal operations efficiency, automation, and service delivery best practices.
- Legal Tech & AI SMEs – Providing expertise in AI, workflow automation, and scalable legal technology solutions.
- Change Management & Training SME – Advises on foundational strategies for sustainable upskilling programs for effective tech adoption.

OA&I leadership provided essential insights into grantee needs, past technology initiatives, and funding structures, ensuring that our roadmap is both innovative and practical for statewide adoption.

Timeline of Assessment Phase of Initiative

The timeline of this phase of the initiative, including our assessment and delivery of recommendations, is as follows:

- October – November 2024 Phase 1: Preparation & Landscape Review
 - Review information gathered from grantee surveys and OA&I inputs.
 - Conduct OA&I interviews.
 - Collect and synthesize research findings.
- December 2024 – January 2025 Phase 2: Data Collection & Interviews
 - Develop interview guides.
 - Conduct interviews with samples set of grantees
 - Continue collecting and synthesizing research findings.
 - Identify trends and emerging themes.
- February – March 2025 Phase 3: Analysis & Development
 - Synthesize findings and develop themes and objectives.
 - Align on future state vision for initiative.
- April 2025 Phase 4: Feedback and Final Deliverable
 - Prioritize short, intermediate, and long-term recommendations and roadmap.
 - Present findings and recommendations to the State Bar on April 1, 2025.
 - Convene validation sessions with grantees on April 4, 2025.
 - Finalize roadmap report with the benefit of any additional grantee guidance by April 15, 2025.

Findings from Current State Assessment

Macro View of Opportunity

The justice gap in California presents both a persistent challenge and a compelling opportunity for technological innovation. Despite the significant efforts of grantees, existing resources remain insufficient to meet the overwhelming need for legal services. Given the current national landscape, grantees need now more than ever to optimize time and resources to continue to provide support to California's at-risk communities.

Justice Gap Reality

Low-income Californians must often navigate critical civil matters on their own, highlighting a severe justice gap in the state. Based on the latest findings, the vast majority

Scaling Access to Justice: A Legal Tech Blueprint

of civil legal problems experienced by low-income Californians receive no assistance or inadequate help from a lawyer. In fact, the State Bar’s 2019 Justice Gap Study found that approximately 86% of legal issues reported by low-income Californians received no or inadequate legal help.³ This aligns with national research showing “low-income Americans do not get the help they need for 92% of their civil legal problems, even though 74% of low-income households face at least one civil legal issue in a single year.”⁴

The justice gap encompasses critical issues that directly impact human dignity and well-being—including housing security, family stability, immigration status, and economic opportunity. While grantees work diligently to address these needs, traditional service delivery models cannot scale to meet the overwhelming demand without significant innovation.

AI as a Transformative Force Multiplier

Emerging legal technology, particularly generative AI, represents the next significant evolution in a long history of technological advancement in legal services. Building on previous innovations like the transition from physical law libraries to digital research platforms and from fax to email, today's AI solutions offer enhanced capabilities to grantees to:

- Enable legal professionals to focus their expertise on complex client needs.
- Further reduce administrative burdens and routine documentation tasks
- Significantly increase the speed and consistency of legal information delivery
- Process massive amounts of information quickly for identification of patterns or inconsistencies.
- Provide expedient summarization and analysis of long form legal documents.
- Expand service and facilitate easier communication through real time language translation.
- Support scalable self-help resources for appropriate legal matters.

These capabilities work together as a unified system rather than isolated tasks. Processing efficiency enables consistent service delivery, which frees legal professionals to focus on complex matters, creating a multiplier effect that fundamentally expands grantees' capacity beyond simple task automation.

³ The State Bar of California (2019), The California Justice Gap: Measuring the Unmet Civil Legal Needs of Californians.

⁴ Legal Services Corporation (2022), The Justice Gap: The Unmet Civil Legal Needs of Low-income Americans.

Economic and Efficiency Imperatives

The strategic deployment of AI-powered legal technology offers a pathway to more efficient resource allocation. By automating routine processes and enhancing service delivery models, grantees can:

- Process higher volumes of similar cases.
- Better leverage limited pro bono resources.
- Improve consistency in service delivery.
- Generate data insights to inform future service prioritization.
- Reduce costs associated with repetitive tasks.

These benefits can form a progressive cycle: automation enables processing higher volumes of cases/work/x, which necessitates better resource coordination, generating data for strategic decisions that further reduce costs—creating compounding returns on technology investments across the grantee ecosystem.

Enhancing, Not Replacing, Legal Expertise

A critical principle of this initiative is that AI serves as a tool for legal professionals—enhancing their capabilities rather than replacing their judgment. When properly deployed, these technologies can preserve the essential human elements of grantees’ work while significantly reducing or eliminating administrative burdens that divert resources from client service.

Responsible Innovation

The opportunity before us requires thoughtful implementation that acknowledges both the transformative potential of legal technology and the ethical imperatives of its use. Success depends on aligning technological solutions with:

- The 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.

These elements form an integrated framework where client needs inform security requirements, which shape ethical guidelines, ultimately supporting adoption strategies that maintain focus on expanding access to justice while mitigating potential risks.

By strategically embracing legal technology, California's grantees ecosystem can expand access to justice at scale while ensuring these innovations serve the people and

communities most in need of legal assistance. Accordingly, this initiative represents a concrete step toward realizing the LSTFC's fundamental goal of "closing the California justice gap by increasing equitable access to legal services for low-income and underserved communities."⁵

OA&I Current State Regarding Strategic Tech

OA&I plays a critical role in expanding equitable access to legal services for low- and moderate-income Californians. Historically known for its stewardship of grantee funding, OA&I is evolving into a strategic partner to legal services organizations across the state, not only distributing resources but also actively shaping the direction of innovation and impact in the sector.

OA&I is uniquely positioned to harness and amplify the energy and experimentation happening within the grantee ecosystem. While many providers have explored technological solutions in an ad hoc manner, there is a growing need for more coordinated, strategic support to ensure that emerging tools, including AI and automation, are deployed safely, ethically, and effectively.

Aligned with the State Bar's 2022–2027 Strategic Plan, which envisions the State Bar as an incubator for innovation, OA&I is poised to lead by example: sharing best practices, scaling successful models, and supporting implementation efforts across its network of grantees. The Legal Tech Initiative reflects OA&I's expanding role as a leader, convener, and infrastructure builder in the pursuit of a more accessible and efficient legal system.

As OA&I expands beyond traditional grantmaking, its leadership in technology adoption, and its investment in capacity-building, will be essential to driving long-term, systemic change in how grantees is delivered statewide.

Grantee Population Current State Regarding Strategic Tech

Learnings from Broad-based GenAI Survey October 2024

Current Awareness and Understanding of GenAI

Results from an October 2024 survey indicate a varied level of familiarity and understanding of GenAI among grantees. While the majority (58%) of the 55 grantee survey respondents report familiarity with GenAI, there are significant gaps in knowledge when it came to specific tools and practical applications within legal aid contexts. A sizable segment of respondents (35%) disagree or strongly disagree that they understand GenAI's

⁵ Legal Services Trust Fund Commission (2023), Five Year Strategic Plan p.2.

Scaling Access to Justice: A Legal Tech Blueprint

potential applications for grantees, indicating a need for targeted education and hands-on exposure to relevant tools.

Current Tool Adoption and Interest

The survey provides insights into respondents' current adoption of and interest in specific AI tools. The current technology landscape shows limited but growing adoption of generative AI tools:

- ChatGPT, a general-purpose GenAI tool, is the most commonly used generative AI tool among grantees.
- Other tools used include Westlaw (legal research and GenAI integration), Copilot (general productivity and GenAI integration), Gavel (legal document automation with GenAI capabilities), Perplexity (GenAI-powered search), CaseText (legal research and GenAI integration), and Everlaw (eDiscovery with GenAI features).
- Many organizations report "None" for current AI tool usage, highlighting significant room for growth in legal tech and automation.
- There is considerable uncertainty about which tools would be most valuable, with many respondents marking "Unsure" when asked which tools they would like to learn more about.
- Interest in legal-specific generative AI tools is emerging, with CoCounsel, Copilot, Gavel, and legal research tools appearing in their areas of practice.

Perceived Value and Application Areas

Grantees see potential value in specific application areas that could support their work:

1. Document-related tasks show highest perceived value in supporting the work of organizations:
 - a. Document translation (69% rate as "very effective" or "somewhat effective").
 - b. Legal research (69% rate as "very effective" or "somewhat effective").
 - c. Document review (64% rate as "very effective" or "somewhat effective").
 - d. Data analysis and reporting (60% rate as "very effective" or "somewhat effective").
2. Case management and tracking, document management, and e-discovery were each perceived to be potentially "very effective" or "somewhat effective" by more than 50% of the respondents.
3. Client-facing functions like scheduling and client communications show a range of perceptions, with fewer organizations rating them as potentially "very effective."

Current Workflow Bottlenecks and Opportunities

The survey identifies clear priority areas where grantees face operational challenges that could be addressed through AI:

1. Document preparation and review activities represent the single largest opportunity with 29% of respondents identifying this area and specifically citing:
 - a. Drafting pleadings, motions, and court documents.
 - b. Document management and organization.
 - c. Translation of evidence and documents.
 - d. Creating templates and guided interviews.
2. Client communication and follow-up was identified by 18% of respondents as an area of need, with administrative burdens noted in:
 - a. Following up on missing documents.
 - b. Sending routine client updates and notifications.
 - c. Managing initial inquiries.
3. Intake and screening processes were flagged by 13% of respondents, who highlighted bottlenecks in:
 - a. Initial eligibility determination.
 - b. Triaging and routing clients to appropriate services.
 - c. Processing intake forms.
4. Administrative tasks spanning scheduling, data entry, and case management also represent pain points across organizations that responded to the survey.

Implementation Concerns and Priorities

Grantees express clear priorities for AI implementation decisions:

1. Data security is overwhelmingly rated as "extremely important" (90% of respondents).
2. Accuracy is the second highest concern (78% of respondents rate it as "extremely important").
3. Ethical considerations and Unauthorized Practice of Law concerns are significant (62% of respondents rate as "extremely important").
4. Cost presents a practical barrier (49% of respondents rate it as "extremely important").
5. Ease of use, while receiving fewer strong responses, remains an important consideration for successful adoption for most respondents.

This analysis suggests that while grantees recognize the potential value of AI in addressing key operational challenges, significant gaps remain in specific knowledge, tool awareness,

and implementation readiness. **A successful Legal Tech Initiative will need to address these gaps through targeted education, clear use case development focused on document workflows, and robust frameworks to manage security, ethical, and cost concerns.**

Learnings from Grantee Deep Dive December 2024

Our deep dive into six archetypes of California grantees revealed a nuanced picture of technology adoption, challenges, and opportunities that complement the broader survey findings. These organizations—ranging from small to mid-sized providers serving diverse communities and practice areas—offer valuable insights into the lived reality of legal technology implementation across a sampling of grantees.

Technology Maturity Spectrum

The subset of grantees interviewed in the assessment exhibit varying levels of technological maturity, with most organizations still in the exploratory stages of implementing AI solutions. Even organizations demonstrating high technological maturity and active AI adoption face barriers to scaling these innovations organization-wide. Key observations include:

- **Inconsistent Infrastructure:** While basic technology tools are in place across organizations (case management systems, Microsoft Office), their utilization varies significantly/substantively/x. Many grantees report underutilizing existing technology due to staffing constraints, training gaps, and challenges related to change management.
- **Manual Process Dependency:** Organizations across the maturity spectrum remain heavily reliant on manual processes for core functions. Document preparation, client communication, and intake were consistently identified as areas that consume significant staff time and could benefit from automation.
- **AI Adoption in Early Stages:** Many organizations have limited experience with AI tools, with ChatGPT being identified as the primary tool among early adopters. Even technologically mature organizations remain in the experimental phase when it comes to more specialized legal AI applications.

Critical Pain Points and Bottlenecks

The deep-dive interviews confirmed and expanded upon the survey findings on operational bottlenecks:

- **Document-Centric Challenges:** Document preparation, review, and management emerged as the most significant pain point across both the survey (16 mentions)

and the deep dive interviews. Legal Aid Society of San Bernardino (LASSB), Legal Assistance to the Elderly (LAE), and University of San Diego School of Law Legal Clinics (USD) specifically highlighted discovery responses, pleadings, and document preparation as requiring major investments in time.

- **Client Intake Inefficiencies:** Multiple organizations identified intake processes as critical bottlenecks. For example, USD's challenge with high call volumes (5,000+ annually) through manual intake methods reflects a common struggle across the sector.
- **Administrative Burden:** Organizations consistently reported that administrative tasks like data entry and reporting drain resources from direct client services. Lawyers' Committee for Civil Rights (LCCR) specifically noted "over-reliance on manual data entry and reporting processes" as a significant pain point.
- **Knowledge Management Gaps:** Several organizations, including LAE and OneJustice, highlighted challenges with capturing and transferring institutional knowledge, particularly during staff turnover and onboarding.

Implementation Barriers

The interviews revealed several key barriers to technology adoption that must be addressed for successful implementation:

- **Funding Structure Limitations:** The nonprofit funding model, with its emphasis on programmatic rather than operational costs, creates systemic barriers to technology investment. Bet Tzedek Legal Services (Bet Tzedek) noted the difficulty in securing funding for operations and innovation compared to direct service staffing.
- **Capacity and Staffing Constraints:** Limited technical expertise and dedicated staffing for technology initiatives emerged as a universal challenge. LCCR mentioned underutilizing systems due to a "lack of dedicated tech personnel," while USD expressed the need for a "non-student-facing position to evaluate, recommend, and train on technology."
- **Change Management Challenges:** Cultural resistance to technology adoption was identified by several organizations. LASSB emphasized that "leadership buy-in and a receptive organizational culture" are essential for tech adoption.
- **Client-Side Digital Divide:** Organizations expressed important concerns about balancing technology adoption with the needs of their client communities. LAE highlighted challenges related to "client comfort with technology, language barriers, and the need for in-person services for individuals with cognitive impairments."

Scaling Access to Justice: A Legal Tech Blueprint

AI Readiness Assessment

Our deep dive revealed varying levels of AI readiness:

- **Early Adopters:** LASSB stands out for actively leveraging AI for legal research, document drafting, and discovery, demonstrating the technology's potential for other organizations in the sector. LCCR is piloting AI in legal clinics to support pro bono attorneys, offering a model for client-facing uses.
- **Exploratory Phase:** Most organizations are in the exploratory phase, with limited AI experience but growing interest. USD is "encouraging AI adoption among employees" and has access to various AI tools, while Bet Tzedek primarily uses Copilot for administrative tasks.
- **Pre-adoption:** Organizations like LAE and OneJustice have minimal AI experience but express openness to its potential, particularly for administrative and operational efficiencies.

Success Factors for Technology Sustainability

Grantees identified several critical factors for sustainable technology implementation:

- **Dedicated Support Resources:** Organizations consistently emphasized the need for dedicated technical expertise, whether in-house or fractional. Bet Tzedek highlighted the value of "fractional strategic resources" to support innovation.
- **Ongoing Training and Capacity Building:** Continuous training and support were identified as essential for effective technology adoption. LAE stressed "the need for training and support for staff to adopt and utilize new technologies effectively."
- **Sustainable Funding Models:** Organizations emphasized that one-time grants are insufficient for technology sustainability. LASSB noted the challenge of "one-year budgets and the need for ongoing support," while LCCR stressed the importance of "ongoing funding beyond short-term grants."
- **Leadership Engagement:** Several organizations highlighted the importance of leadership support and strategic vision for technology adoption. USD specifically mentioned "ensuring leadership buy-in" as a critical success factor.

Emerging Common Needs

Based on both survey data and deep dive interviews, several common technology needs emerge among grantees:

- **Document Automation Solutions:** Tools that streamline document drafting, review, and management are the highest priority across organizations.

Scaling Access to Justice: A Legal Tech Blueprint

- **Client Communication and Case Management Enhancements:** Upgraded systems for client updates, follow-up, and case tracking would alleviate significant bottlenecks.
- **Intake and Triage Optimization:** Solutions that streamline initial client interactions, eligibility screening, and routing would benefit a majority of organizations.
- **Cross-System Integration:** Better integration between existing systems (case management, document management, data collection) would reduce duplication and administrative burdens.
- **Knowledge Management Tools:** Systems that capture and transfer institutional knowledge would address challenges with staff turnover and training.

Deep-dive findings support survey results while providing crucial context about organizational dynamics, constraints, and readiness factors that must inform the Legal Tech Initiative's implementation strategy. These insights guided our recommendations on how to prioritize solutions, structure support resources, and develop sustainable adoption models.

Emerging Focus Areas Based on Recent Federal Policy Changes

Recent federal policy challenges highlight an increasingly critical demand for nonprofit organizations to improve operational efficiencies and optimization to continue sufficiently supporting at-risk communities. The following efforts should be increasingly prioritized to navigate such challenges effectively:

- **Rapid response coordination capabilities** to mobilize resources and advocacy efforts in real time.
- **Technology solutions** that support coalition-building and collaborative advocacy to amplify collective impact and cohesive responses to challenges.
- **Platforms for shared knowledge and resource management** that ensure critical information reaches those who need it most.
- **Tools to manage expanded pro bono engagement** to efficiently coordinate contributions and maximize legal impact.

By investing in these areas, grantees can enhance their resilience and reliably serve their communities in an evolving policy landscape.

Additional Grantee Feedback on Federal Policy Response Needs (March 2025)

In response to recent political events, and independent of Harbor's assessment, the State Bar and Legal Aid Association of California (LAAC) hosted roundtable discussions with several grantee organizations in February 2025 to evaluate current needs and brainstorm potential solutions. Following these discussions, the State Bar conducted a survey covering key topics such as technology and staffing considerations. The following questions and corresponding responses from the grantee organizations were shared with Harbor as they directly relate to this report:

- “In light of federal policy changes, what can the State Bar and LAAC do to support your organization in its efforts to protect the public (e.g. technical assistance, working groups, coordination, or other non-funding related support)?”
- “What additional non-financial support do you believe your organization will need from state or local agencies, philanthropic organizations, private law firms, advocacy groups, or pro bono networks?”

From the responses collected, several key themes emerged which highlight common challenges, priorities, and opportunities across grantee organizations. These themes are categorized as follows:

- Coordination challenges in response to policy changes.
- Resource sharing and platform needs to prevent duplication.
- Technical assistance to navigate changing regulatory landscapes.
- Enhanced pro bono engagement and coordination.

These themes provide valuable insights into areas requiring further attention and potential strategic initiatives across a broader sampling of grantee organizations than those originally interviewed by Harbor. Notably, these key themes align with the conclusions drawn from Harbor's assessment. This consistency reinforces the highest-priority opportunities for impact that are critical to achieving meaningful improvements outlined in this report.

Prioritized Goals and Opportunities

Transforming Access to Justice Through Strategic Innovation

The California legal aid ecosystem stands at a pivotal moment. The intersection of overwhelming legal need, rapid technological changes, and growing organizational readiness creates an unprecedented opportunity to fundamentally transform how justice is delivered to underserved communities. Moving beyond isolated, opportunistic technology adoption toward a coordinated, strategic approach will meaningfully expand the capacity of grantees to fulfill their missions.

Shifting from Reactive to Strategic Innovation

Our assessment reveals that while many grantees recognize technology's potential, their approach has been largely reactive and piecemeal constrained by funding limitations, capacity challenges, and operational pressures. The Legal Tech Initiative must catalyze a shift from this reactive posture to strategic leadership that:

- Envisions technology as a mission multiplier rather than merely an operational tool.
- Prioritizes sustainable adoption over short-term fixes.
- Distributes innovation benefits equitably across organizations of all sizes.
- Builds collective capacity through shared learning and resources.

