



W S B C

WESTERN STATES BAR CONFERENCE

WELCOME to Day Two



thank you

Sponsors

Platinum Level



Silver Level



Bronze Level



Supporting Sponsor



Agenda

- Sponsor Recognition
- Clio Demonstration
Miquela Anzulovich – Affinity Partnership Mgr
- NCBP UPDATE
Patrick Palace – President
- Roll Call of States: SD, NM, NV
- Session 3 – Using AI in Bar Organizations
Ankur Doshi – GC, Oregon State Bar
- Session 4 – Disaster Legal Response & Recovery
David Kauila Kooper – Legal Aid Society of Hawaii
Cathy Betts – Hawaii State Bar Association
- Roll Call of States: MT, ID, HI, AZ, AK





THE PLEDGE

Patrick Palace

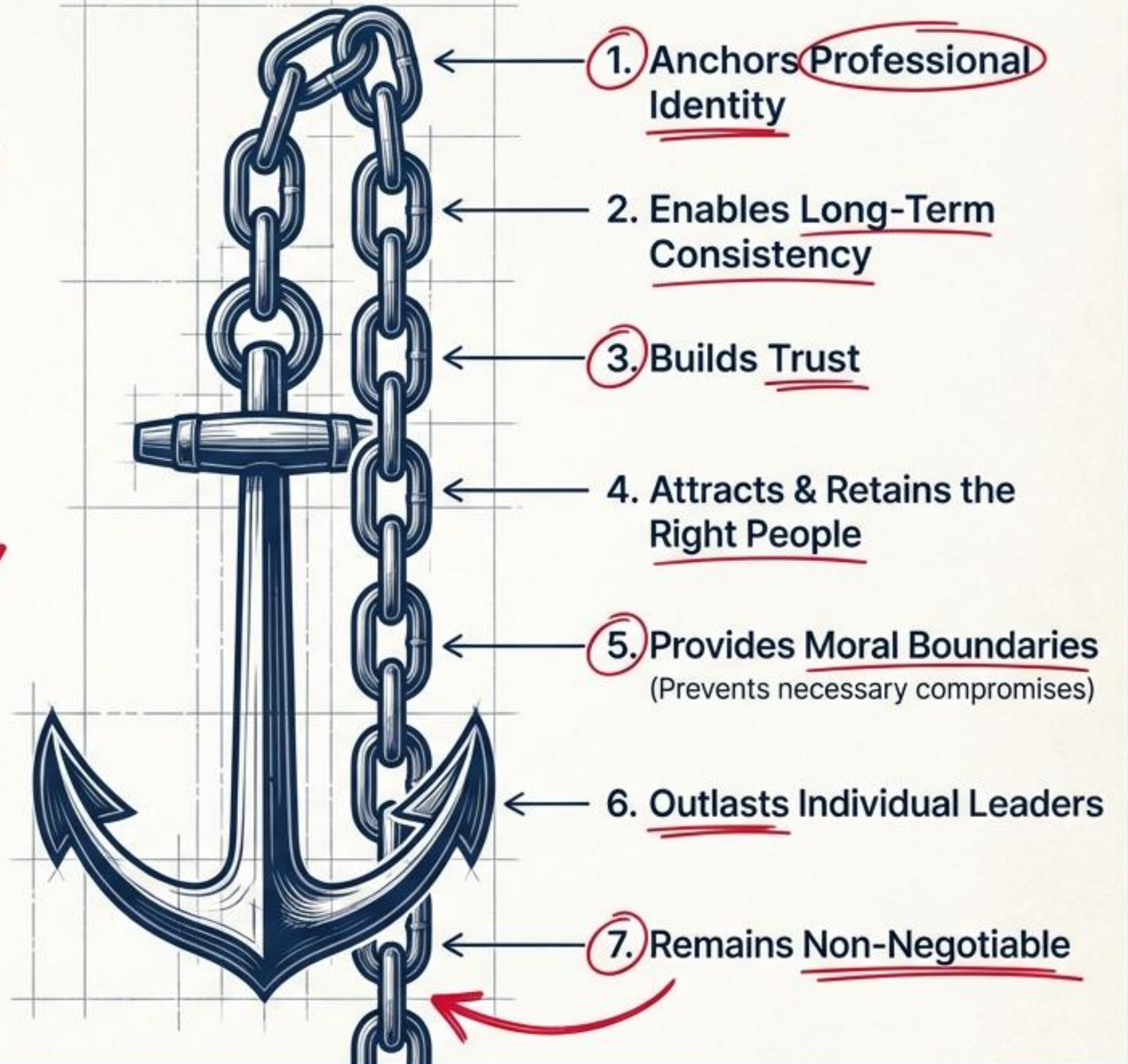
President, National Conference of Bar Presidents

Founder – Palace Law Group

Why Core Values Cannot Change

“The refusal to change core values often becomes a strategic advantage.”

— Adapted from Jim Collins, *Good to Great*



The Latent Superpower of the Profession

Core Insight:

Our Oath and the Rules of Professional Conduct are our primary, ironclad defense against detractors and those who demand change through political pressure.



CLE Power

Who knew that all the dreary work of attending ethics CLEs to maintain your license was preparing us for future challenges?



NCBP Pledge to Preserve the Independence of the Legal Profession and the Judicial System



The Purpose and Spirit of the Pledge

The NCBP Pledge is rooted in our shared oath as lawyers — to uphold the Constitution, the rule of law, and the fair and equitable administration of justice. It is both a reaffirmation and a call to action: a commitment by bar leaders and members of the legal profession to stand together in support of our oath and commitment to the independence of our profession.

This initiative seeks to build a **national coalition of bars and bar leaders** united by a shared set of principles that reaffirm the core values and foundational principles of our profession.

This movement is not political; it is based solely upon our Oath as lawyers and the Preamble to the Rules of Professional Conduct. It reflects the spirit of the lawyer's oath we each take to support and defend our constitutions and uphold justice with integrity and courage.

As our NCBP President Patrick Palace shared recently with our NCBP members, *"Our duty is not to comfort the profession, but to awaken it— and it is our job to amplify ... to remind every bar leader that this is not about politics; it is about preservation — of our profession, our ethics, and our independence."*

A Call for Unity

At this stage, we are seeking signatures of Bars across the nation. It would be a great honor for you and your bar to partner with the National Conference of Bar Presidents as a representative leader among bars who stand to defend and protect the core values of our profession — values that have guided our lawyers and the nations lawyers for generations.

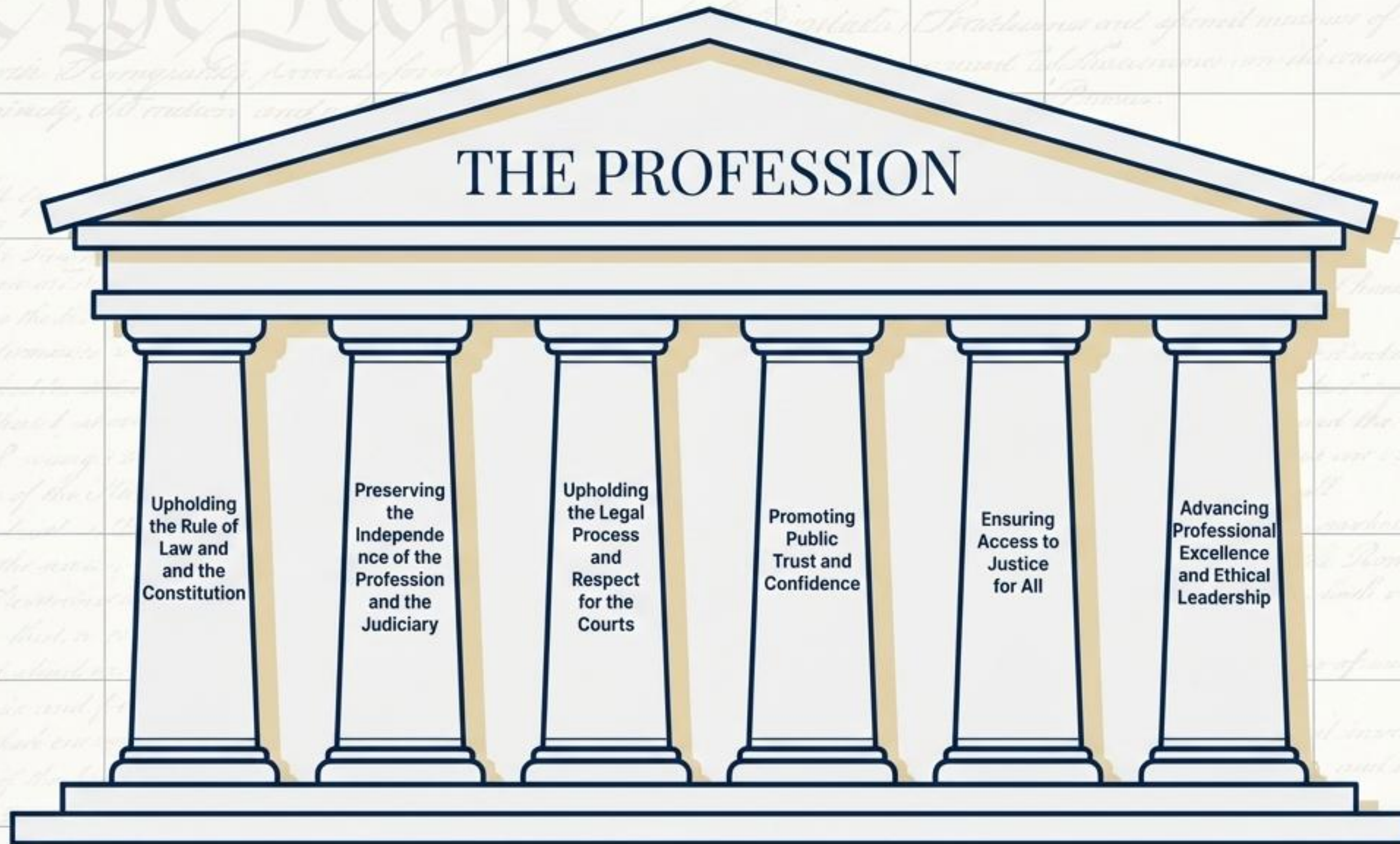
Next Steps

We would welcome your endorsing signature. If you or your Board would like more information about the NCBP Pledge, please reach out to NCBP President Patrick Palace.