A key principle of this initiative is its inclusive approach to AI adoption. Rather than limiting focus to specialized legal AI applications, we recommend exploring the full spectrum of AI technologies that can enhance grantees operations. This means:

- Leveraging widely available general-purpose AI tools for immediate operational improvements in communication, administration, and knowledge management.
- Strategically implementing specialized legal AI solutions for complex legal workflows when appropriate.
- Cultivating an innovative mindset that continuously evaluates emerging AI capabilities against organizational needs, regardless of whether they were designed specifically for legal applications.

This approach recognizes that meaningful digital transformation often begins with accessible, general-purpose tools that build technical literacy and confidence, laying the groundwork for more specialized applications tailored to organizational needs and goals. The maturity model and implementation roadmap support this adaptive strategy, helping

organizations progress from entry-level AI adoption to more sophisticated implementations based on their specific needs and capabilities.

Cultivating a Resilient Innovation Ecosystem

At the heart of our vision is the cultivation of a self-sustaining innovation ecosystem in which grantees not only implement technology but actively shape its evolution. This requires:

1. **Democratizing Access to Technology:** Ensuring that technological benefits extend beyond well-resourced organizations to smaller providers through scalable, accessible solutions and implementation support.
2. **Developing Sustainable Models:** Creating funding and support structures that enable continuous improvement rather than episodic adoption, breaking the cycle of short-term technology initiatives.
3. **Fostering a Learning Culture:** Creating environments where organizations "either win or learn" with each technology initiative, viewing setbacks not as failures but as valuable data points that benefit the entire community.
4. **Building Collective Intelligence:** Establishing mechanisms for sharing insights, solutions, and lessons learned across the grantee community, ensuring that innovation in one organization catalyzes progress in others.

These components create a self-reinforcing cycle: democratized access enables sustainable models, which foster learning cultures, building collective intelligence that further democratizes access, transforming the initiative from a temporary intervention into a self-sustaining community of practice.

Countering the Risk of Technological Inequality

A strategic approach must explicitly address the risk that AI adoption could exacerbate rather than reduce existing inequalities in the legal system:

1. **Preventing a Two-Tiered System:** Designing the initiative to counter the risk that well-resourced organizations gain disproportionate advantages from AI, potentially creating a system where some communities receive inferior AI-driven assistance while others benefit from AI-enhanced human representation.
2. **Bridging Skills and Resource Disparities:** Implementing strategies to ensure smaller organizations with fewer resources develop the technical literacy and implementation capacity needed to effectively leverage AI tools.

Scaling Access to Justice: A Legal Tech Blueprint

3. **Establishing Ethical Safeguards:** Developing robust frameworks to identify and mitigate potential bias in AI tools, particularly when serving diverse communities with complex legal needs.
4. **Mandating Human Oversight:** Prioritizing implementations where legal experts maintain appropriate supervision of AI-generated content, establishing clear boundaries between automation and professional judgment.

These safeguards establish a protective framework that evolves with technology adoption: preventing systemic inequality requires bridging organizational disparities, implementing ethical guardrails, and maintaining appropriate professional oversight—ensuring technology serves as an equalizer rather than a divider when it comes to accessing legal services.

Enabling Transformation Through Strategic Support

OA&I is uniquely positioned to provide strategic leadership that enables this transformation through:

1. **Centralized Expertise with Distributed Implementation:** Establishing a hub-and-spoke model that provides centralized expertise and resources while supporting localized implementation tailored to organizational needs.
2. **Ethical Frameworks and Governance:** Developing robust ethical guidelines and governance structures that ensure technology adoption enhances rather than compromises core values of equity, privacy, and client dignity, including transparency requirements for AI use.
3. **Collaborative Partnerships:** Cultivating strategic partnerships with technology providers, funders, and academic institutions that expand resources available to the grantee community.
4. **Forward-Looking Adaptation:** Maintaining a proactive stance toward emerging technologies, ensuring the grantee community can quickly evaluate and integrate promising solutions while identifying and addressing hallucinations, bias, and other limitations.

Envisioning Impact at Scale

The ultimate goal of this strategic approach is to significantly enhance what's possible in advancing access to justice. With the right coordination, support, and vision, the Legal Tech Initiative can enable grantees to:

- Serve exponentially more clients through automation of routine tasks and streamlined processes.

Scaling Access to Justice: A Legal Tech Blueprint

- Deliver more comprehensive assistance by redirecting staff time from administrative tasks to complex client needs.
- Expand geographic reach through technology-enabled service delivery models.
- Create more equitable access by reducing barriers to service for underserved populations.
- Generate deeper insights through improved data collection and analysis.

Building Bridges to Implementation

This vision for the Legal Tech Initiative is not an aspirational endpoint but a practical framework that guides the specific, actionable recommendations that follow. Aligning tactical interventions with these strategic priorities will ensure that each recommendation contributes to the larger transformation of California's grantee ecosystem while remaining attentive to potential risks and unintended consequences.

The Legal Tech Initiative represents a once-in-a-generation opportunity to reimagine how legal services are delivered to those most in need. By fostering a culture of innovation, democratizing access to technology, and building sustainable models for adoption, the power of AI and other emerging technologies can be appropriately harnessed to significantly expand access to justice across California, ensuring that technological advancement narrows rather than widens the justice gap.

Actionable Recommendations

Based on our assessment, Harbor recommends that OA&I design and execute a Legal Tech Initiative that provides a structured pathway for grantees to leverage technology that advances access to justice. Accordingly, we recommend implementing a centralized leadership model with a dedicated Technology Transformation Lead and governance structure for additional expertise and cohesive orchestration to previous and ongoing efforts in this area.

For implementation, we suggest OA&I adopt a phased approach that first develops essential frameworks before building ecosystem components like resource-sharing platforms and training programs. While this strategic initiative takes shape, we encourage OA&I to continue their valuable ongoing technology efforts in parallel. This dual approach will facilitate a gradual move toward a more coordinated ecosystem that will support a sustainable and innovation-focused community of grantees.

1. OA&I Structure and Governance

1A. Invest in Centralized Strategic Leadership

Owner	Audience	Impact	Timing
OA&I	State Bar and grantees	Foundational - This position creates the essential center point for all other initiative components	Short Term Phase (6-month horizon)

The success of the Legal Tech Initiative hinges on establishing dedicated leadership through a Technology Transformation Lead position that works in close coordination with the existing Office of Operational and Digital Transformation (ODT). The position may benefit from being housed within the same organizational unit (ODT). This integrated approach would create a cohesive technology leadership team that can provide strategic direction, fractional expertise, and implementation support across the grantee ecosystem while developing frameworks for responsible AI adoption. By centralizing specialized knowledge while distributing implementation support, this position would enable both large and small organizations to benefit from technological advancements without each organization having to independently develop in-house expertise.

This investment in leadership is foundational because it addresses the most critical barriers identified in our assessment: limited technical expertise, fragmented innovation efforts, and insufficient capacity for strategic technology planning. Rather than pursuing

Scaling Access to Justice: A Legal Tech Blueprint

disconnected technology initiatives, this approach would create a coordinated ecosystem where lessons learned by one organization benefit all, ethical frameworks evolve collectively, and technology resources are leveraged efficiently.

Balancing Individual and Collective Support

The Technology Transformation Lead would provide support through multiple engagement models:

- **Collective Resource Development:** The primary focus of the Lead would be to create resources, frameworks, and tools that benefit the widest range of organizations.
- **Targeted Group Engagement:** Facilitate cohort-based learning and implementation support for organizations with similar needs.
- **Limited Individual Support:** Offer pathways for more tailored assistance through:
 - Regular office hours where grantees can discuss specific operational and technical challenges.
 - Using the maturity assessment process as an intake mechanism to identify organizations that might benefit from more direct engagement.
 - Providing lightweight technical assistance on specific technology implementation challenges.

This balanced approach enables the Lead to make efficient use of limited resources while still providing avenues for more personalized support when needed. The maturity assessment would serve as both a diagnostic tool and a mechanism to identify which support model would best serve each organization's needs.

Most importantly, this approach would ensure that technological advancement serves the mission of expanding access to justice rather than becoming an end in itself, maintaining focus on the communities that grantees exist to serve.

1B. Establish Governance Structure

Owner	Audience	Impact	Timing
OA&I	LSTFC and State Bar of California	Foundational - Ensures proper oversight and strategic alignment	Short Term Phase (6–12-month horizon)

To provide appropriate governance for the Legal Tech Initiative, we recommend establishing a dedicated Legal Technology Advisory Working Group within the existing Program Development and Impact Committee (the “PDI Committee”). This approach

Scaling Access to Justice: A Legal Tech Blueprint

leverages established governance mechanisms rather than creating a parallel structure, ensuring direct alignment with broader funding priorities while providing necessary oversight for the initiative.

The Working Group would advise on the strategic technology roadmap developed by the Tech Transformation Lead, providing guidance on the prioritization of technology investments, ensuring alignment with access to justice goals, and monitoring progress of the initiative. Working group membership should include commissioners from the PDI Committee with relevant expertise, select grantee representatives with technology implementation experience, and potentially external technology advisors to provide diverse perspectives.

By embedding governance within the PDI Committee structure, the initiative leverages established oversight mechanisms while maintaining operational flexibility. Additionally, recommendations would be brought through the PDI Committee to the LSTFC as appropriate. This ensures technology investments serve the LSTFC's broader mission while providing the Tech Transformation Lead with clear direction and accountability channels.

2. AI Models, Frameworks, and Priorities

2A. Establish an AI x A2J Maturity Model

Owner	Audience	Impact	Timing
OA&I	Grantees	Foundational - Creates structured pathway for technological advancement	Timing: Phase 1 (Short Term: 6–12 months), Phase 2 (Intermediate: 1–2 years)

Establishing a comprehensive maturity model will provide a structured framework to help grantees assess their current technological capabilities and develop a roadmap for strategic advancement. This model will define progressive levels of AI readiness from basic awareness through advanced implementation, with clear benchmarks and capabilities defined at each level.

Components - The AI x A2J Maturity Model will be developed in two phases:

- Phase 1 (Short Term: 6–12 months): Develop the Diagnostic Assessment Tool:
 - Create a comprehensive assessment framework that helps organizations understand their current AI readiness.

Scaling Access to Justice:
A Legal Tech Blueprint

- Identify specific strengths, gaps, and readiness factors across key dimensions.
 - Provide a clear visualization of an organization's technology maturity profile
 - Create a baseline for measuring progress over time.
 - Test and refine the assessment with a pilot group of grantees.
 - Use assessment results to inform subsequent toolkit development.
- Phase 2 (Intermediate: 1–2 years): Develop Stage-Specific Implementation Toolkit:
 - Based on assessment findings and early implementation experiences, create customized resources for each maturity level.
 - Include templates, checklists, and guidance documents appropriate for organizational needs identified through the assessment process.
 - Develop implementation roadmaps tailored to organizational size and capacity.
 - Offer use case examples relevant to the organization's current capabilities.

Operational Implementation - The maturity model should be operationalized through a structured process:

- Grantees complete the assessment independently or with lightweight facilitation.
- The Tech Transformation Lead reviews assessment results.
- Based on results, the Lead provides:
 - A tailored toolkit matching the organization's maturity level.
 - An invitation to join a cohort of similar-stage organizations for peer learning.
 - Recommendations for specific initiative components most relevant to their needs.
- For organizations with unique challenges or opportunities, the Tech Lead may offer limited direct technical assistance.

This approach ensures the Tech Lead can efficiently provide tailored support at scale, while still reserving capacity for more direct engagement where it is particularly valuable. By establishing a structured maturity curve, the Legal Tech Initiative helps ensure that grantees adopt AI responsibly, receive support aligned with their specific readiness level, scale their impact through appropriate technology choices, and demonstrate measurable progress valuable both internally and externally to funders.

This model transforms AI adoption from a theoretical goal into a practical, scalable transformation for grantees, with clear pathways for advancement regardless of an organization's starting point.

2B. Develop AI Risk Management Framework

Owner	Audience	Impact	Timing
OA&I with Legal Ethics and AI Subject Matter Experts	Grantees, Technology Partners	Foundational - Ensures responsible technology adoption	Short Term Phase (6–12-month horizon)

Developing a guiding framework for responsibly implementing and managing AI technologies is essential for legal service organizations to maximize benefits while fulfilling their professional obligations. This framework will align with the State Bar's "Practical Guidance for the Use of Generative Artificial Intelligence in the Practice of Law," which emphasizes that "like any technology, generative AI must be used in a manner that conforms to a lawyer's professional responsibility obligations" and recognizes the unique challenges presented by AI technologies.

Our interviews with grantees highlighted a recognized need for guidance, policies, and careful consideration of potential implications as they explore and adopt AI technologies. The framework will provide:

- Duty-based guidance addressing key professional responsibilities highlighted in the State Bar guidance, including:
 - Confidentiality protocols for client information (Bus. & Prof. Code § 6068(e), Rules 1.6, 1.8.2).
 - Competence and diligence considerations (Rules 1.1, 1.3).
 - Supervision responsibilities for lawyers and non-lawyers using AI tools (Rules 5.1, 5.2, 5.3).
 - Communication practices regarding AI use (Rules 1.4, 1.2).
 - Appropriate charging practices for AI-assisted work (Rule 1.5).
- Risk assessment methodology that can be adapted to each organization's specific context, helping grantees identify and evaluate potential concerns related to:
 - Client confidentiality and data security.
 - Bias and fairness implications (Rule 8.4.1).
 - Accuracy and reliability of AI outputs.
 - Compliance with applicable laws and regulations (Rule 8.4).
- Documentation approaches for tracking AI use cases and governance decisions.
- Educational resources to help grantees understand how various AI applications might impact their professional obligations.

By establishing these resources with sufficient time for thorough development, stakeholder input, and legal review, the initiative can foster responsible innovation that

builds trust while preventing harmful implementations that could disproportionately impact vulnerable populations. This approach acknowledges that AI ethics and risk management require ongoing attention rather than a one-time solution, providing essential structure to support responsible innovation across the grantee ecosystem.

2C. Establish Mapping and Measures Model

Owner	Audience	Impact	Timing
OA&I with Mission Advancement & Accountability Division (MAAD) Support	Grantees, Funders, State Bar Leadership	Advanced - Enables data-driven decision making	Intermediate Phase (1–2-year horizon)

This recommendation reflects the need for a comprehensive framework to measure the impact of technology investments on access to justice outcomes. The model will map specific legal workflows (eviction defense, expungement, etc.) to appropriate technology solutions, identifying how tools can accelerate service delivery without introducing new risks like privacy violations or algorithmic bias.

Rather than prescribing specific technologies, this approach empowers grantees to diagnose their specific needs within different practice contexts and select appropriate solutions. For example, organizations will be able to identify how document automation can accelerate responses to time-sensitive eviction filings or how AI-assisted eligibility screening can expand expungement clinic capacity.

Key components include standardized key performance indicators (KPIs) for both operational efficiency and client impact, data collection protocols that minimize burden on grantees, and practical evaluation tools including technology selection criteria and risk assessment templates. The framework will specifically incorporate measures for rapid response coordination during policy changes, directly addressing recent grantee feedback regarding collaboration in times of urgency.

Through this mapping process, the Tech Transformation Lead will facilitate the identification of 3–5 specific technology solutions for each of the top priority use cases identified by legal services organizations. This approach will deliver:

- Validation of top use cases (document review/preparation, client intake, administrative tasks, knowledge management) through the maturity assessment process.
- Evaluation and selection of appropriate solutions for each use case, with consideration for organizations at different maturity levels.

Scaling Access to Justice: A Legal Tech Blueprint

- Development of implementation guides and training resources for selected solutions.
- Pilot implementations with representative organizations to refine approaches.
- Scaled deployment across the grantee ecosystem with appropriate support.

By focusing on specific operational challenges rather than advocating an "AI-first" approach, this model helps organizations move beyond finding "the current best tool" to establish sustained practices for technology selection and impact assessment that demonstrate return on investment (ROI) to board members, funders, and other stakeholders. The solution-focused outcomes deliver tangible value to grantees while building momentum for broader technological transformation, creating a clear path to implementation that many organizations would struggle to navigate independently.

3. Engage Key Supplier Network

Owner	Audience	Impact	Timing
OA&I with Procurement Specialists	Technology Vendors, Academic Partners	Advanced - Enables scale and specialized capabilities	Intermediate Phase (1–2-year horizon)

Developing strategic partnerships with key technology suppliers will create opportunities for collaborative procurement, customized grantees solutions, and preferential pricing models. This network will establish a comprehensive partnership ecosystem that includes legal technology vendors, academic institutions for research and evaluation, and pro bono technical assistance from private sector donors and nonprofit sector partners.

The strategy will emphasize rigorous security vetting and effectiveness evaluation to ensure partners meet the unique needs of grantees. Key components include standardized security assessment criteria, collaborative procurement mechanisms that leverage scale across multiple organizations, and streamlined contracting processes to reduce administrative friction. This approach directly addresses challenges identified in grantee interviews regarding multiple contracting entities and security concerns as barriers to technology adoption.

By creating structured feedback channels between grantees and suppliers, this network will drive continuous product improvements while exploring innovative models for engaging private sector expertise through pro bono technical assistance programs. This ecosystem approach transforms the traditional vendor-client relationship into strategic partnerships that better serve the access to justice mission.

4. Resource and Network Sharing

4A. Establish Resource Sharing Platform

Owner	Audience	Impact	Timing
OA&I	Grantees	Intermediate - Reduces duplication and accelerates knowledge transfer	Intermediate Phase (1–2-year horizon)

A centralized resource-sharing platform will serve as a clearinghouse for templates, training materials, process documentation, and technical resources that organizations can adapt and implement. This recommendation directly addresses the widespread duplication of efforts identified in grantee feedback, where multiple organizations create similar materials independently.

Initial implementation will focus on high-demand documents identified by grantees, including Know Your Rights materials, pro bono training resources, and client intake forms. This approach delivers quick wins like model client onboarding documents while building toward a comprehensive knowledge repository. As highlighted at the 2025 Legal Services Corporation (LSC) Innovations in Technology Conference, many organizations identified resource duplication as a significant drain on limited resources that could be better directed toward client services. The platform will incorporate AI-powered search and recommendation features to help organizations quickly find relevant resources, with version control and collaborative editing capabilities to support continuous improvement.

By creating organizational memory that withstands staff turnover, this platform will significantly enhance efficiency across the grantee ecosystem. Insights from successful grantees' technology initiatives confirm that centralized resources and knowledge sharing produces significant efficiency gains while process mapping often reveals previously unknown redundancies. This recommendation responds directly to recent grantee feedback supporting more algorithmic approaches to matching needs with resources during time-sensitive policy responses.

4B. Establish AI Champion Community of Practice

Owner	Audience	Impact	Timing
OA&I with Tech Transformation Lead support	Grantees	Intermediate - Accelerates adoption through peer influence and creates sustainable learning ecosystem	Intermediate Phase (1–2-year horizon)

Building a network of technology champions across grantee organizations will create a sustainable ecosystem for knowledge sharing, peer support, and advocacy for technology adoption. This approach draws on proven change management frameworks from the corporate and law firm sectors, which demonstrate that peer-driven innovation significantly outperforms top-down implementation in achieving lasting organizational change. The Tech Transformation Lead will be responsible for staffing, supporting, and facilitating this community, ensuring its effectiveness and sustainability.