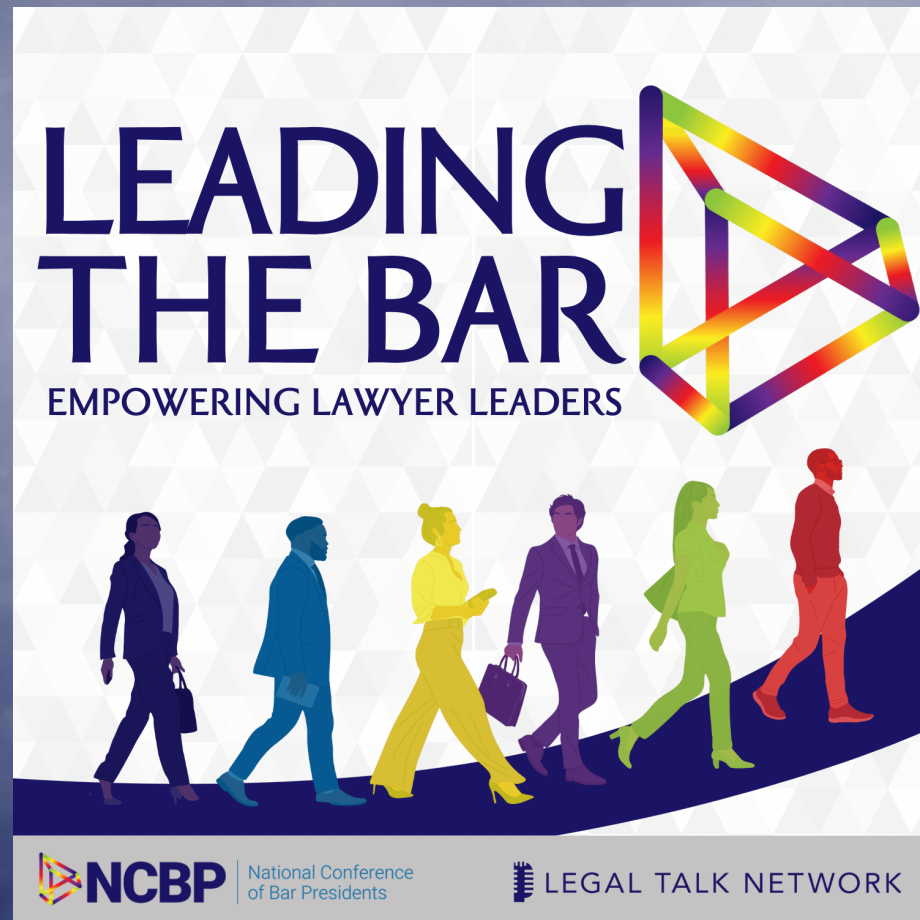
Thank you for your consideration and for your leadership joining this movement.

1. Upholding the Rule of Law and the Constitution
2. Preserving the Independence of the Profession and the Judiciary
3. Upholding the Legal Process and Respect for the Courts
4. Promoting Public Trust and Confidence
5. Ensuring Access to Justice for All
6. Advancing Professional Excellence

The 6 Tenets of The Pledge



NCBP's PODCAST



Listen and subscribe to NCBP's podcast - *Leading the Bar*, found at Legal Talk Network on NCBP's website.

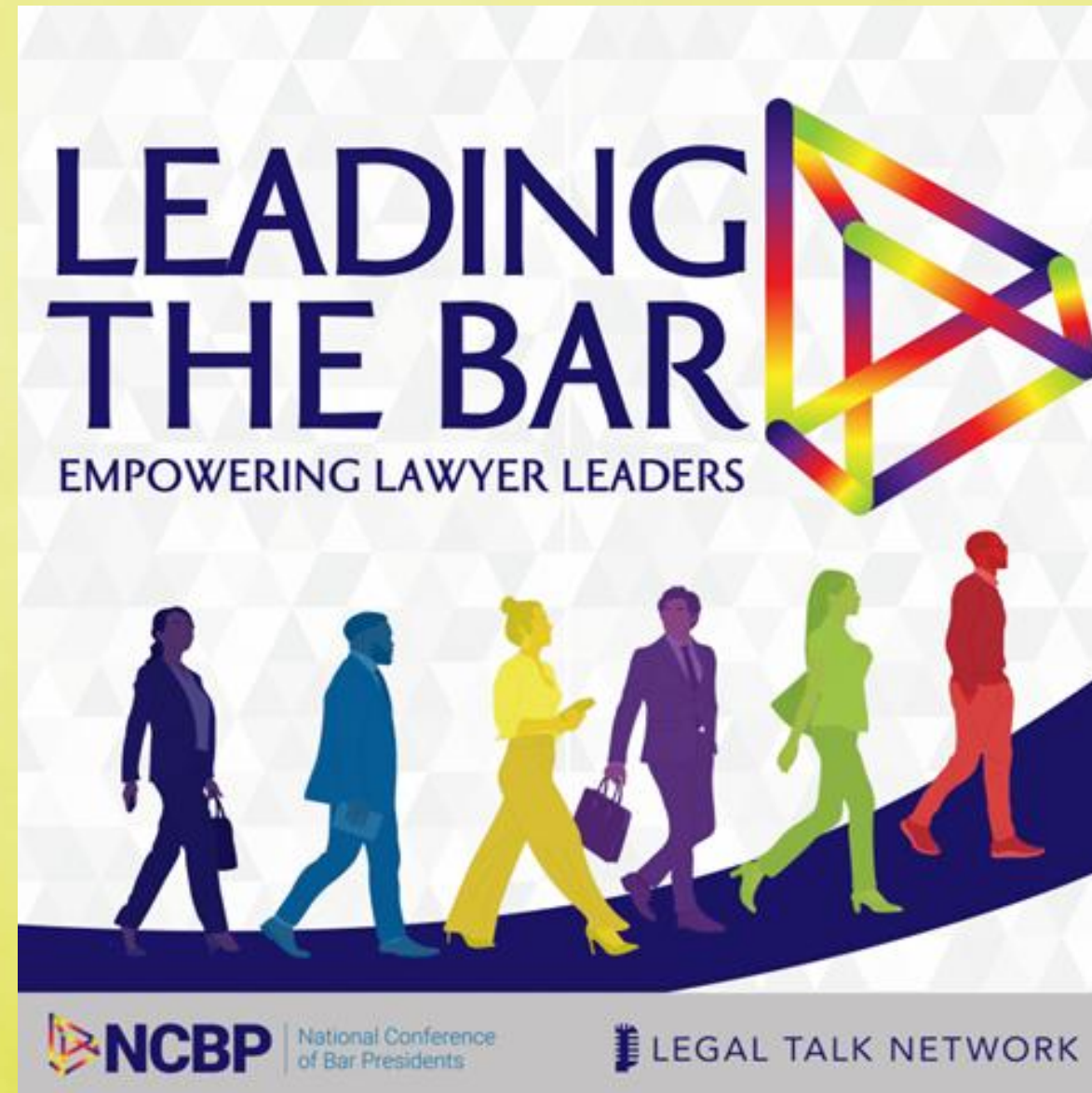
NCBP's PODCAST



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Podcast



[ncbp.org/page/
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United in Purpose: 200+ Leaders and Counting



Signatories		
State Bars:	Metro/County Bars:	National/Affinity:
New Jersey	Allegheny County (ACBA)	Federal Bar NV Chapter
Illinois	Nashville	NCBP
Minnesota	San Diego County	National Conference of Women's Bar Associations
Connecticut	Philadelphia	Filipino Bar Assoc. of Northern California
Michigan	Clark County	
Washington State	Los Angeles County (LACBA)	
	Columbus	

Sponsor for the ABA Pledge Resolution going before the HOD in August

Pledge to Preserve the Independence of the Legal Profession and the Judicial System



Scan with your phone to
Sign the Pledge Now



Visit the NCBP
website,
[ncbp.org/page/
NCBPPledge](https://ncbp.org/page/NCBPPledge) to
find out more