This integrated approach consists of two complementary elements:

Champion Network Component:

- Identify and empower individuals within grantee organizations who demonstrate aptitude and enthusiasm for technology innovation to serve as change agents.
- Provide specialized training to champions, with particular attention to security concerns that often create barriers to technology adoption.
- Implement recognition programs, regular knowledge-sharing sessions, and collaborative problem-solving opportunities to incentivize participation.
- Develop structured communication strategies and phased implementation approaches that respect organizational capacity.
- Establish dedicated processes for managing resistance, enabling champions to accelerate adoption through trusted peer relationships rather than external mandates.

Community of Practice Component:

- Create structured opportunities for peer learning, collaborative problem-solving, and innovation sharing.
- Develop practice-specific sub-groups focused on technology applications within specific legal domains.
- Facilitate regular knowledge-sharing events.
- Create mentorship connections between organizations at different maturity levels.

Scaling Access to Justice:
A Legal Tech Blueprint

- Implement standardized documentation processes to capture and share innovations, creating an evolving knowledge base that survives staff turnover.

By creating a community where grantees can learn from each other about successful legal tech and AI implementations, this network will be able to transform individual successes into collective advancement. This unified community approach builds a sustainable culture of innovation that continues to evolve beyond the initial implementation phase, with early deliverables demonstrating immediate value while the broader community infrastructure develops.

5. People Resources and Training

5A. Develop Training and Capacity Building Framework

Owner	Audience	Impact	Timing
OA&I with Education Partners	Grantees	Intermediate - Builds essential skills for sustainable adoption	Intermediate Phase (1–2-year horizon)

Training and capacity building are vital components of successful technology adoption across the Legal Tech Initiative. We recommend developing a framework that leverages existing resources and creates targeted supplements to address the skills gap identified in grantee assessments.

A successful framework should organize role-specific learning resources, connecting leadership, technical staff, and end users with appropriate training options from technology vendors, peer organizations, and specialized partners. Rather than developing all content from scratch, this approach would curate relevant existing materials and mobilize the champion network to share best practices and provide peer support.

Given resource constraints, we recommend pursuing strategic partnerships with established programs such as Cal Academy at the State of California’s Office of Data and Innovation, as well as the Information Technology Leadership Academy and Digital Services Innovation Academy, both offered by California’s Department of Technology. These collaborations would provide cost-effective access to high-quality training resources while reducing development burden on OA&I.

Sustainability could be achieved through a coordinated ecosystem of learning resources, including vendor-provided certification paths, champion-led knowledge sharing, and standardized documentation templates. By focusing on curation and coordination, rather

than extensive custom development, the framework would maximize impact while maintaining realistic resource requirements. Special emphasis on security, privacy, and ethical considerations should ensure responsible AI implementation, with champions helping translate these principles into practical application within their organizations.

5B. Develop Role-Based Technology Adoption Plans

Owner	Audience	Impact	Timing
OA&I with the Tech Lead	Grantees	Intermediate – Ensures technology addresses specific workflow needs	Intermediate Phase (1–2-year horizon)

The successful adoption of AI and legal technology requires recognizing that different roles among grantee organization require distinct needs, workflows, and priorities. A "one-size-fits-all" approach to technology implementation often fails because it doesn't address the specific pain points experienced by different user groups. This recommendation focuses specifically on identifying and optimizing distinct technology use cases for different roles within legal aid organizations. Unlike the broader capacity building framework (Recommendation 5A) which addresses training and skill development, this initiative focuses on mapping specific technological solutions to the unique workflow needs of each user group:

- Executive Leadership: Strategic frameworks for AI governance, organizational readiness assessment tools, and culture change roadmaps to effectively integrate AI.
- Staff Attorneys: Legal research, document drafting, and analysis tools optimized for complex matters.
- Paralegals and Support Staff: Document preparation and workflow automation solutions.
- Client-Facing Navigators: Intake optimization and customer relationship management tools.

The Tech Transformation Lead will work with organizations to develop customized adoption roadmaps for each user group based on their specific workflows and challenges.

6. Develop Tech-Enabled Pro Bono Engagement Strategy

Owner	Audience	Impact	Timing
OA&I	Grantees	Transformative - Could enhance pro bono service delivery and coordination through technology	Transformation Phase (2+ year horizon)

This initiative focuses on developing technology solutions that help grantees maximize the impact of their pro bono attorney programs, which are a critical component of legal service delivery for many organizations. Many grantees rely heavily on pro bono attorneys to supplement their work and expand their reach. Some organizations, namely LSC grantees, are required to maintain specific pro bono participation levels as part of their funding parameters, while many State Bar grantees work to maximize pro bono engagement to increase their IOLTA/Equal Access Fund allocations through the funding formula.

The strategy will address two interconnected components:

- 1. Pro Bono Attorney Support:** Develop technical solutions that enable pro bono attorneys to work more effectively within grantee organizations. This includes:
 - AI-powered tools for legal clinics, following LCCR's successful model where AI serves as a "copilot" for pro bono attorneys.
 - Knowledge management systems that reduce onboarding time for volunteer attorneys.
 - Technology that streamlines case handoffs between staff and pro bono attorneys.
- 2. Pro Bono Program Coordination:** Improve the systems for managing pro bono programs:
 - Simplified intake and matching mechanisms to connect clients with appropriate pro bono resources.
 - Tools for tracking pro bono hours and impact to support reporting requirements.
 - Platforms for sharing resources and best practices among organizations with pro bono programs.

Rather than relying exclusively on pro bono technical expertise (which can fluctuate with market conditions), this initiative will identify sustainable technology solutions that organizations can implement to strengthen their existing pro bono legal service programs. The focus is on providing grantees with tools that enable them to better leverage pro bono attorney assistance, thereby multiplying their impact and extending their reach to underserved communities.

This approach directly addresses feedback from grantees about coordination challenges in pro bono service delivery and responds to successful models like LCCR's integration of AI tools in legal clinics staffed by pro bono attorneys.

7. Potential Future Phases

The recommendations outlined above establish a strong foundation for the Legal Tech Initiative's first 1–2 years. As we look further into the future, the following recommendations represent initial directions that will likely evolve as the initiative matures. The fidelity of these longer-range recommendations is necessarily less precise than our near-term recommendations, as they will be shaped by emerging technologies, organizational learnings, and the evolving legal services landscape.

These future-focused recommendations should be viewed as directional guidance rather than rigid prescriptions. They anticipate activities focused on sustainability and durable success, recognizing that a successful initiative must continuously adapt to remain relevant. The Tech Transformation Lead and Legal Technology Advisory Working Group should regularly revisit these ideas, refining them based on implementation experience and stakeholder feedback.

With this adaptive mindset, we present two potential future phases that address critical elements of long-term success: interoperability and governance sustainability.

7A. Foster Simple Data Sharing and System Connections

Owner	Audience	Impact	Timing
OA&I with Technical Specialists	Grantees, Technology Partners	Intermediate - Reduces duplicate work and improves collaboration	Transformation Phase (2+ year horizon)

While the Resource Sharing Platform (Recommendation 4) focuses on document sharing and knowledge management, this recommendation specifically addresses technical interoperability between systems. Rather than implementing complex technical standards, this initiative focuses on practical approaches to connecting disparate systems and databases that organizations use.

The Tech Transformation Lead would facilitate development of solutions such as:

- Secure data exchange protocols between case management systems.
- Standardized APIs for connecting client intake platforms.
- Common data formats for reporting and analytics.

Scaling Access to Justice: A Legal Tech Blueprint

- Privacy-preserving methods for appropriate client information sharing between collaborating organizations.
- Standardized spreadsheet formats and secure file-sharing protocols.
- Templates for data-sharing agreements.
- Consistent naming conventions across systems.
- Simple export/import processes between commonly used tools.

This technical infrastructure enables organizations to preserve investments in existing technologies while improving data flow and reducing duplicate entry across systems. This incremental approach allows organizations to enhance information sharing without requiring significant technical expertise or system overhauls.

7B. Long-term Governance and Sustainability Framework

Owner	Audience	Impact	Timing
OA&I with Legal Tech Advisory Working Group	Grantees, Funders, Technology Partners	Transformational - Creates self-sustaining innovation culture	Transformation Phase (2+ year horizon)

The ultimate success of the Legal Tech Initiative depends on transitioning from project-based implementation to a self-sustaining innovation ecosystem. This recommendation recognizes that the above recommendations must evolve into distinct governance structures and funding mechanisms needed for long-term sustainability.

This recommendation creates the foundation for long-term sustainability beyond the immediate implementation timeframe, with five key focus areas:

- **Transition Strategy:** Creating a clear path from the initial centralized support model to a more distributed, community-owned approach as the ecosystem matures, shifting from dependence on centralized support to a resilient, community-owned approach to technological innovation.
- **Governance Evolution:** Establishing how leadership and oversight will evolve as the initiative matures, with clear processes for decision-making and strategic direction.
- **Impact Assessment Framework:** Creating longitudinal measurement approaches to track progress over multiple years, connecting technology adoption to access to justice outcomes through standardized metrics.
- **Technology Refresh Cycle:** Establishing processes for evaluating emerging technologies and sunseting outdated tools through regular assessment cycles that identify shifting needs and ensuring the initiative evolves alongside both community needs and technological capabilities.

Scaling Access to Justice: A Legal Tech Blueprint

By embedding these governance structures and practices within the grantee ecosystem, the initiative will continue to generate value and adapt to changing circumstances well beyond the initial implementation period. This approach ensures the Legal Tech Initiative creates lasting change rather than a temporary improvement, establishing the necessary foundation for continuous evolution rather than episodic adoption.

Conclusion and Next Steps

This blueprint for the Legal Tech Initiative provides a comprehensive roadmap for transforming how California's legal aid organizations leverage technology to expand access to justice. By prioritizing a strategic and sustainable approach to innovation—centered on responsible AI adoption and collaborative ecosystem-building—the State Bar of California can significantly enhance grantees' capacity to serve vulnerable communities. Moving forward, we recommend presenting this report to the PDI Committee and LSTFC at their May 2025 meetings, with implementation to begin immediately. Key immediate steps include: 1) finalizing the Technology Transformation Lead job description and initiating recruitment; 2) establishing the Legal Technology Advisory Working Group within the PDI Committee; and 3) developing the AI maturity assessment tool. With these foundational elements in place by August 2025, the initiative can begin delivering tangible benefits to grantees and the communities whom they serve while building momentum for longer-term transformation. Through deliberate implementation of these recommendations, the State Bar will help ensure technology narrows, rather than widens, California's persistent justice gap.

Appendix

About Harbor

Harbor is a globally integrated team of 800 industry experts across strategy, legal technology, operations, and intelligence, helping leading law firms, corporations, and their law departments achieve breakthrough outcomes. Drawing on decades of hands-on experience in corporate legal and law firm environments, Harbor also leverages extensive industry benchmarking to develop data-driven insights and cutting-edge solutions.

This report was authored by a cross-functional group of legal technology and operations experts at [Harbor Global](#) selected for their relevant expertise. Collectively, the research and authoring team brings:

- Deep experience in enterprise legal management, process automation, and AI-driven tools
- Strong backgrounds in corporate legal departments, consulting firms, and technology providers
- Proven track records integrating data strategy, change management, and user adoption best practices
- A holistic, business-focused approach to legal operations transformation

By combining these specialized skill sets with practical industry know-how and thorough benchmarking insights, the authors ensure that this report's recommendations reflect both strategic vision and operational feasibility.

Sources

- AI Center of Excellence, Onit, Inc., New Zealand (2024) Better call GPT, comparing large language models against lawyers.
- Blickstein Group (2024) Legal service delivery in the age of AI.
- California Department of Technology (CDT) (2023) An innovation roadmap.
- Chien, C., Kim, M., Raj, A., & Rathish, R. (2024) How LLMs can help address the access to justice gap through the courts ["The Berkeley Paper"].
- Cisco (2024) AI readiness index.
- El Hoyek, M., Mueller, C., & Müller, N. (2024) Generative AI will first be successfully scaled in business operations.
- Grammarly (2024) The CIO playbook: Measuring the ROI of AI.

Scaling Access to Justice:
A Legal Tech Blueprint

- Harbor (2025) Advanced technology in legal.
- Harbor (2024) Law department survey.
- Harbor (2024) Information architecture and data readiness.
- Harbor (2025) State Bar grantee interviews and associated themes [Internal document].
- International Legal Technology Association (2024) Technology survey.
- Knowledge at Wharton (2024) What's your company's AI readiness quotient?
- Legal Services Corporation (2022) The justice gap: The unmet civil legal needs of low-income Americans.
- Legal Services Trust Fund Commission (2023) Five year strategic plan.
- Legaltech News: Sprague, J. (2024) The potential of GenAI to promote access to justice.
- LSNTAP (2025) AI for the modern grantees organization.
- MIT (2023) Experimental evidence on the productivity effects of generative artificial intelligence.
- MIT Technology Review (2024) Building a high-performance data and AI organization.
- Simshaw, Y. (2022) Access to A.I. justice. Yale Journal of Law & Technology, 24.
- Technical University of Munich (2024) Legal AI use case radar 2024 report.
- The State Bar of California (2024) Administrative advisory No 23-04; Interim guidelines for use of generative artificial intelligence (AI).
- The State Bar of California (2024) Adopted budget.
- The State Bar of California (2024) GenAI grantee survey results.
- The State Bar of California (2024) Job posting ODT lead.
- The State Bar of California (2025) Legal Services Corporation (LSC)'s innovations in technology conference readout.
- The State Bar of California (2023) Practical guidance for the use of generative artificial intelligence in the practice of law.
- The State Bar of California (2025) Shareout from ITC25 and A2J & AI conferences.
- The State Bar of California grantees (2024) Responses to RFIs [Internal document].
- The State Bar of California (2024, July) Strategic plan 2022-2027 (Rev. ed.).
- The State Bar of California (2025) Survey on Protecting Californians in 2025 and Beyond [Internal survey results].

Scaling Access to Justice:
A Legal Tech Blueprint

- The State Bar of California (2019) The California justice gap: Measuring the unmet civil legal needs of Californians.
- Thomson Reuters Institute (2024) State of the corporate law department.
- Vals (2025). Legal AI report.

Companion Document

1. **Project B Validation Session 2025.04.04 (with Poll Results) Final:** Presentation slides from grantee validation session on April 4, 2025, including live polling results



Strategic Legal Tech Initiative

State Bar of California April 4, 2025

Confidential



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

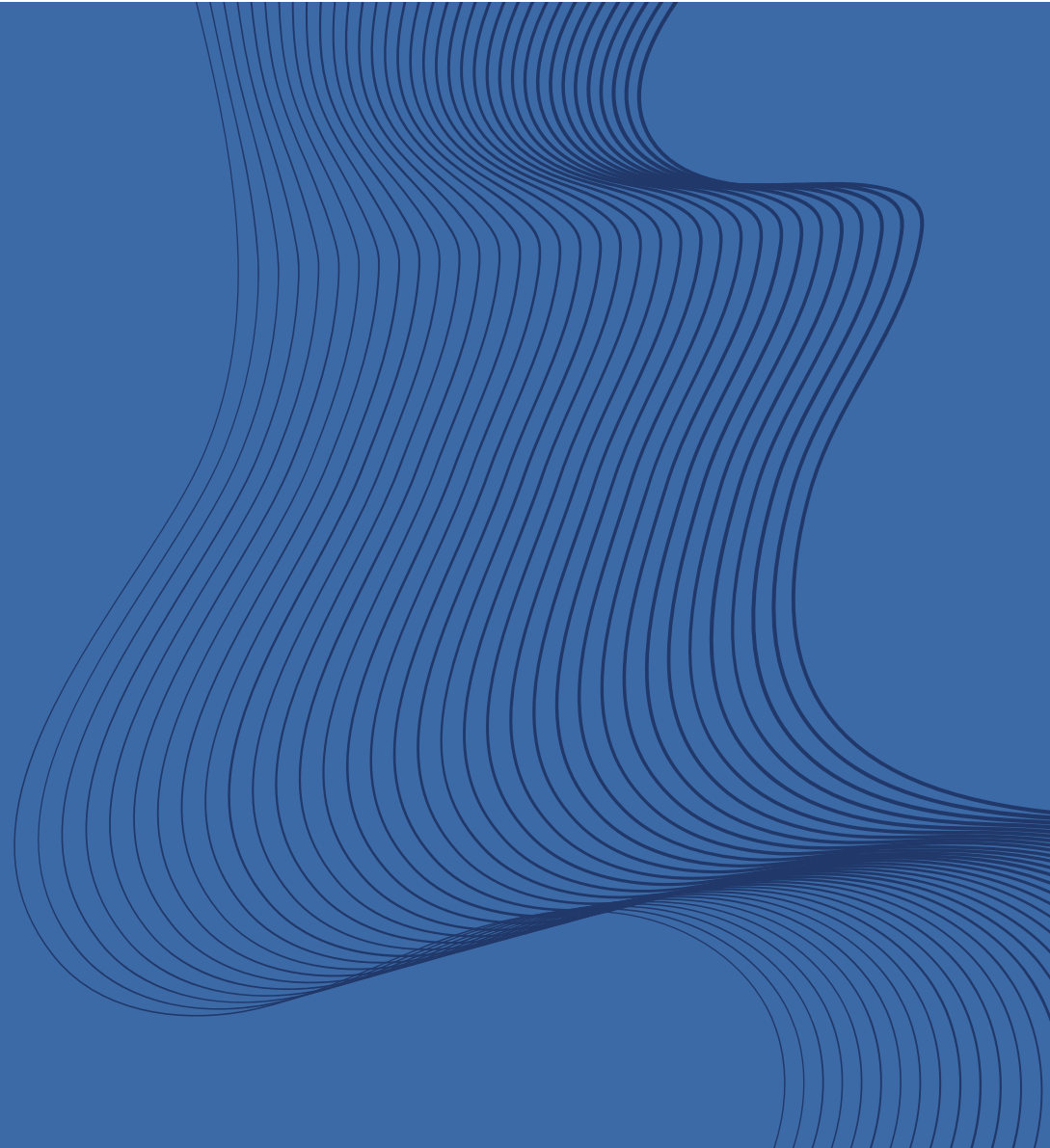


Recommendations

03

HARB(■)R

Approach



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
- Collating & analyzing responses

Roadmap Development

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

Data collection

Strength of insights

APPROACH

Designing Strategy to Fit Different Archetypes

We recognize that all the State Bar grantee organizations are not the same. We've generalized four archetypes of organizations to help contextualize the assessment and recommendations, as well as inform your feedback.

Small QLSP ¹	Small – Medium QLSP & LSCP ²	Large QLSP	Support Center
Archetype 1	Archetype 2	Archetype 3	Archetype 4
<ul style="list-style-type: none"> ▪ ~15–20 FTEs ▪ <\$200K core funding³ ▪ 1 demographic group ▪ 1 office ▪ 1 county ▪ No pro bono 	<ul style="list-style-type: none"> ▪ ~25+ FTEs ▪ \$200K–550K core funding ▪ 1–2 offices/clinics ▪ 1–2 counties ▪ Pro bono and/or student volunteers 	<ul style="list-style-type: none"> ▪ ~100+ FTEs ▪ >\$1.5M core funding ▪ Multiple offices/clinics ▪ Multiple counties ▪ Pro bono 	<ul style="list-style-type: none"> ▪ <15 FTEs ▪ \$200K–550K core funding ▪ Fully remote ▪ Statewide ▪ Pro bono

APPROACH

Live Poll

Which archetype is the closest fit for describing your organization?

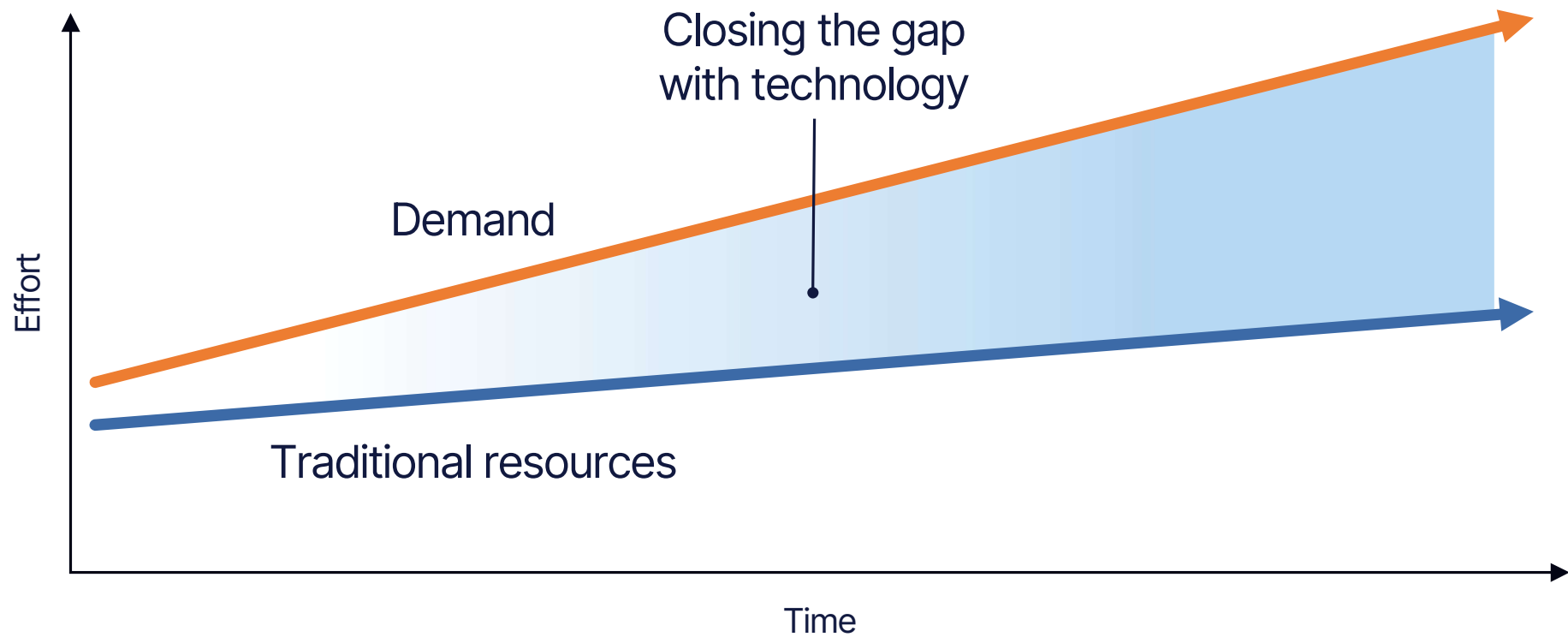
Small QLSP ¹	Small – Medium QLSP & LSCP ²	Large QLSP	Support Center
Archetype 1	Archetype 2	Archetype 3	Archetype 4
<ul style="list-style-type: none"> ▪ ~15–20 FTEs ▪ <\$200K core funding ▪ 1 demographic group ▪ 1 office ▪ 1 county ▪ No pro bono 	<ul style="list-style-type: none"> ▪ ~25+ FTEs ▪ \$200K–550K core funding ▪ 1–2 offices/clinics ▪ 1–2 counties ▪ Pro bono and/or student volunteers 	<ul style="list-style-type: none"> ▪ ~100+ FTEs ▪ >\$1.5M core funding ▪ Multiple offices/clinics ▪ Multiple counties ▪ Pro bono 	<ul style="list-style-type: none"> ▪ <15 FTEs ▪ \$200K–550K core funding ▪ Fully remote ▪ Statewide ▪ Pro bono

HARB(■)R

Findings

FINDINGS

Macro View of Opportunity




FINDINGS

AI as Transformative Force Multiplier



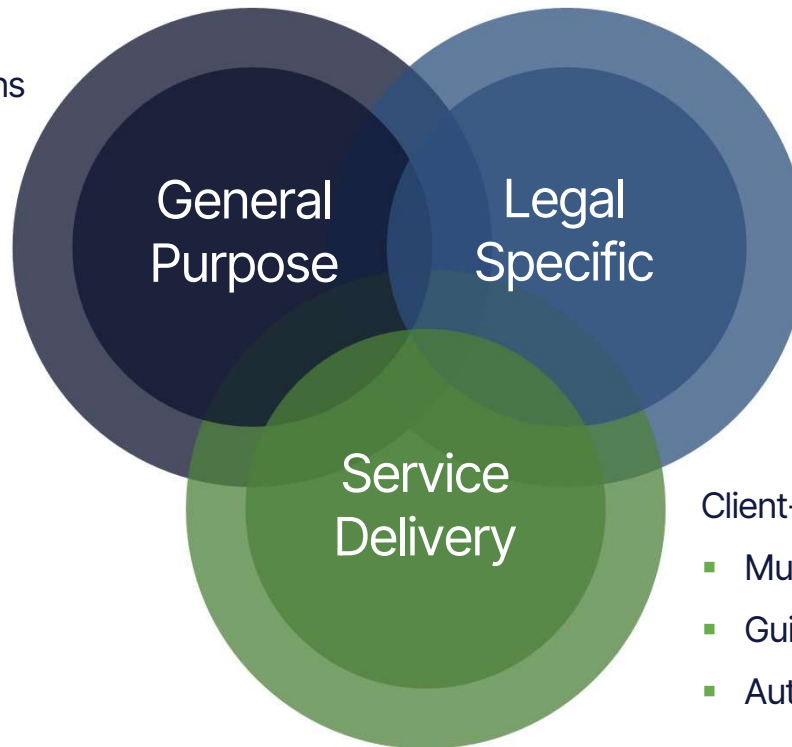
- Reduce administrative burdens
- Increase speed and consistency of information delivery
- Process massive amounts of information quickly
- Provide expedient summarization and analysis
- Facilitate real time language translation
- Support scalable self-help resources

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

FINDINGS

Key Areas of Focus

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



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

Client-facing tools including:

- Multilingual chatbots
- Guided interviews
- Automated document generation

FINDINGS

Priority Areas and Common Needs



Document prep and review (with automation)



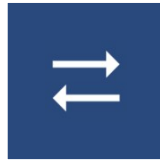
Client communication and follow-up (admin)



Intake, triage, and screening



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



Cross-system integration



Knowledge Management tools

FINDINGS

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

FINDINGS

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



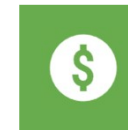
Data security & privacy



Accuracy



Ethical considerations (e.g., UPL)



Cost



Ease of use

FINDINGS

Live Poll

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

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



Accuracy



Ethical considerations (e.g., UPL)



Cost



Ease of use

1

2

3

4

5

Not
consistent

Somewhat
inconsistent

Neutral

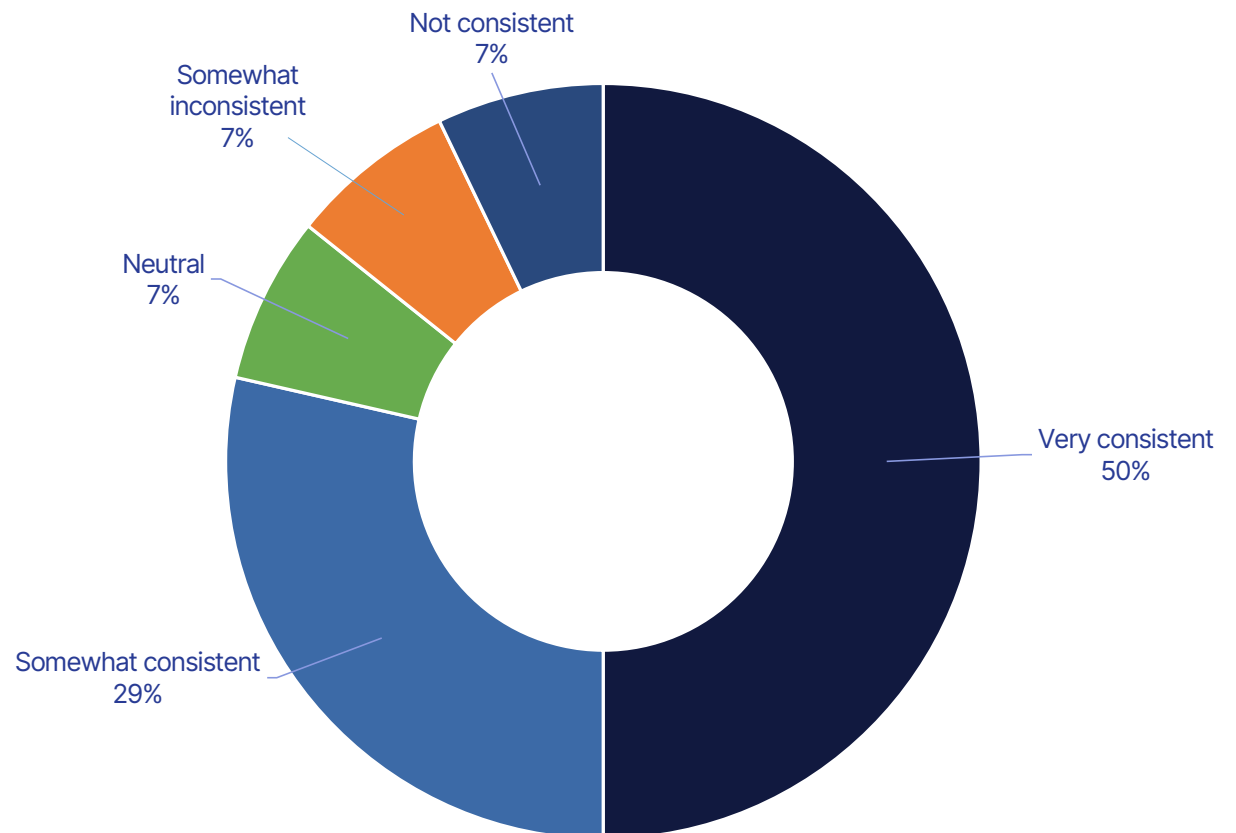
Somewhat
consistent

Very
consistent

FINDINGS

Live Poll Results

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



HARB(■)R

Recommendations

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

RECOMMENDATION

OA&I Structure and Governance

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	
	<div><div><div>Invest in Centralized Strategic Leadership</div><div>OA&I</div><div><ul style="list-style-type: none">Hire a centralized strategic leader to coordinate collective resource developmentTargeted group enhancement and support of the collectiveTailored individual support through office hours, lightweight consulting, etc.</div></div><div><div>Establish Governance Structure</div><div>OA&I</div><div><ul style="list-style-type: none">Establishment of a Legal Technology Advisory working groupGuidance and review of strategic technology roadmapClear direction and accountability channels</div></div></div>

RECOMMENDATIONS

Live Poll

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

Invest in Centralized Strategic Leadership*OA&I*

- 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

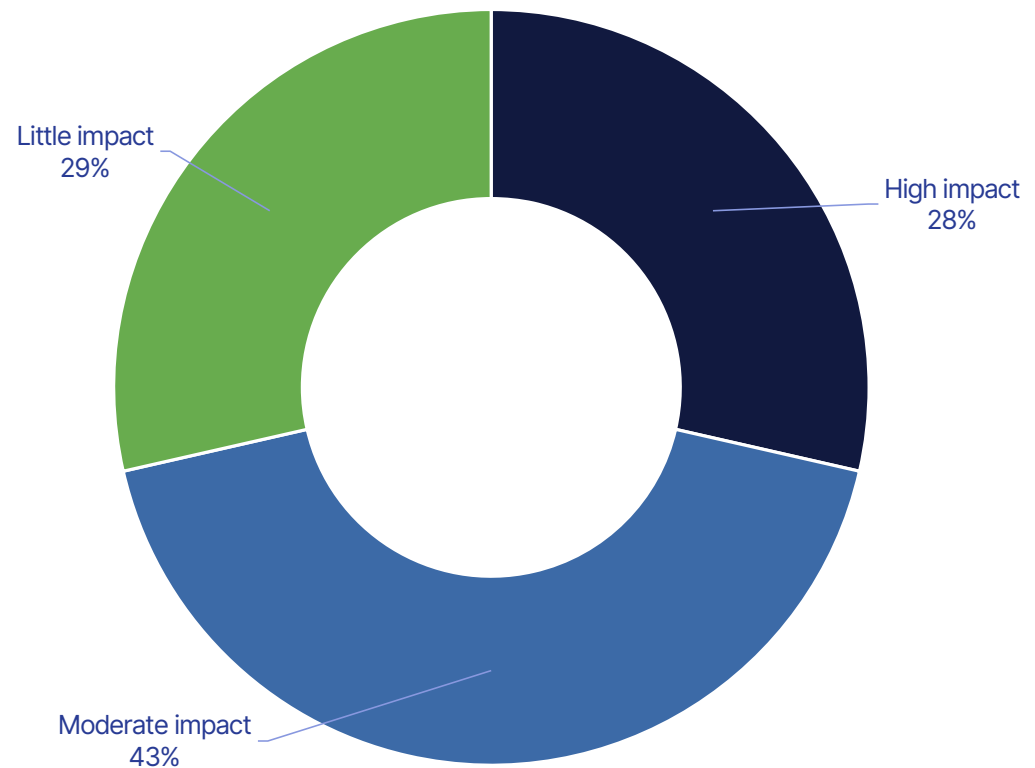


FINDINGS

Live Poll Results

OA&I Structure and Governance

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



RECOMMENDATIONS

AI Models & Frameworks

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	
	<p>Establish an AI x A2J Maturity Model</p> <p><i>OA&I</i></p> <ul style="list-style-type: none"> ▪ 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
	<p>Develop AI Risk Management Framework</p> <p><i>OA&I with Legal Ethics and AI Subject Matter Experts</i></p> <ul style="list-style-type: none"> ▪ 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
	<p>Establish Mapping and Measures Model</p> <p><i>OA&I with Mission Advancement & Accountability Division (MAAD) Support</i></p> <ul style="list-style-type: none"> ▪ 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

RECOMMENDATIONS

Live Poll

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

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

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

Establish Mapping and Measures Model

OA&I with 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

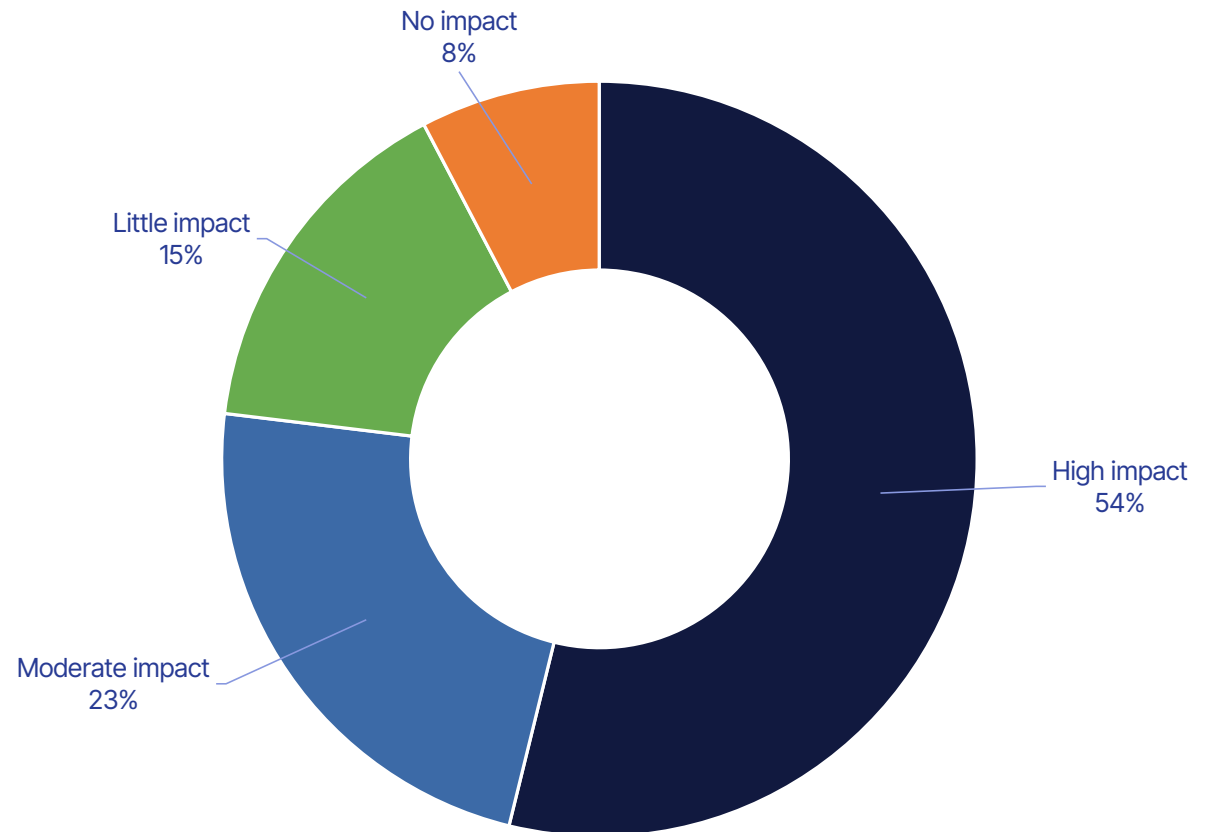


FINDINGS

Live Poll Results

AI Models & Frameworks

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



RECOMMENDATIONS

Key Supplier Network



RECOMMENDATIONS

Live Poll

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

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

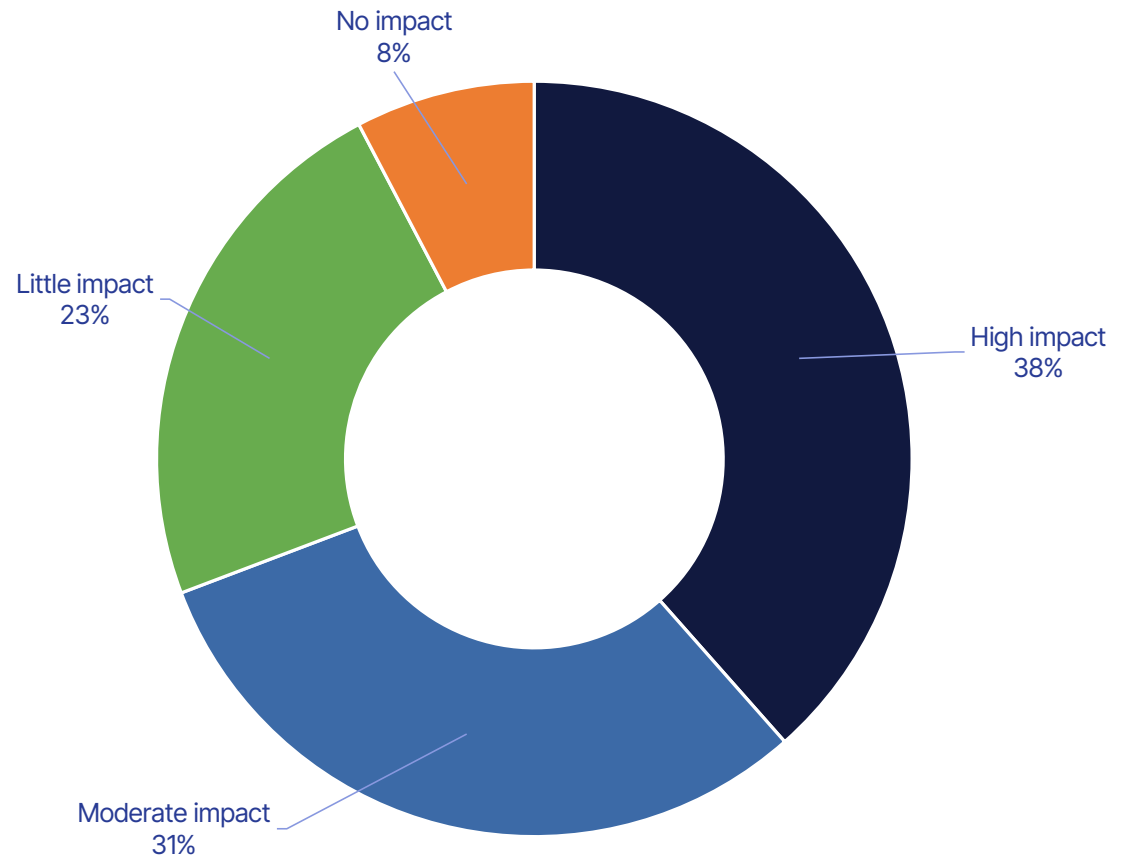


FINDINGS

Live Poll Results

Key Supplier Network

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



RECOMMENDATIONS

Resource & Network Sharing

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	

Establish a Resource Sharing Platform <i>OA&I</i>	<ul style="list-style-type: none"> Centralized resource-sharing platform for templates, training materials, process, documentation, and technical resources Response to identified pain point of resource duplication resulting in drain of resources
Establish a Champion Network <i>OA&I with designated grantee leads</i>	<ul style="list-style-type: none"> Network of technology champions across organizations to create a sustainable ecosystem Enable and encourage knowledge sharing, peer support, problem solving, and advocacy for technology adoption Identify and empower individuals within grantee organizations who demonstrate aptitude and enthusiasm for technology innovation
Establish Community of Practice Development <i>OA&I</i>	<ul style="list-style-type: none"> Community of Practice will facilitate collaborative learning environment Structured peer-learning opportunities for knowledge sharing, collaborative problem-solving, mentorship, and innovation sharing Evolving knowledge base that survives staff turnover and preserves institutional learning