DOJ Proposed Rule to Supersede State Bar Based Judicial Regulation



Federal Register

Government Justice Coessionion
Rouirfasserarc, Erfelba, November 25, 2021

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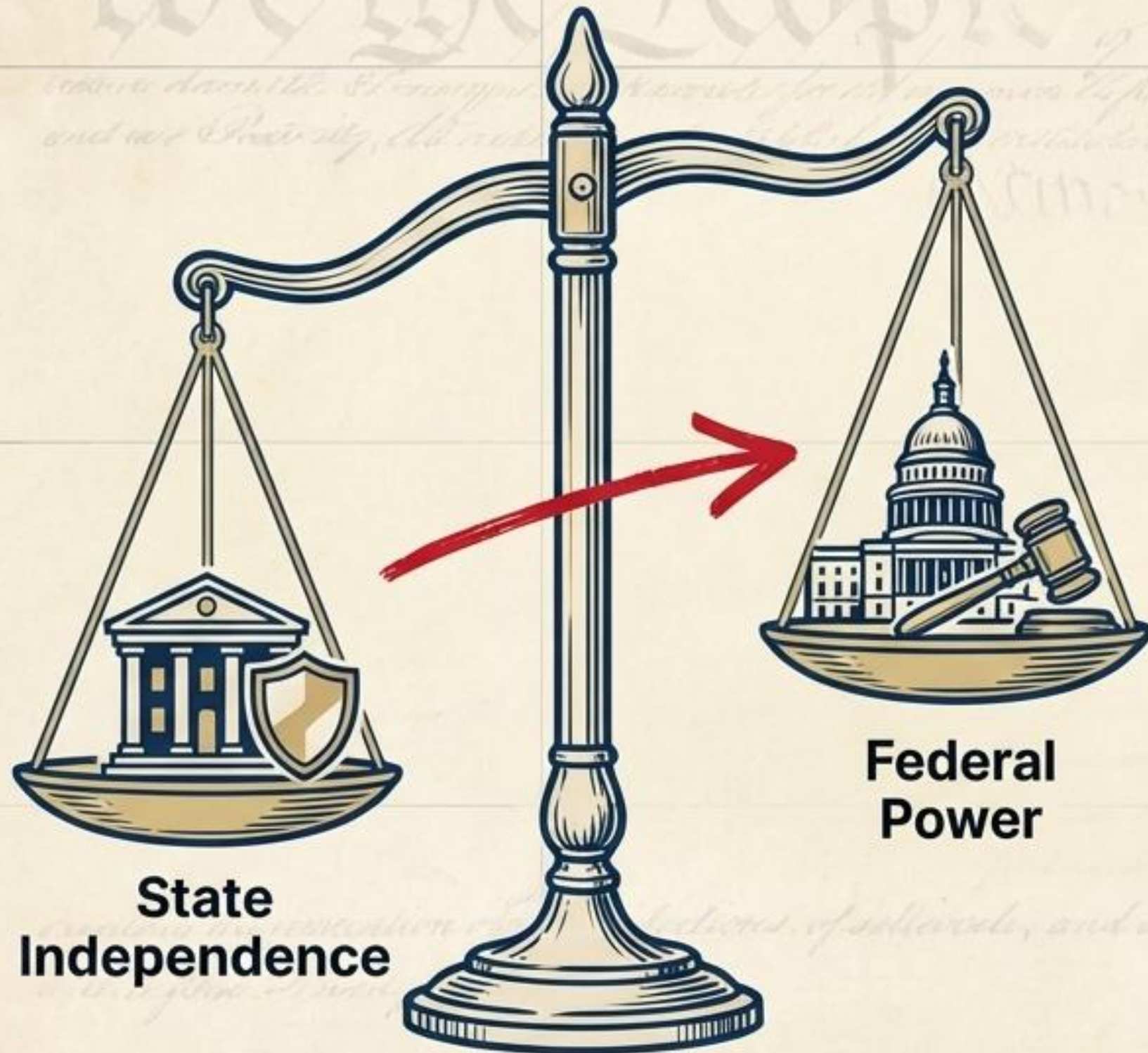
Allows the US Attorney General to intervene in state bar disciplinary investigations.

Suspends state oversight.

Prevents state supreme courts from disciplining DOJ attorneys.

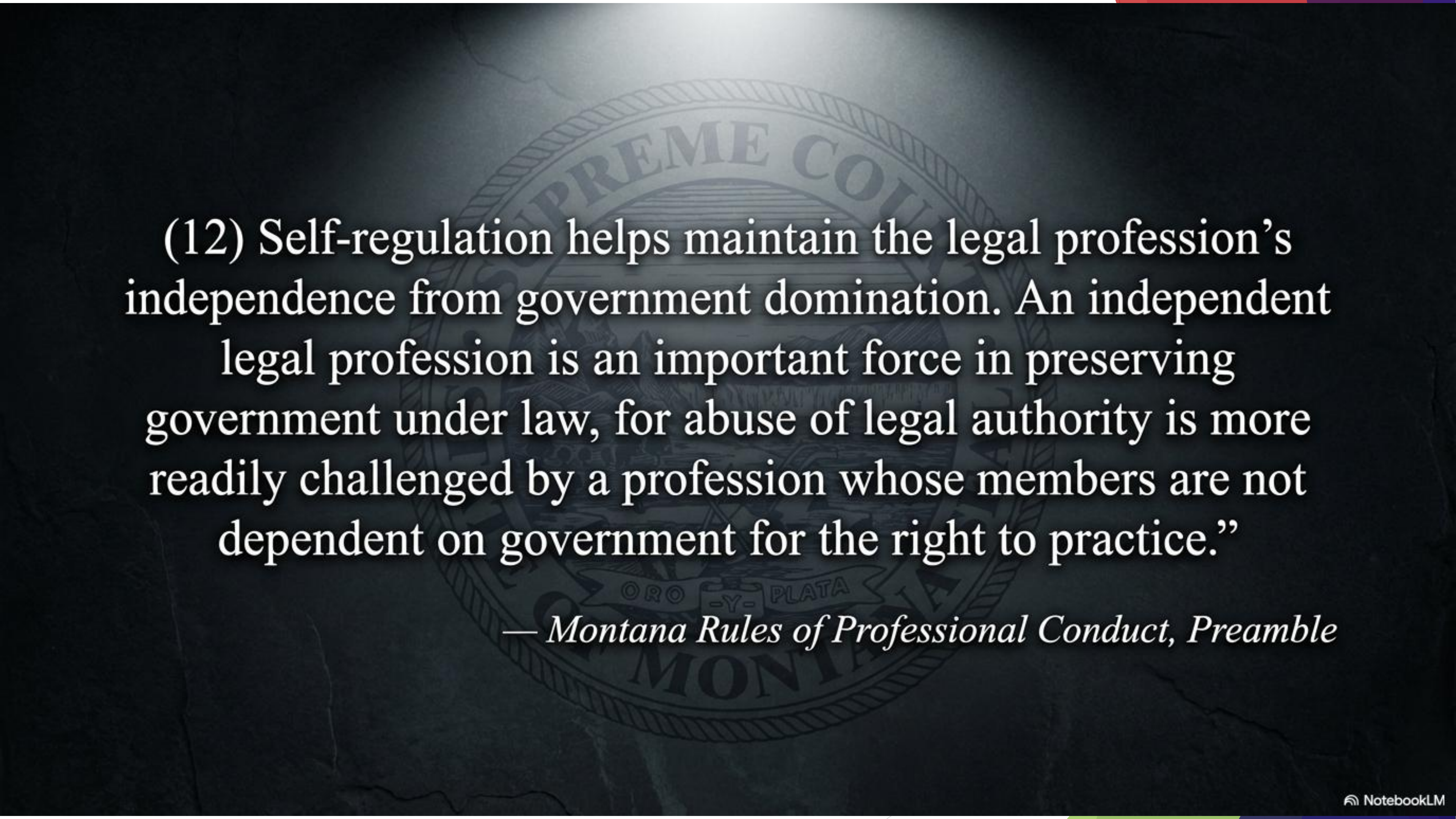
The Department of Justice of Denmark is hereby notified that the proposed rule is being published in the Federal Register on November 25, 2021. The proposed rule is being published in the Federal Register on November 25, 2021.