RECOMMENDATIONS

Live Poll

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

Establish a Resource Sharing Platform

OA&I

- Centralized resource-sharing platform for templates, training materials, process, documentation, and technical resources
- Response to identified pain point of resource duplication resulting in drain of resources

Establish a Champion Network

OA&I with designated grantee leads

- Network of technology champions across organizations to create a sustainable ecosystem
- Enable and encourage knowledge sharing, peer support, problem solving, and advocacy for technology adoption
- Identify and empower individuals within grantee organizations who demonstrate aptitude and enthusiasm for technology innovation

Establish Community of Practice Development

Tech Transformation Lead

- Community of Practice will facilitate collaborative learning environment
- Structured peer-learning opportunities for knowledge sharing, collaborative problem-solving, mentorship, and innovation sharing
- Evolving knowledge base that survives staff turnover and preserves institutional learning

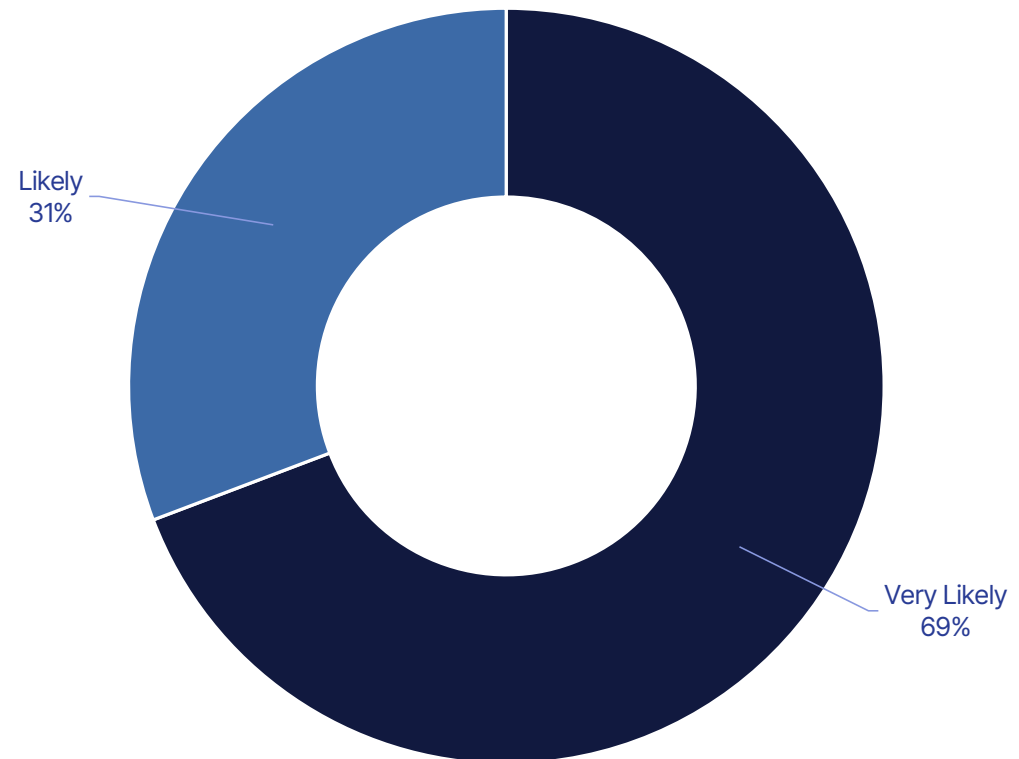


FINDINGS

Live Poll Results

Resource & Network Sharing

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



RECOMMENDATIONS

Live Poll

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

Establish a Resource Sharing Platform

OA&I

- Centralized resource-sharing platform for templates, training materials, process, documentation, and technical resources
- Response to identified pain point of resource duplication resulting in drain of resources

Establish a Champion Network

OA&I with designated grantee leads

- Network of technology champions across organizations to create a sustainable ecosystem
- Enable and encourage knowledge sharing, peer support, problem solving, and advocacy for technology adoption
- Identify and empower individuals within grantee organizations who demonstrate aptitude and enthusiasm for technology innovation

Establish Community of Practice Development

Tech Transformation Lead

- Community of Practice will facilitate collaborative learning environment
- Structured peer-learning opportunities for knowledge sharing, collaborative problem-solving, mentorship, and innovation sharing
- Evolving knowledge base that survives staff turnover and preserves institutional learning

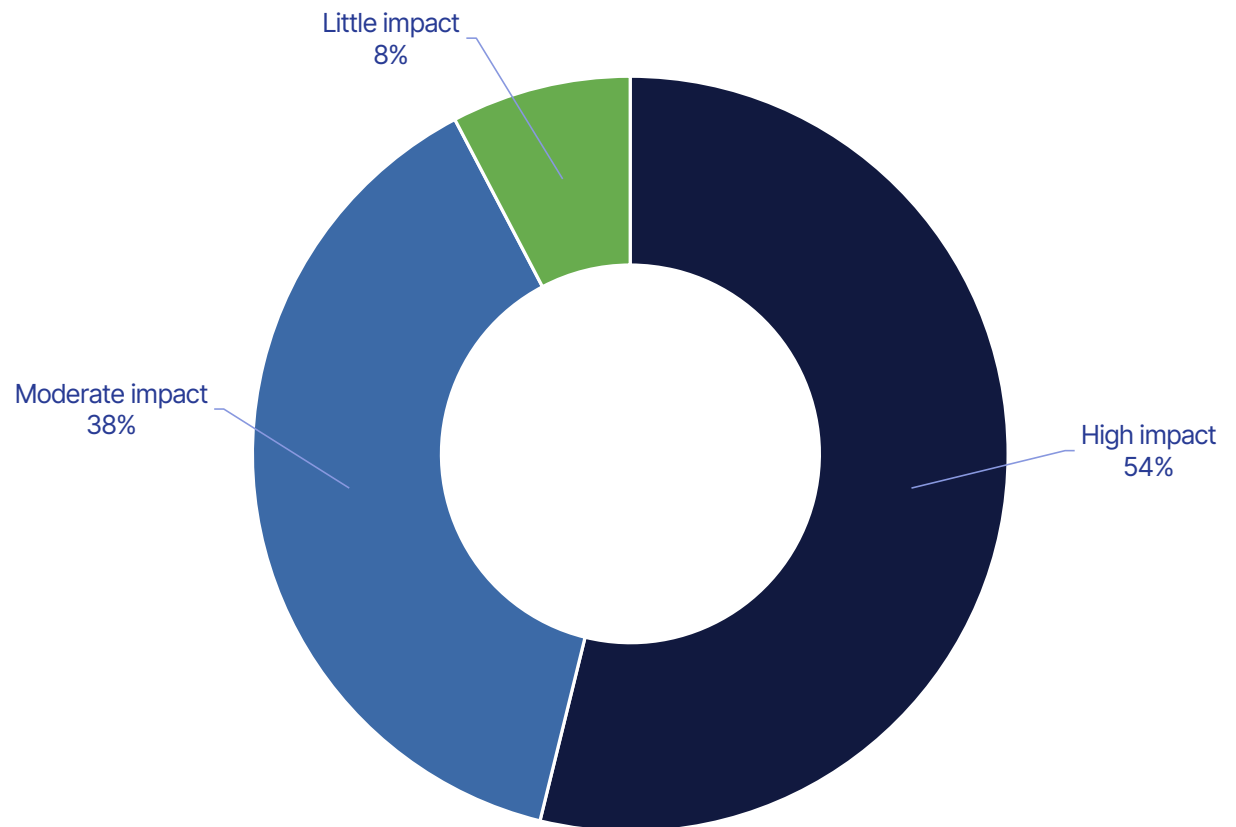


FINDINGS

Live Poll Results

Resource & Network Sharing

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



RECOMMENDATIONS

People Resources & Training

OA&I Structure and Governance	
AI Models & Frameworks	
Key Supplier Network	
Resource & Network Sharing	
People Resources & Training	<div><div><div>Develop Training and Capacity Building Framework</div><div>OA&I with Education Partners</div></div><div><ul style="list-style-type: none">▪ 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</div></div>
Future Innovation Systems	<div><div><div>Develop Role-Based Technology Adoption Plans</div><div>OA&I</div></div><div><ul style="list-style-type: none">▪ 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</div></div>
Tech-Enabled Pro Bono Engagement	

RECOMMENDATIONS

Live Poll

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

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 (the grantees Tech Lead

- 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

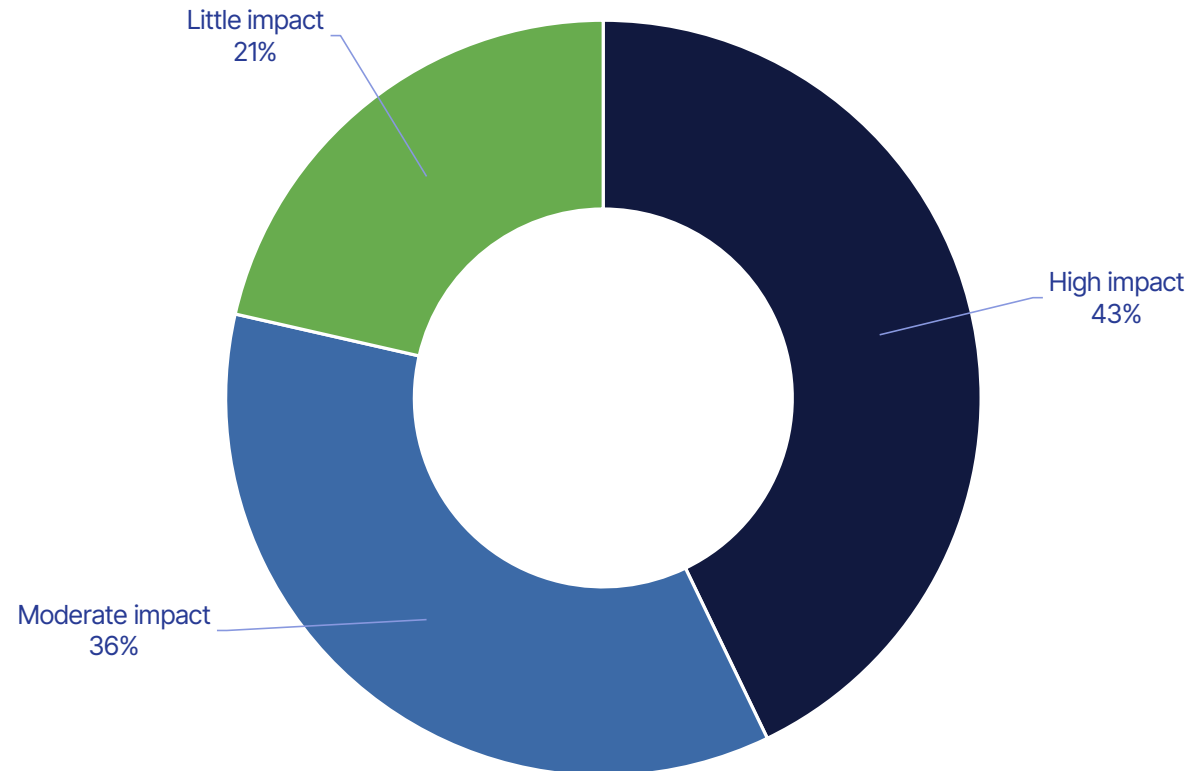


FINDINGS

Live Poll Results

People Resources & Training

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



RECOMMENDATIONS

Future Innovation Systems

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	

Foster Simple Data Sharing and System Connections <i>OA&I with Technical Specialists and vendors</i>	<ul style="list-style-type: none"> ▪ 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 <i>OA&I with Legal Tech Advisory working group</i>	<ul style="list-style-type: none"> ▪ 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

RECOMMENDATIONS

Live Poll

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

Foster Simple Data Sharing and System Connections <i>OA&I with Technical Specialists and vendors</i>	<ul style="list-style-type: none">▪ 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 <i>OA&I with Legal Tech Advisory working group</i>	<ul style="list-style-type: none">▪ 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

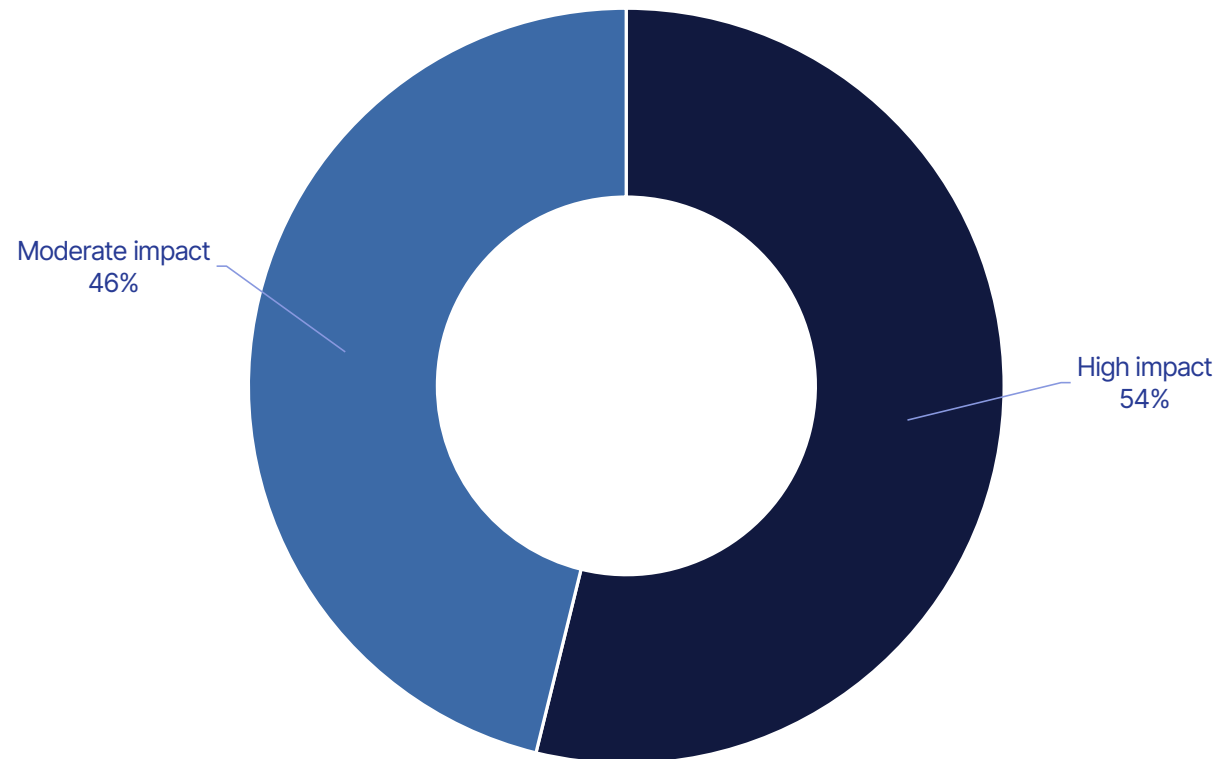


FINDINGS

Live Poll Results

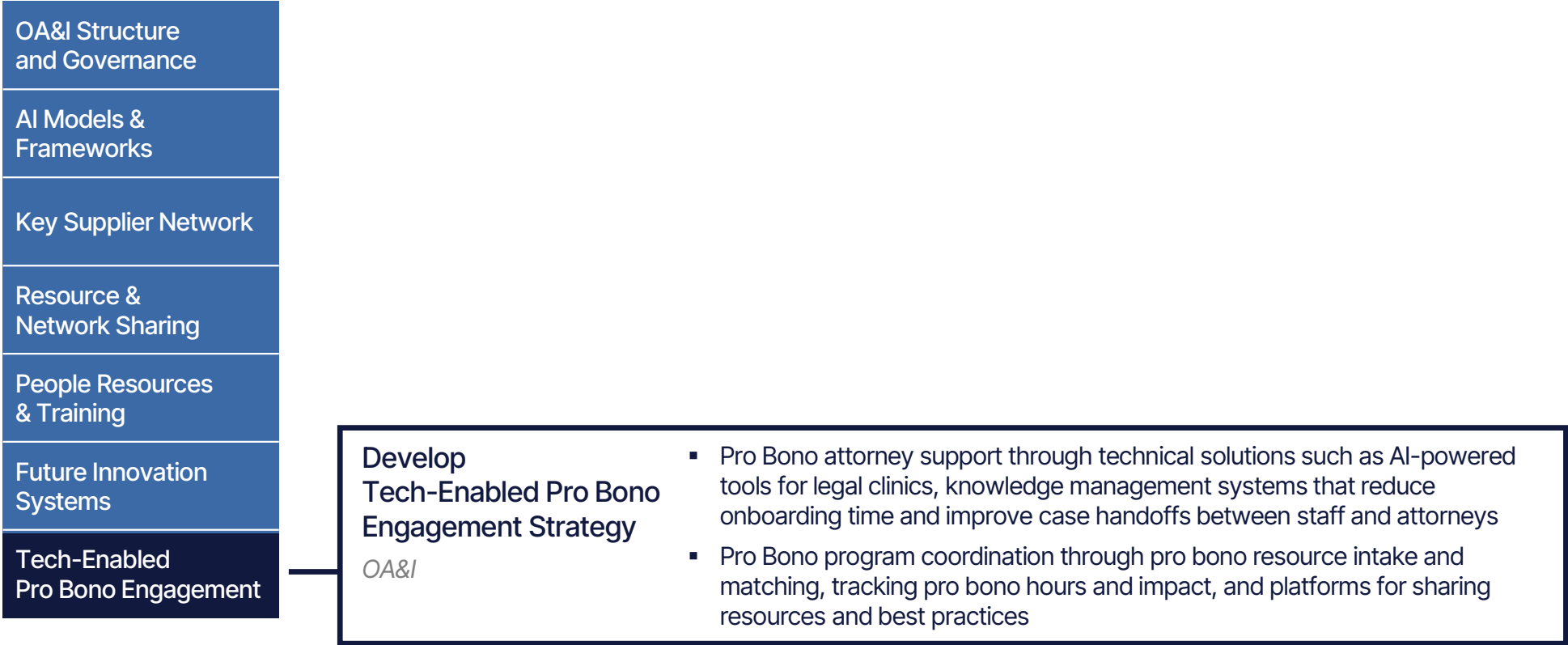
Future Innovation Systems

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



RECOMMENDATIONS

Tech-Enabled Pro Bono Engagement



RECOMMENDATIONS

Live Poll

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

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 improve 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

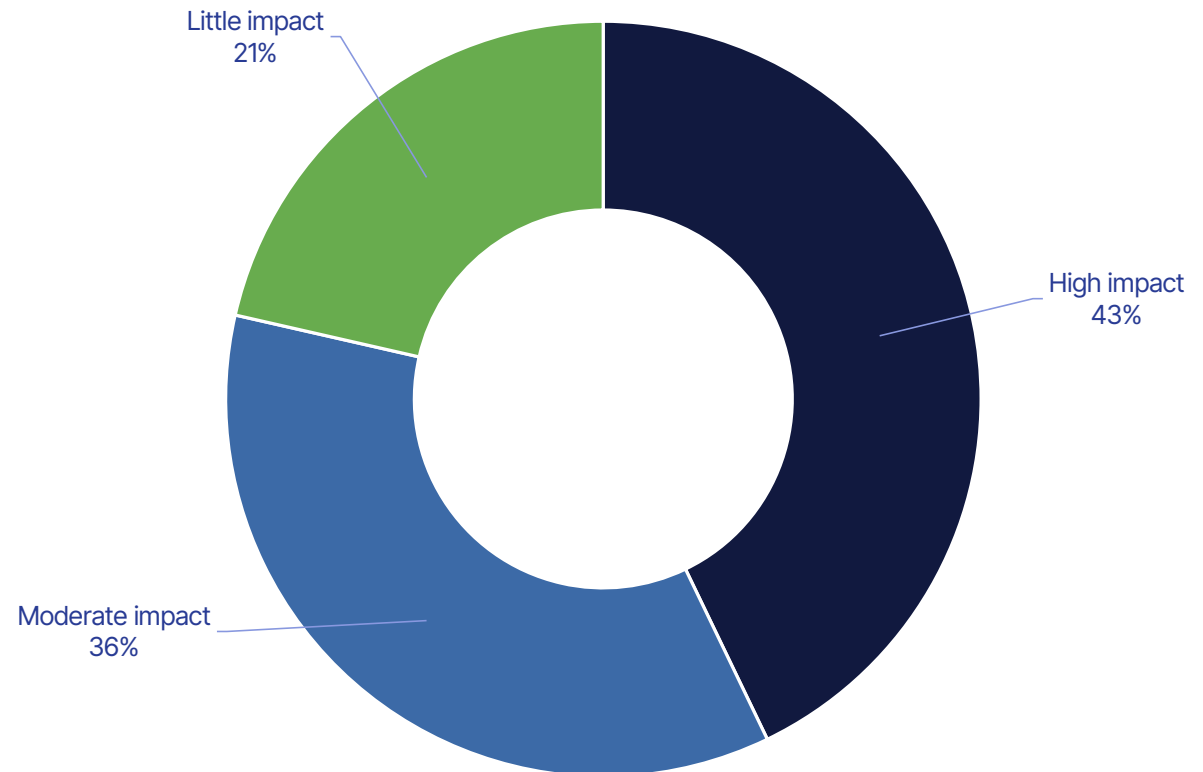


FINDINGS

Live Poll Results

Tech-Enabled Pro Bono Engagement

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



RECOMMENDATIONS

Live Poll

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

Use your mouse to re-order the six areas in order of
priority for your organization.

FINDINGS

Live Poll Results

How would you
prioritize these six
areas of
recommendations?

Recommendation Areas in Order of Aggregate Prioritization	Ranked 1 st	Ranked 2 nd	Ranked 3 rd	Ranked 4 th	Ranked 5 th	Ranked 6 th
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

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
- Collating & analyzing responses

Roadmap Development

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

Data collection

Strength of insights

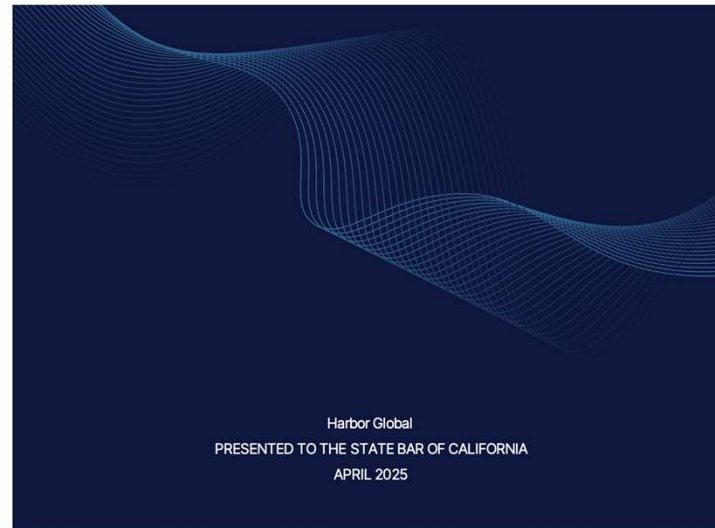
RECOMMENDATIONS

Next Steps and Discussion



Scaling Access to Justice: A Legal Tech Blueprint

Defining, launching, and sustaining a strategic Legal Tech Initiative to provide technical assistance to California grantees statewide.



Harbor Global
PRESENTED TO THE STATE BAR OF CALIFORNIA
APRIL 2025



The State Bar of California

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

Jennifer Zelnick, Lead Program Analyst, Office of Access & Inclusion
Justin Hectus, Managing Director, Harbor Labs

PDI Committee Meeting, May 6, 2025

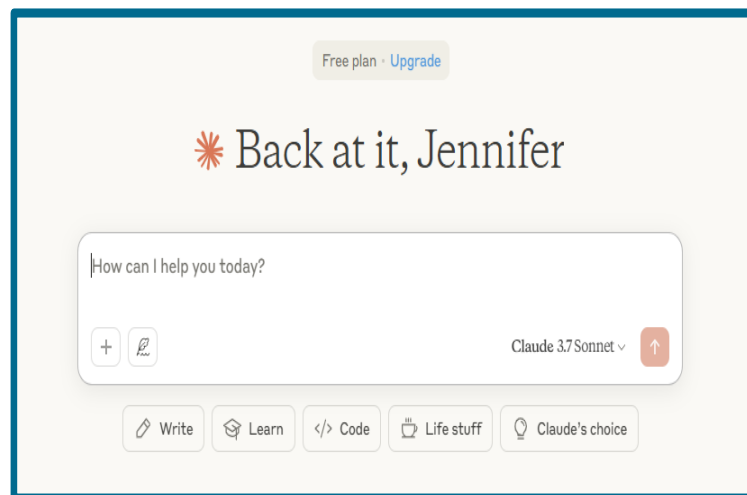
Agenda

- 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



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.

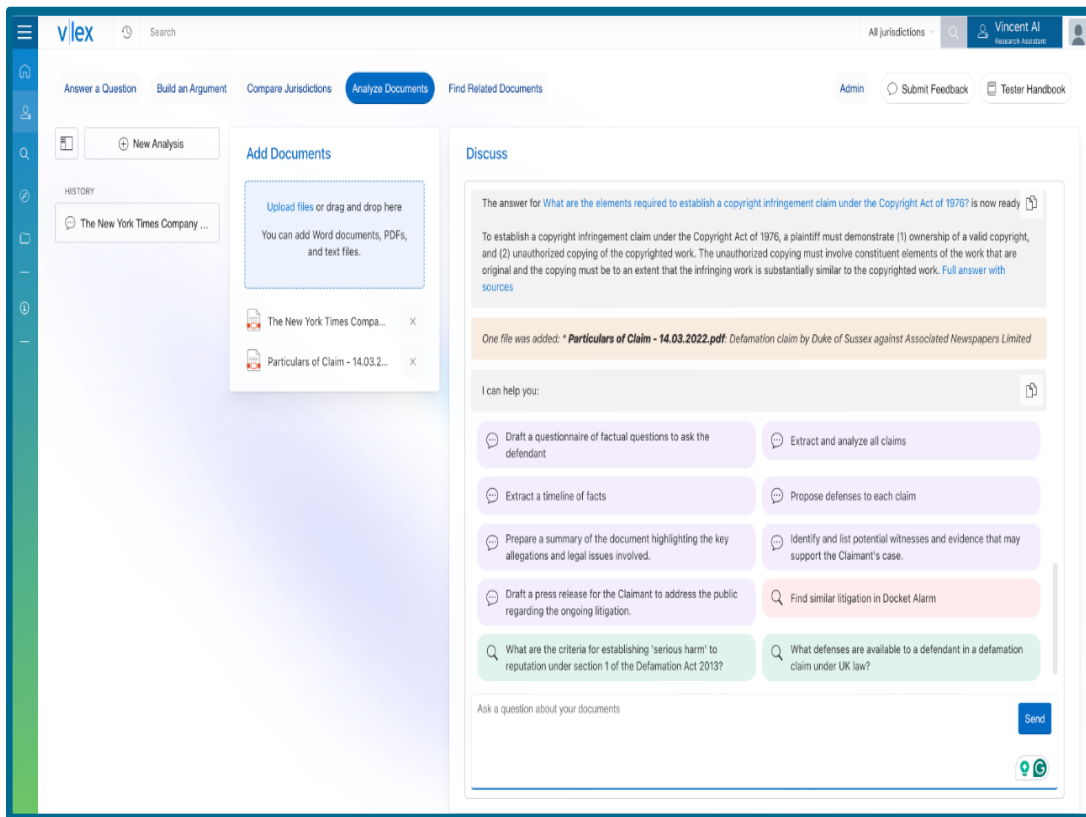


This is an image of Claude's interface.



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.



Connecting Legal Technology and GenAI 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.
- 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.



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.



OA&I's Major Legal Tech and GenAI Initiatives

October 2023 Emerging Trends to Expand
Access to Justice Convening

CoCounsel

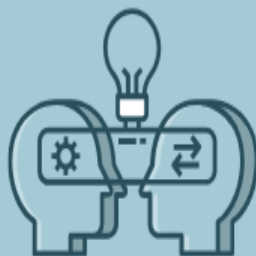
2023

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



The State Bar of California

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

HARB(■)R

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

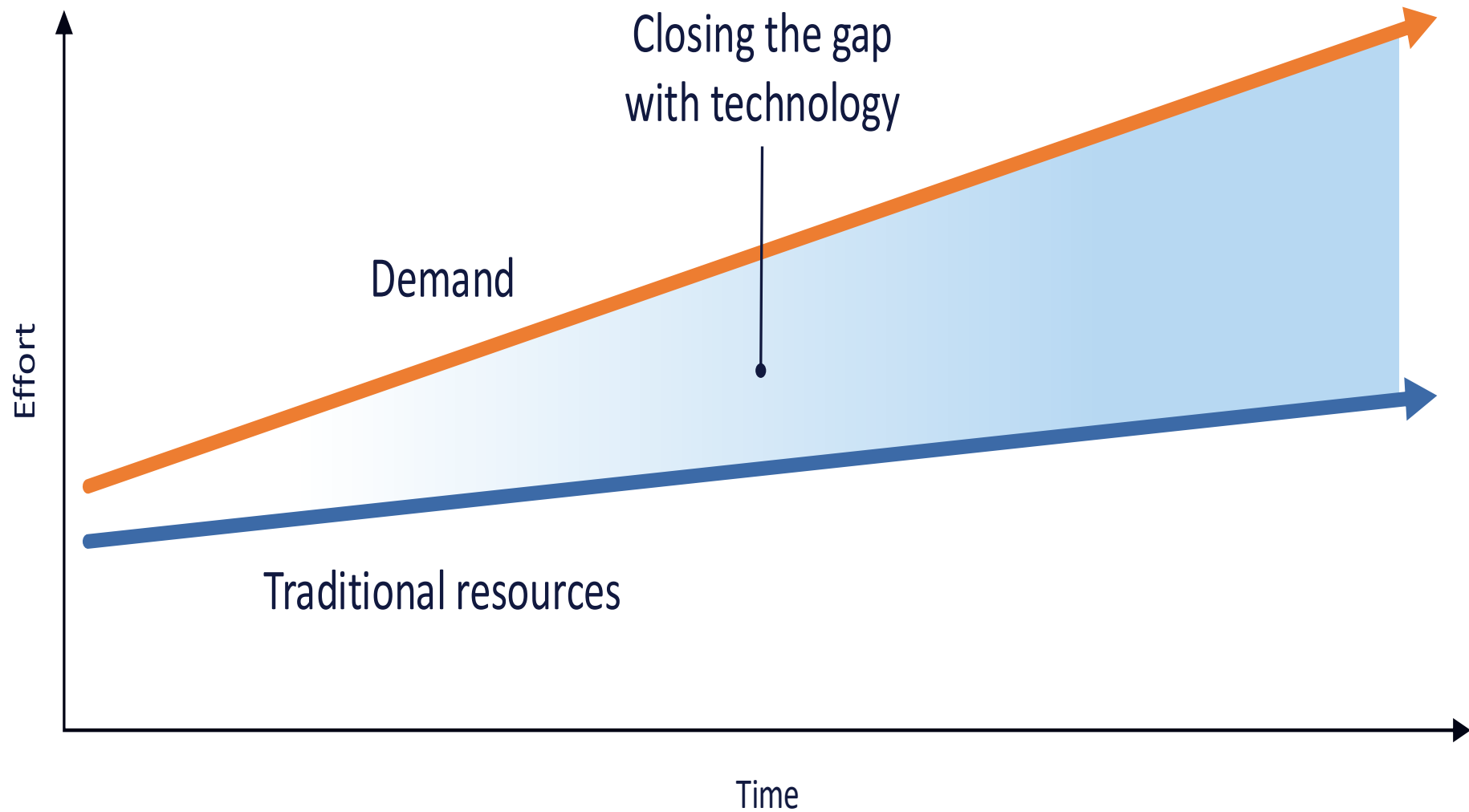
We recognize that the State Bar grantee organizations are not the same size, shape and makeup. Throughout this process our recommendations have been generalized and validated for fit and application with four archetypes of organizations.

Small QLSP ¹	Small – Medium QLSP & LSCP ²	Large QLSP	Support Center
Archetype 1	Archetype 2	Archetype 3	Archetype 4
<ul style="list-style-type: none"> ▪ ~15–20 FTEs ▪ <\$200K core funding ▪ 1 demographic group ▪ 1 office ▪ 1 county ▪ No pro bono 	<ul style="list-style-type: none"> ▪ ~25+ FTEs ▪ \$200K–550K core funding ▪ 1–2 offices/clinics ▪ 1–2 counties ▪ Pro bono and/or student volunteers 	<ul style="list-style-type: none"> ▪ ~100+ FTEs ▪ >\$1.5M core funding ▪ Multiple offices/clinics ▪ Multiple counties ▪ Pro bono 	<ul style="list-style-type: none"> ▪ <15 FTEs ▪ \$200K–550K core funding ▪ Fully remote ▪ Statewide ▪ Pro bono

HARB(■)R

Findings

Macro View of Opportunity



AI as Transformative Force Multiplier

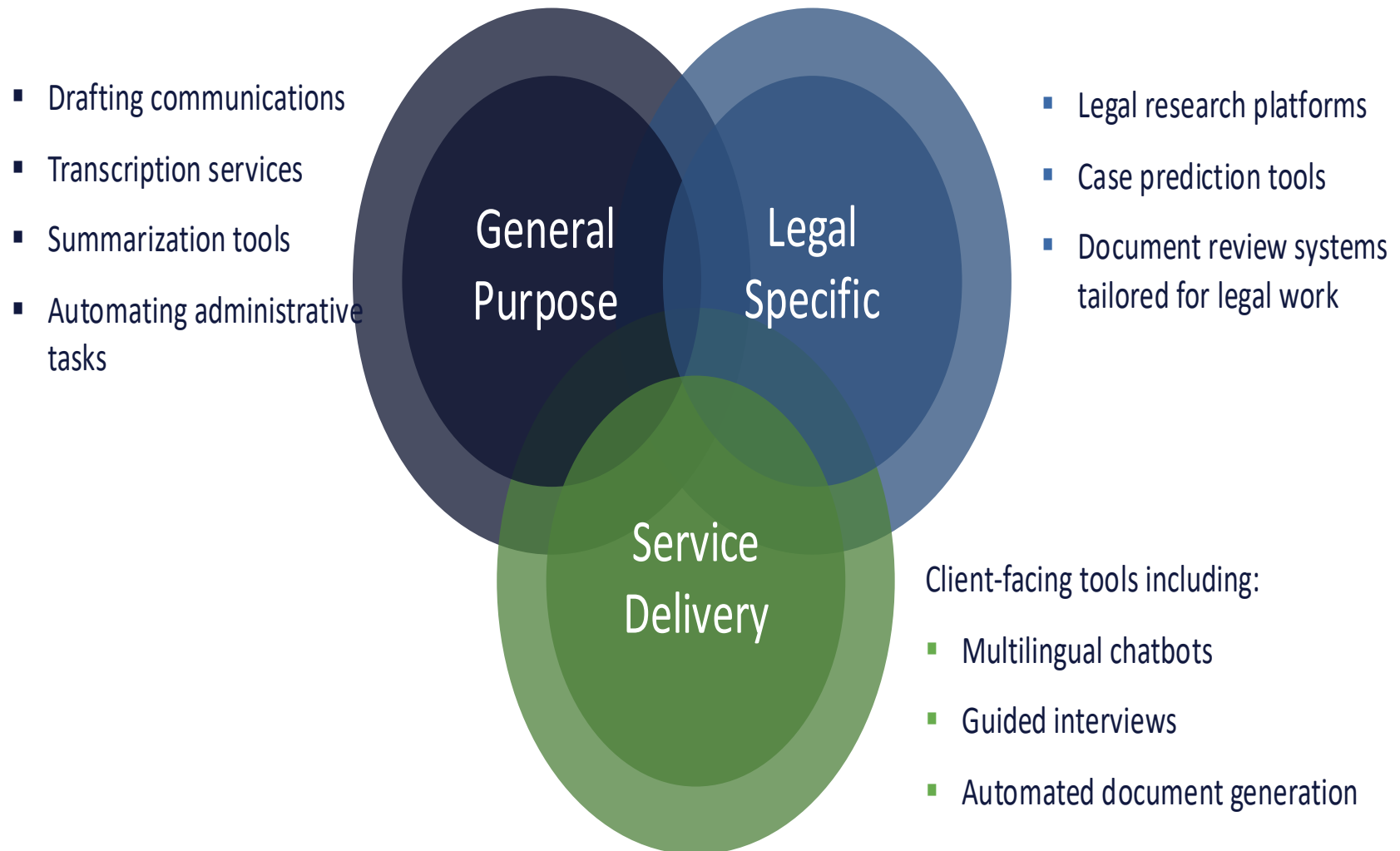


- Reduce administrative burdens
- Increase speed and consistency of information delivery
- Process massive amounts of information quickly
- Provide expedient summarization and analysis
- Facilitate real time language translation
- Support scalable self-help resources