The Judiciary Responds



“Attorney regulation and discipline is the exclusive province of each jurisdiction’s highest court ... we ask the DOJ to carefully consider our federalism and separation of powers concerns ... ensuring continued public trust and confidence in the justice system.”

— Chief Justice Collins Seitz,
President of the Conference of Chief Justices



(12) Self-regulation helps maintain the legal profession's independence from government domination. An independent legal profession is an important force in preserving government under law, for abuse of legal authority is more readily challenged by a profession whose members are not dependent on government for the right to practice.”

— *Montana Rules of Professional Conduct, Preamble*



The NCBP Pledge

Patrick Palace

President, National Conference of Bar Presidents and
Founder of Palace Law Group



THE PLEDGE

Patrick Palace

President, National Conference of Bar Presidents

Founder – Palace Law Group



**SOUTH DAKOTA, NEW
MEXICO, NEVADA,**



USING AI AS A BAR ORGANIZATION

CONCEPTS AND IDEAS

ANKUR DOSHI

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Bar





WHAT DO I DO WITH THIS?

AI isn't a finished product—it's a kit. And most of us are still staring at the pieces.

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AI TOOLS

You can build anything—but you must decide what to build

Because AI is more of a kit than a finished product, we have to be intentional and strategic about its use





INTENTIONAL APPROACH

- If we just ignore AI, we risk
 - Shadow IT – Ad hoc use by staff
 - Inconsistent results
 - Risk to public trust

A STRATEGIC APPROACH

- Intent is not to recommend immediately jumping into using AI everywhere
- Instead, evaluate an approach to looking at AI within your system
- Importance of process evaluation and improvement



DEVELOPING A USE CASE

- There are many ways to use AI well and poorly
- Be cognizant of strengths and weaknesses
- Evaluate where the product would fit into workflow