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

Key Areas of Focus



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

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



Accuracy



Ethical considerations (e.g., UPL)



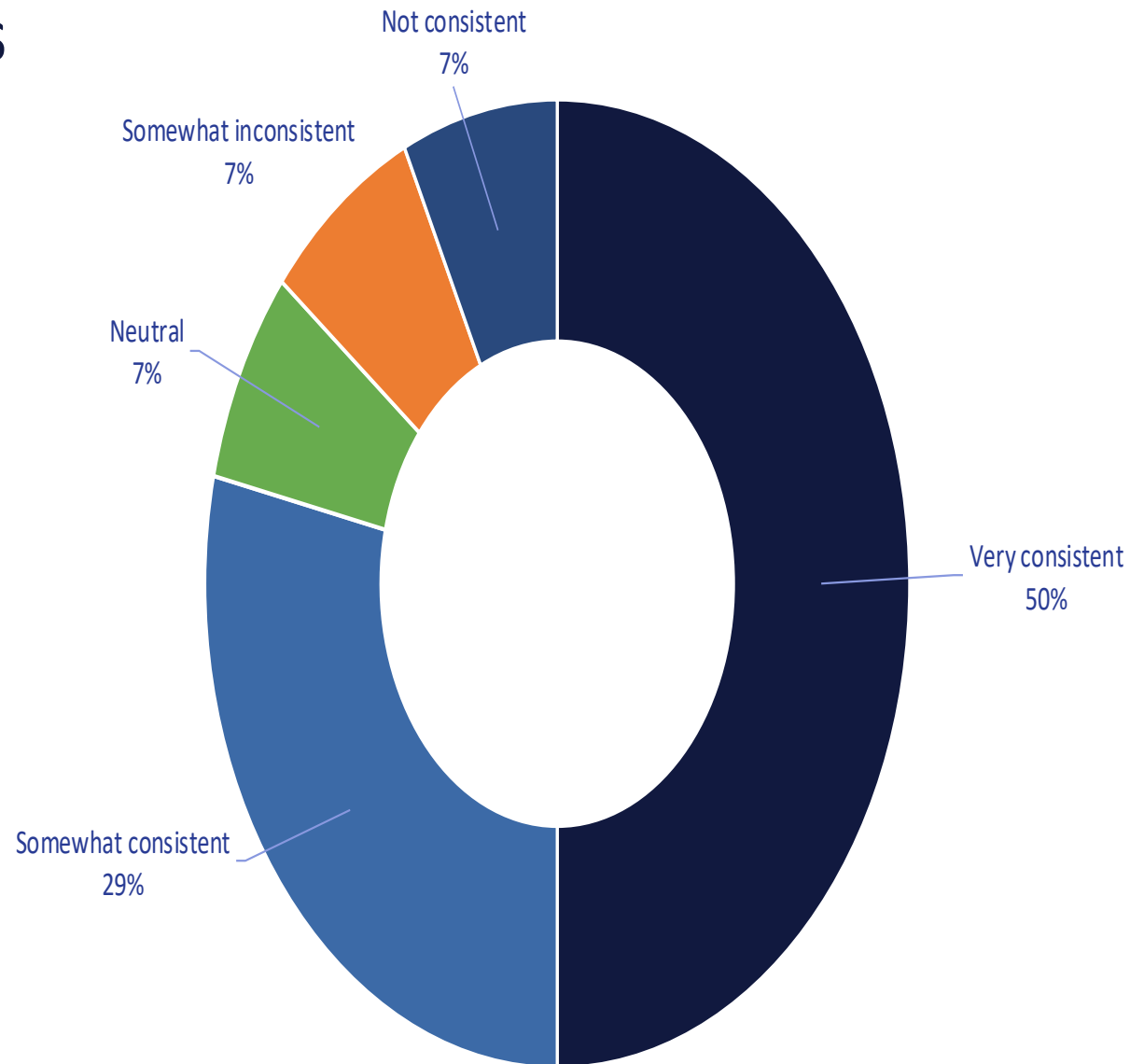
Cost



Ease of use

April 4 Grantee Poll Results

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



HARB(■)R

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

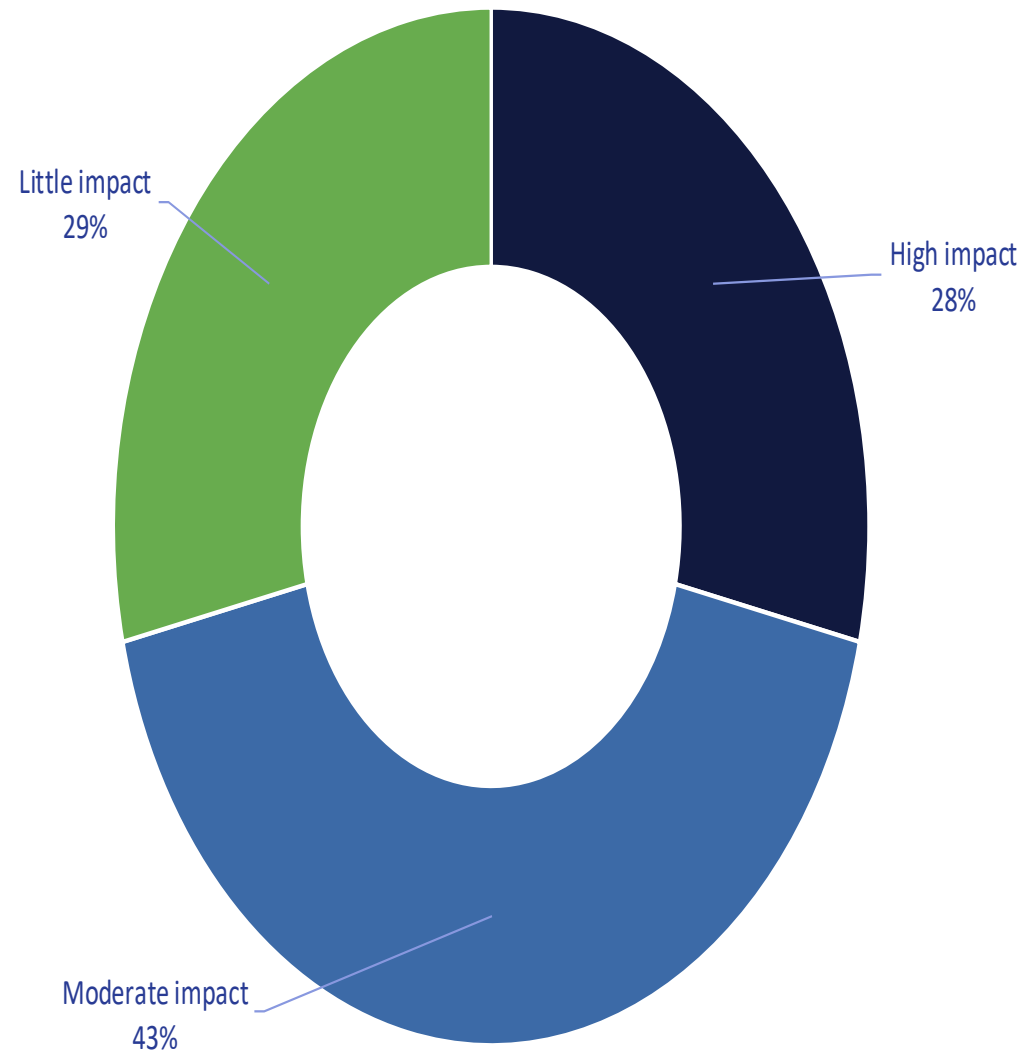
OA&I Structure and Governance

OA&I Structure and Governance	Invest in Centralized Strategic Leadership	<ul style="list-style-type: none"> ▪ 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.
AI Models & Frameworks	OA&I	
Key Supplier Network	Establish Governance Structure	<ul style="list-style-type: none"> ▪ Establishment of a Legal Technology Advisory working group ▪ Guidance and review of strategic technology roadmap ▪ Clear direction and accountability channels
Resource & Network Sharing	OA&I	
People Resources & Training		
Future Innovation Systems		
Tech-Enabled Pro Bono Engagement		

April 4 Grantee Poll Results

OA&I Structure and Governance

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



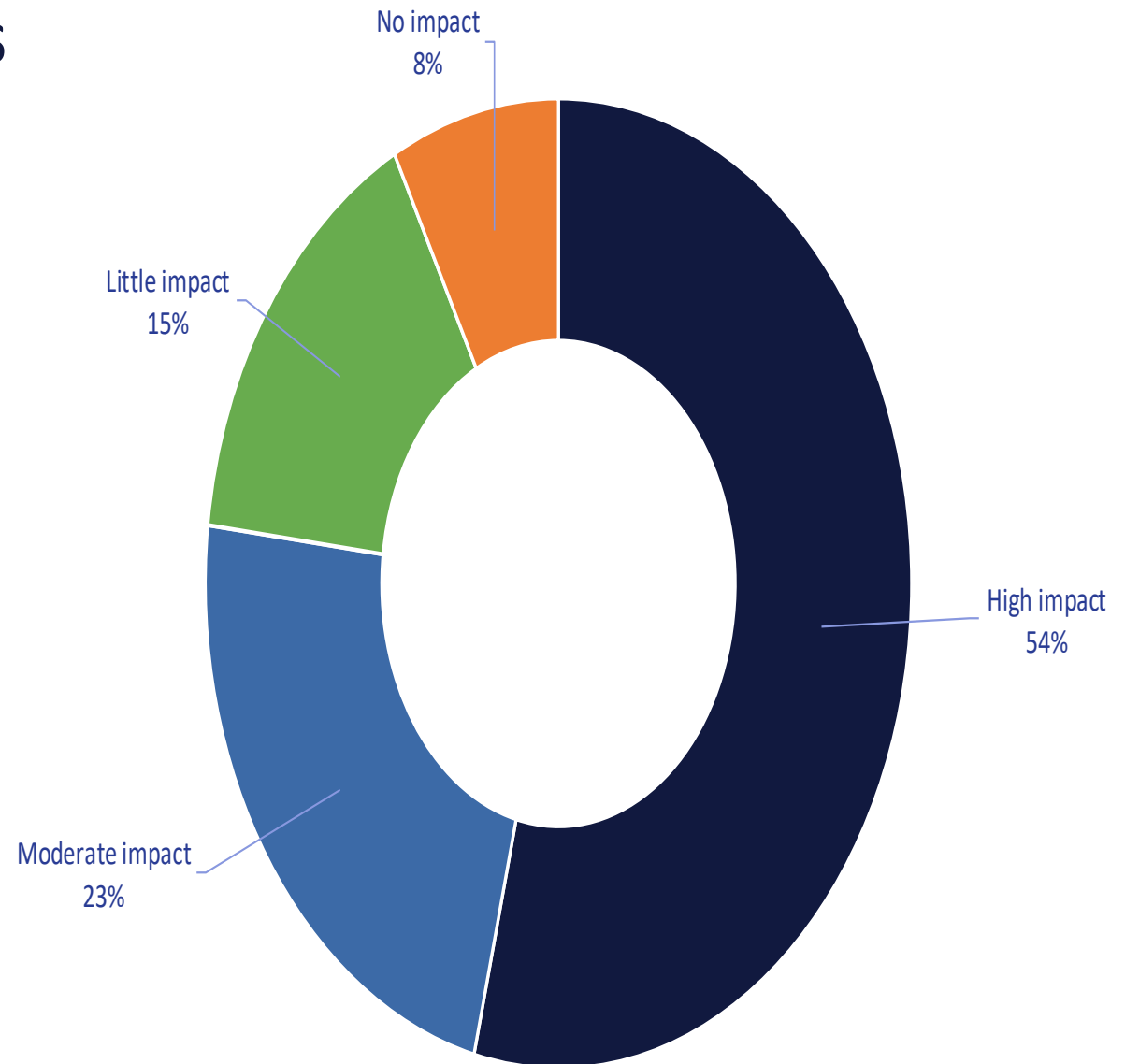
AI Models & Frameworks

OA&I Structure and Governance	
AI Models & Frameworks	<p>Establish an AI x A2J Maturity Model</p> <p><i>OA&I</i></p> <ul style="list-style-type: none"> 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
Key Supplier Network	
Resource & Network Sharing	<p>Develop AI Risk Management Framework</p> <p><i>OA&I with Legal Ethics and AI Subject Matter Experts</i></p> <ul style="list-style-type: none"> 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
People Resources & Training	
Future Innovation Systems	
Tech-Enabled Pro Bono Engagement	<p>Establish Mapping and Measures Model</p> <p><i>OA&I with Mission Advancement & Accountability Division (MAAD) Support</i></p> <ul style="list-style-type: none"> 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

April 4 Grantee Poll Results

AI Models & Frameworks

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



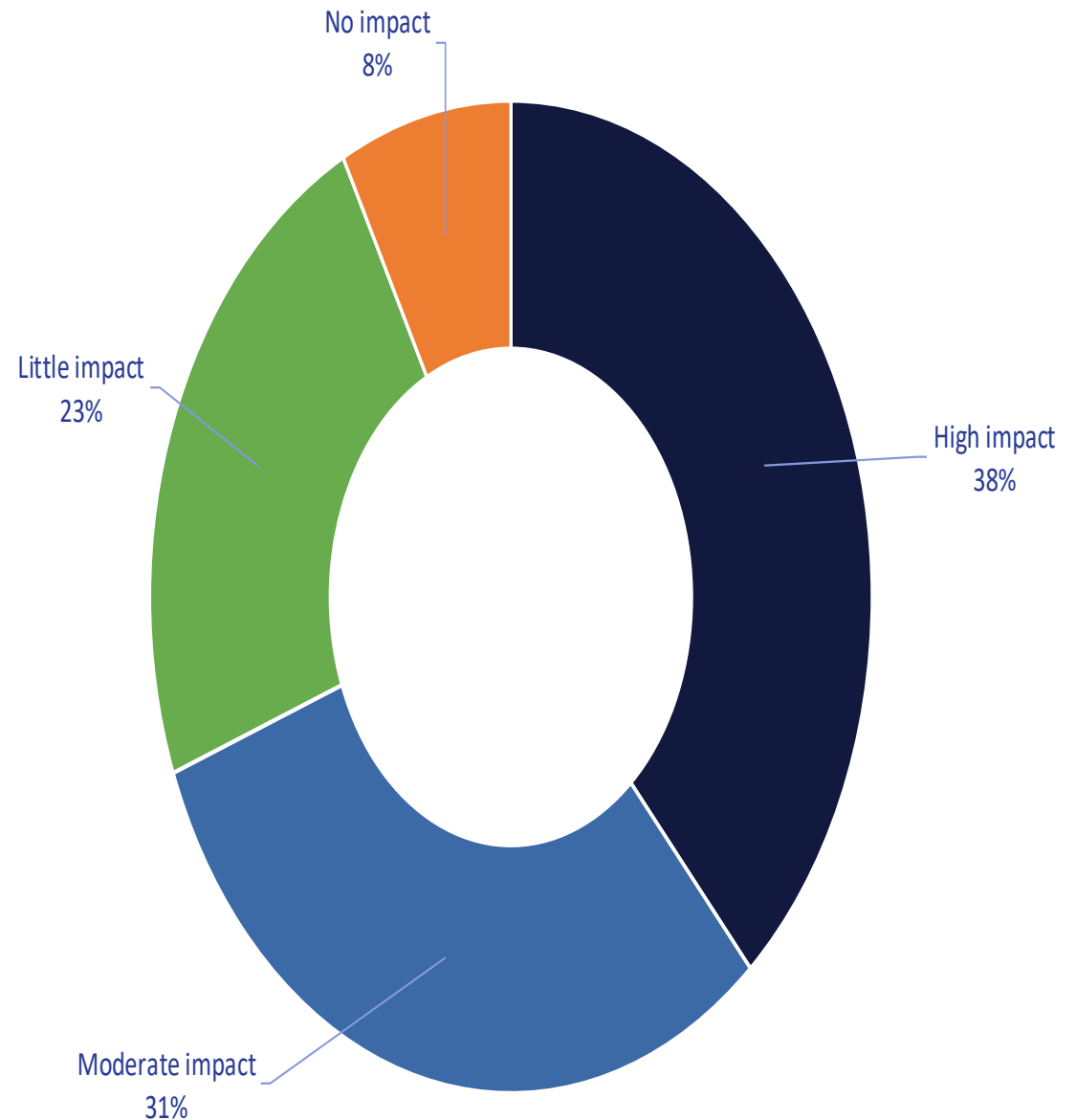
Key Supplier Network



April 4 Grantee Poll Results

Key Supplier Network

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



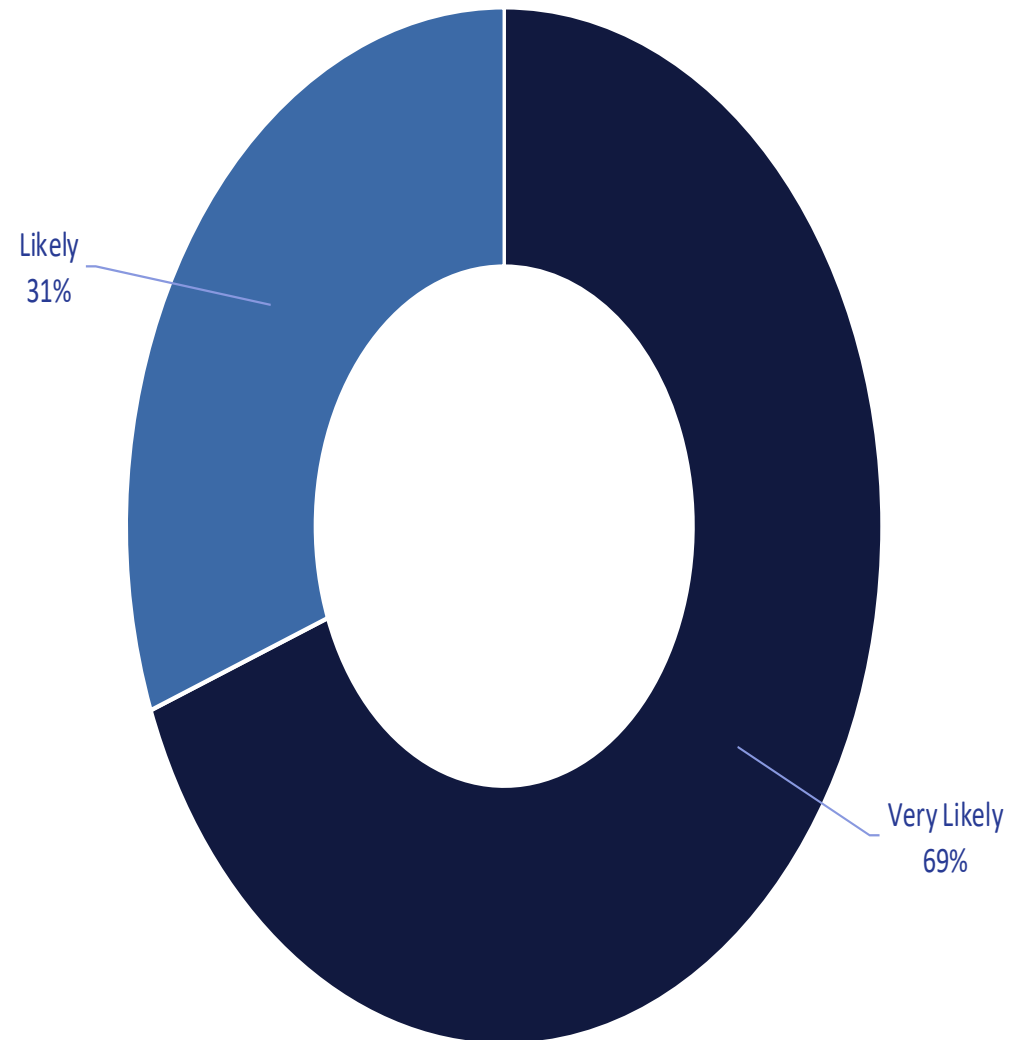
Resource & Network Sharing

OA&I Structure and Governance	
AI Models & Frameworks	
Key Supplier Network	
Resource & Network Sharing	<div> <div> Establish a Resource Sharing Platform </div> <div> <i>OA&I</i> </div> <div> <ul style="list-style-type: none"> Centralized resource-sharing platform for templates, training materials, process, documentation, and technical resources Response to identified pain point of resource duplication resulting in drain of resources </div> </div>
People Resources & Training	<div> <div> Establish a Champion Network </div> <div> <i>OA&I with designated grantee leads</i> </div> <div> <ul style="list-style-type: none"> Network of technology champions across organizations to create a sustainable ecosystem Enable and encourage knowledge sharing, peer support, problem solving, and advocacy for technology adoption Identify and empower individuals within grantee organizations who demonstrate aptitude and enthusiasm for technology innovation </div> </div>
Future Innovation Systems	<div> <div> Establish Community of Practice Development </div> <div> <i>OA&I</i> </div> <div> <ul style="list-style-type: none"> Community of Practice will facilitate collaborative learning environment Structured peer-learning opportunities for knowledge sharing, collaborative problem-solving, mentorship, and innovation sharing Evolving knowledge base that survives staff turnover and preserves institutional learning </div> </div>
Tech-Enabled Pro Bono Engagement	

April 4 Grantee Poll Results

Resource & Network Sharing

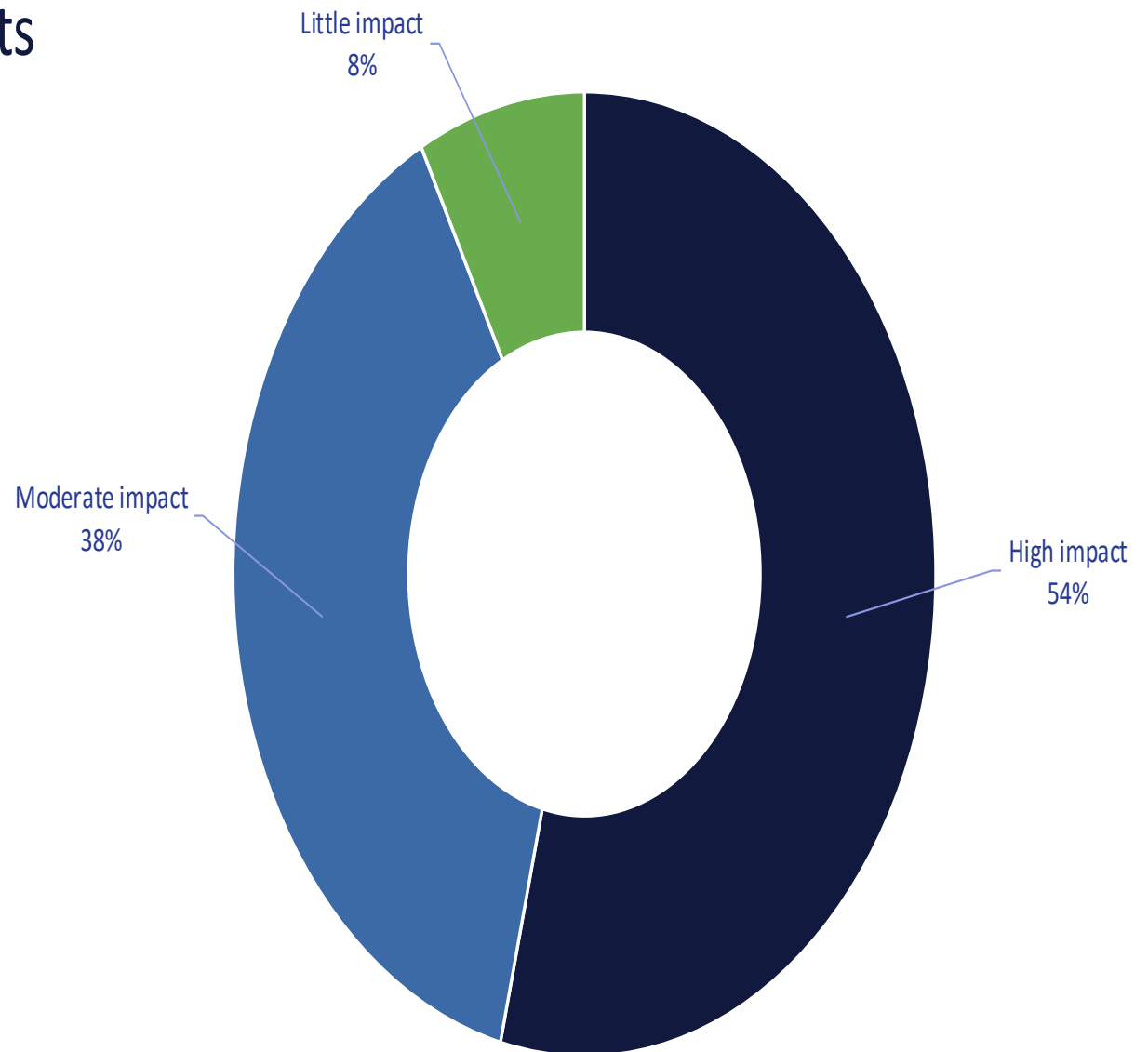
How likely is your
organization to
participate in at least
one of these initiatives?



April 4 Grantee Poll Results

Resource & Network Sharing

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



People Resources & Training

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 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

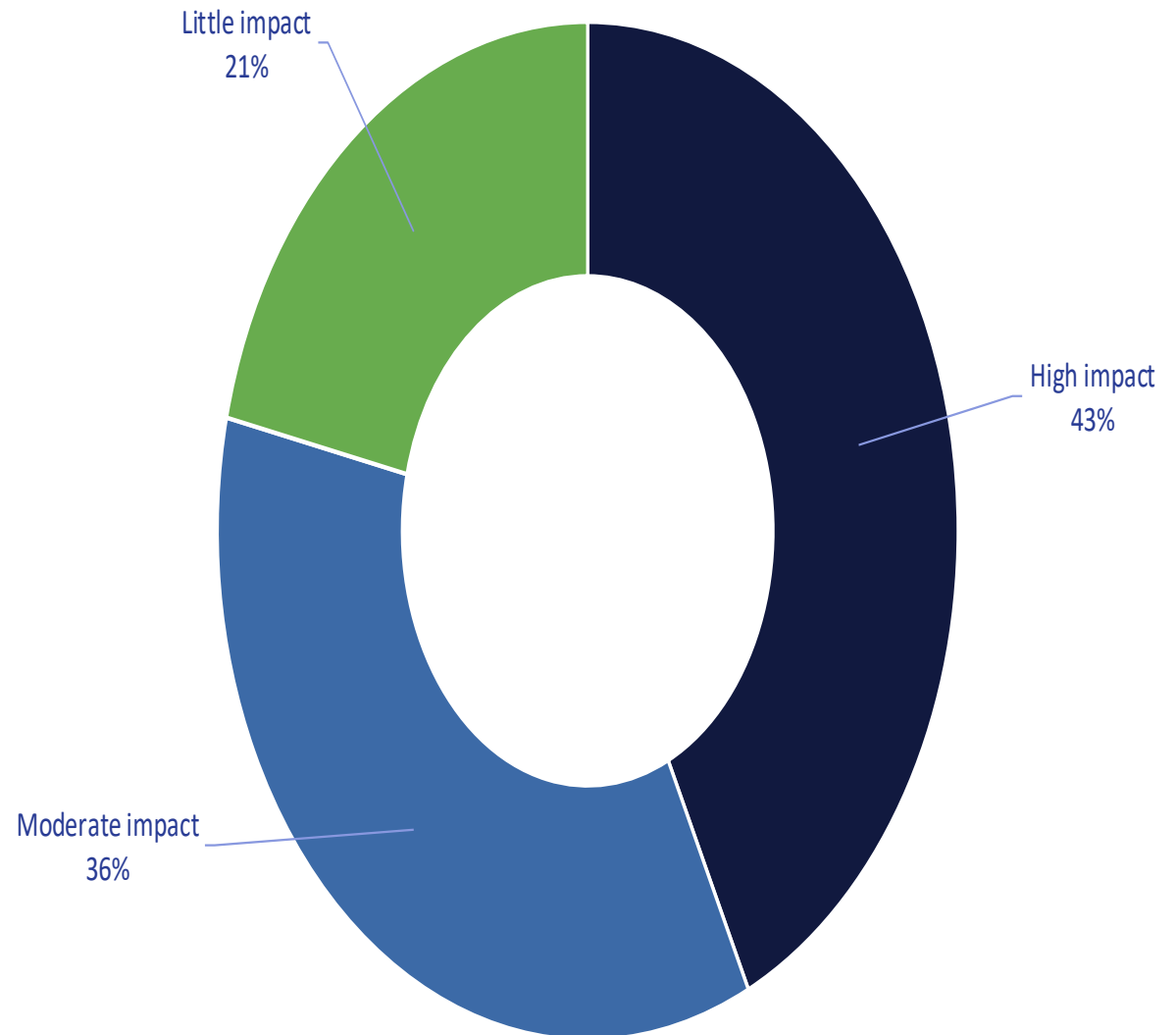
OA&I

- 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?



Future Innovation Systems

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

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

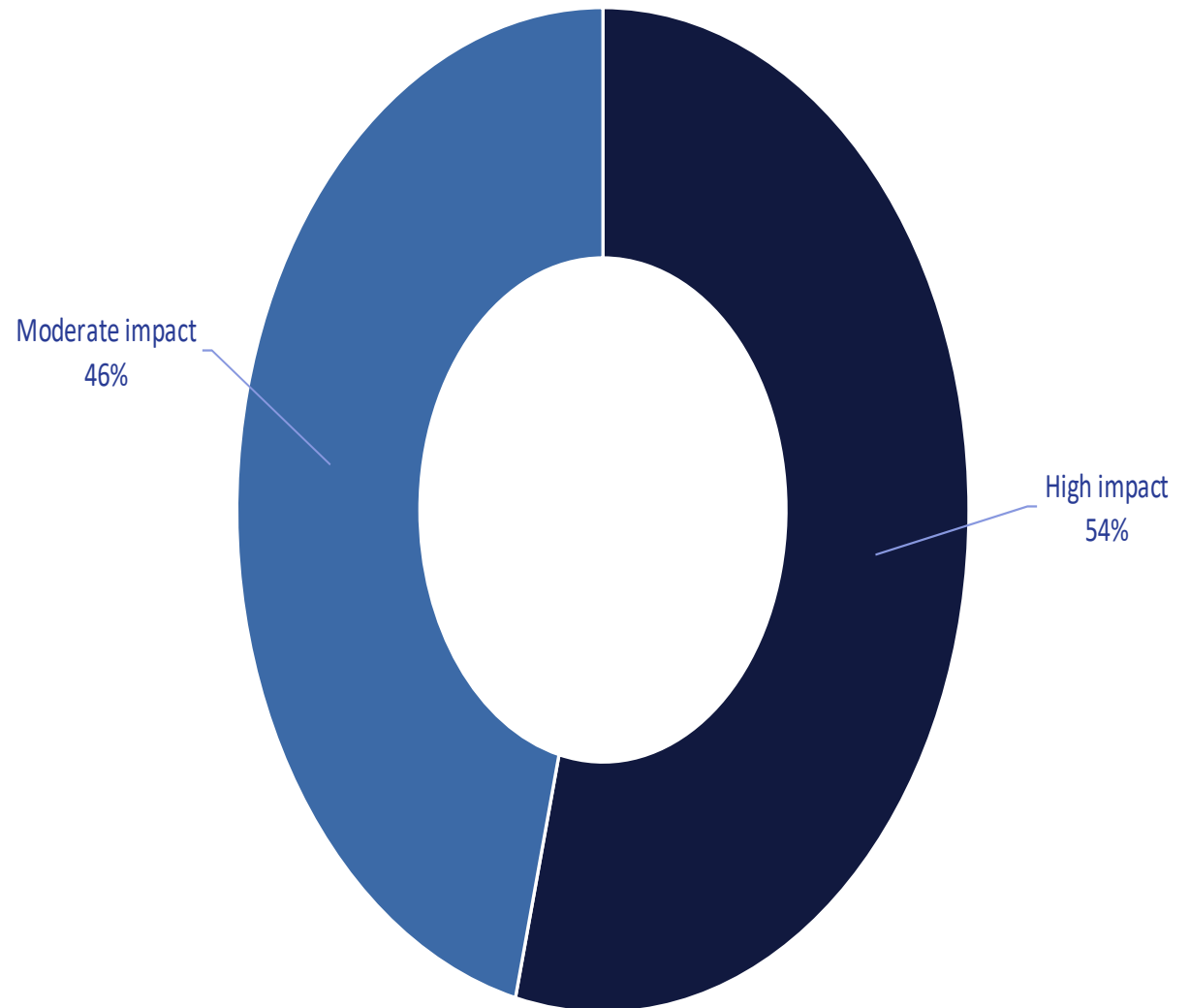
*OA&I with
Legal Tech Advisory working
group*

- 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?



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

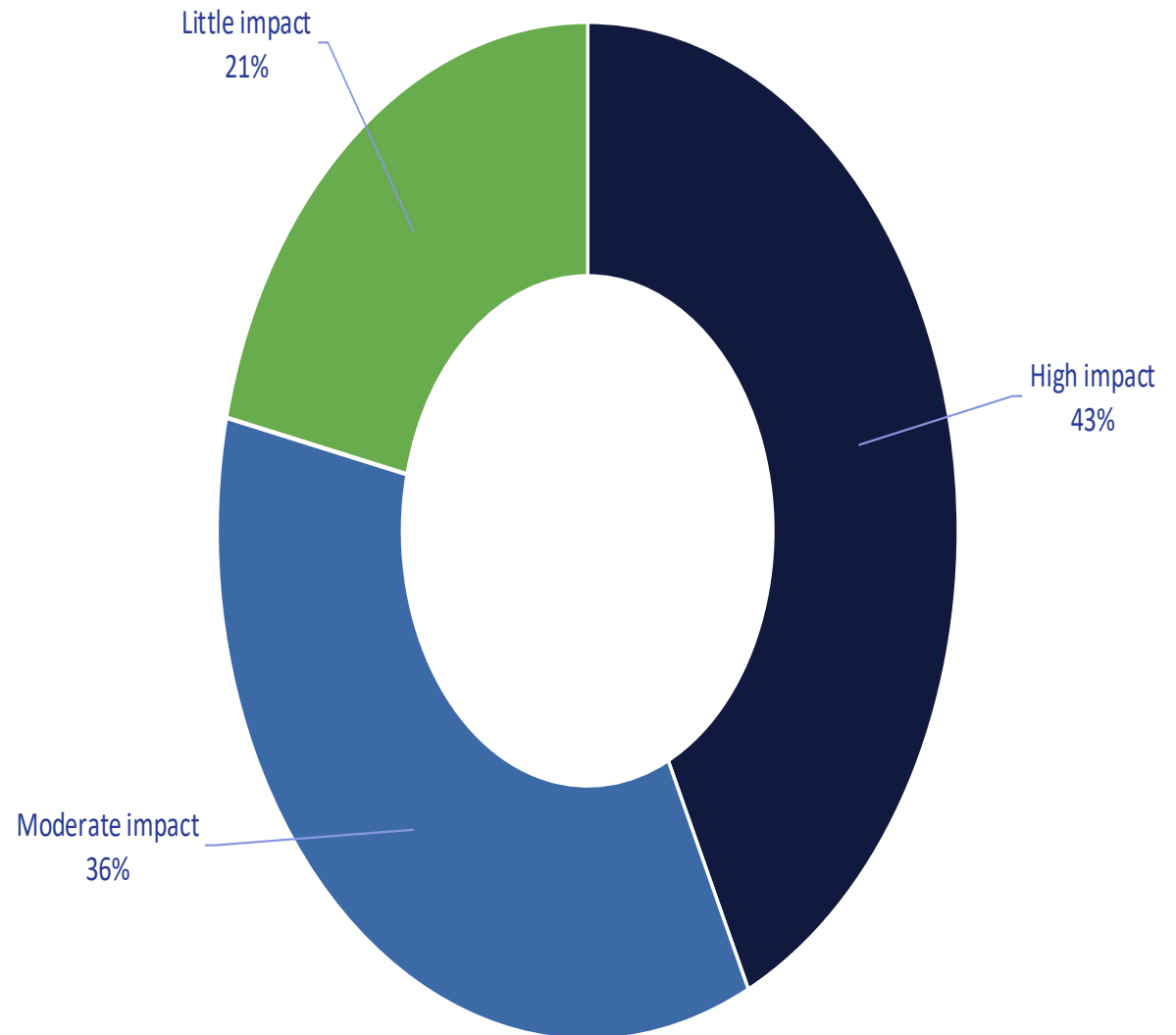
OA&I

- 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?



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

No
impact

2

Little
impact

3

Moderate
impact

4

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

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

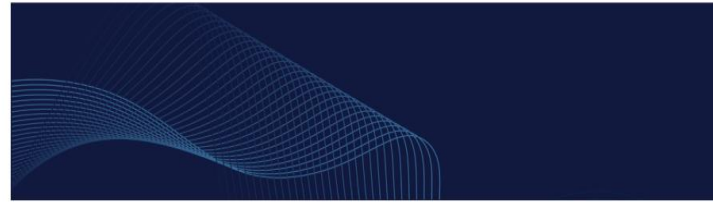
Roadmap Development

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

Data collection

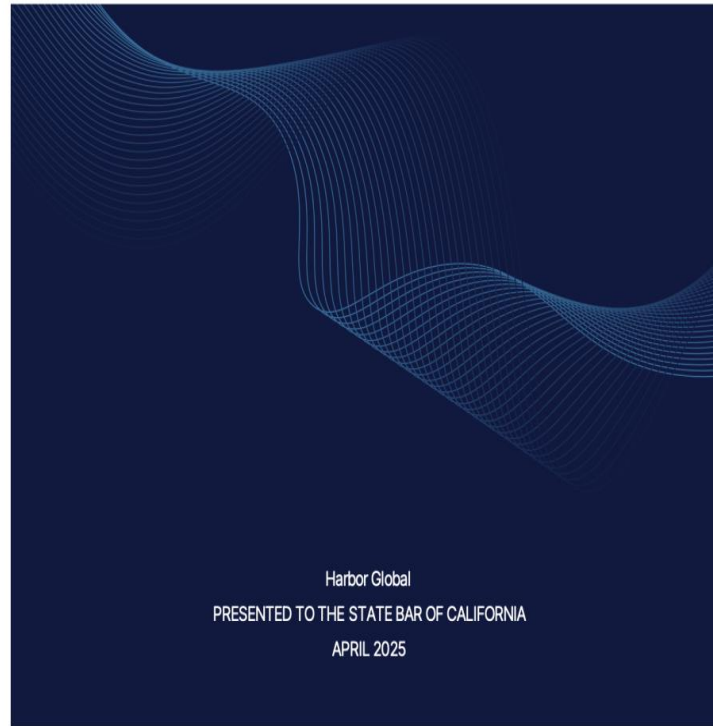
Strength of insights

Next Steps and Discussion



Scaling Access to Justice: A Legal Tech Blueprint

Defining, launching, and sustaining a strategic Legal Tech Initiative to provide technical assistance to California grantees statewide.





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.



Question and Answer



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.



The State Bar of California