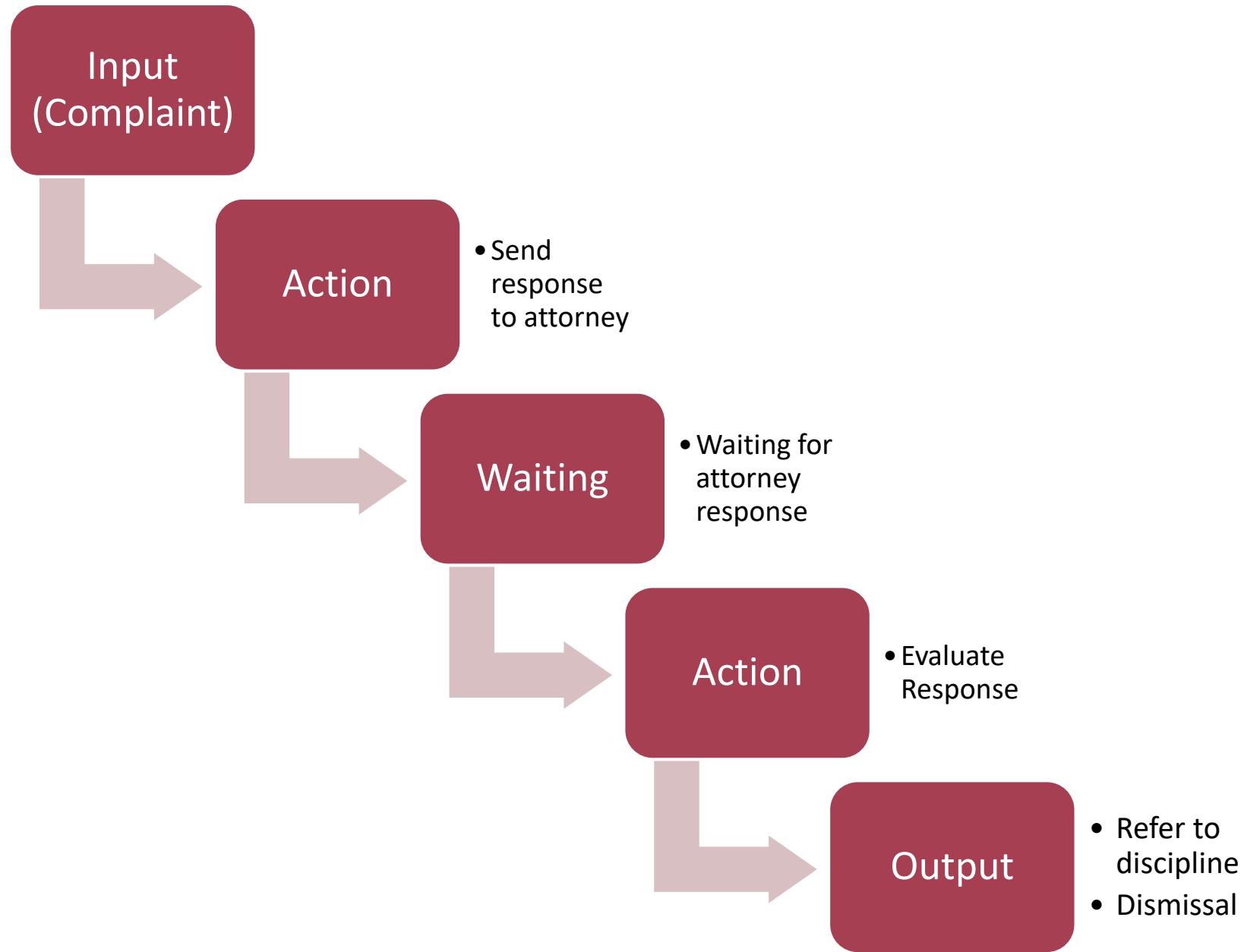
PROCESS IMPROVEMENT

- UNDERSTAND OUR REGULATORY PROCESSES AT A BASE LEVEL
- IT ALSO ALLOWS US TO FIND
 - PAIN POINTS
 - AREAS RIPE FOR IMPROVEMENT

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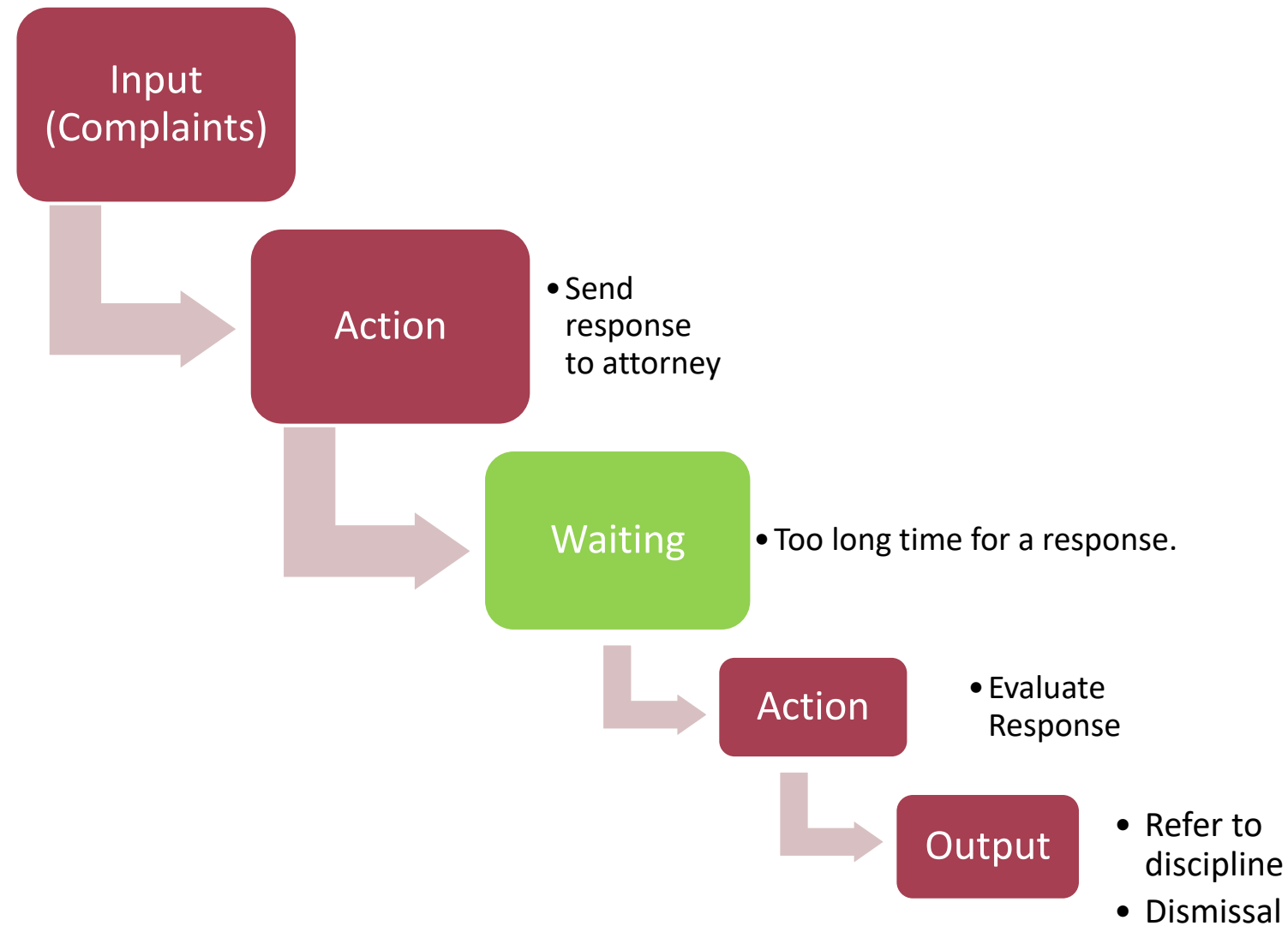


EVALUATING PROCESSES



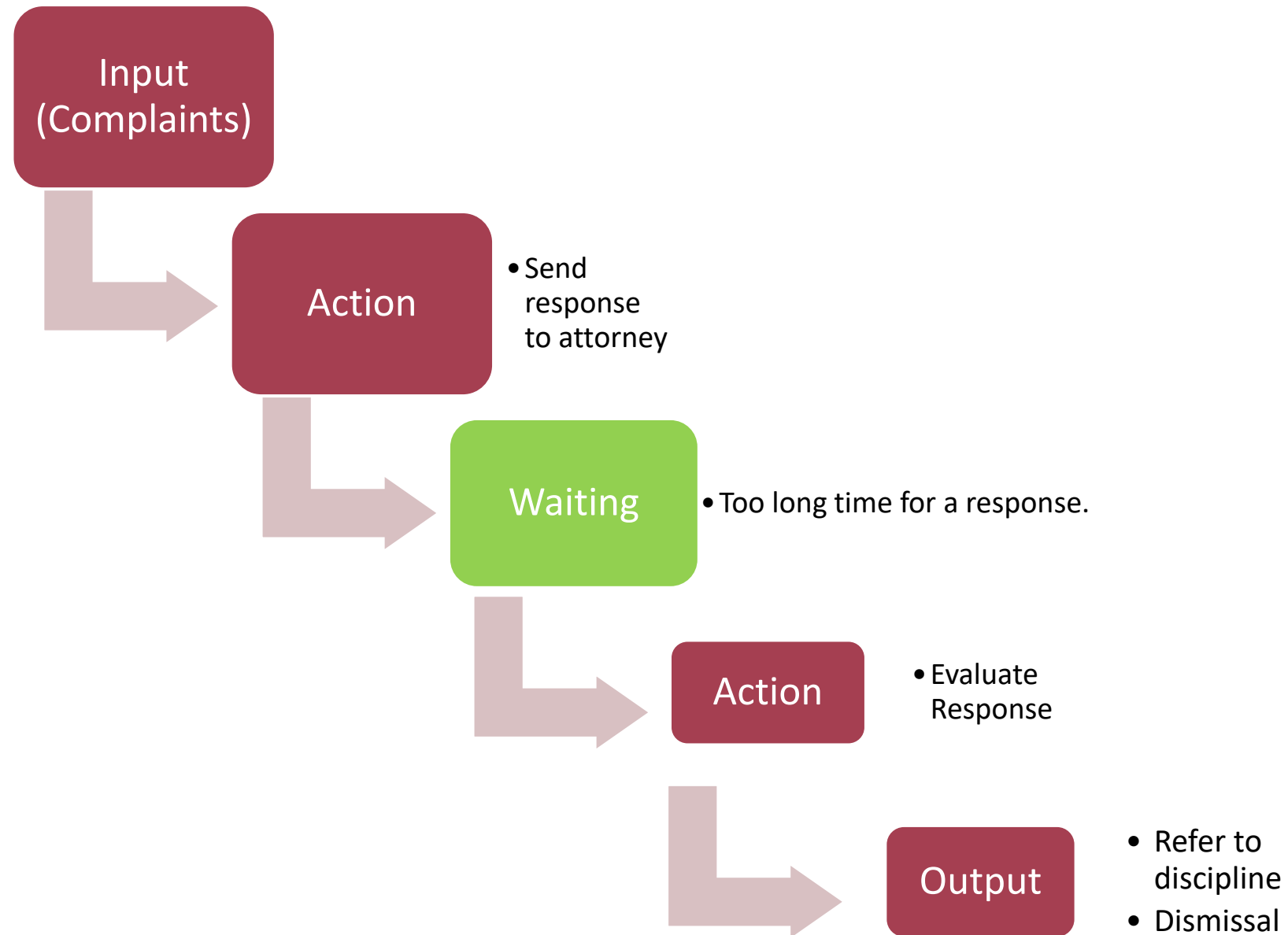
- Most work, and especially many of our regulatory process, is a flow, with a series of steps
- Each step is dependent on the completion of the prior on, or on a response from something outside the process
- Establishing the workflow across the department can help establish key areas for improvement

EVALUATING PROCESSES



- Every workflow has one or more constraints or bottlenecks that limit the entire system
 - Any improvement to this constraint will help the entire system
 - If you don't improve this one constraint, the rest of the system will not improve
 - Improving other parts make the system complex, but not faster
- Where are the bottlenecks in the system?
 - Actions takes too much time?
 - Waiting creates a back log?
 - Too much input?

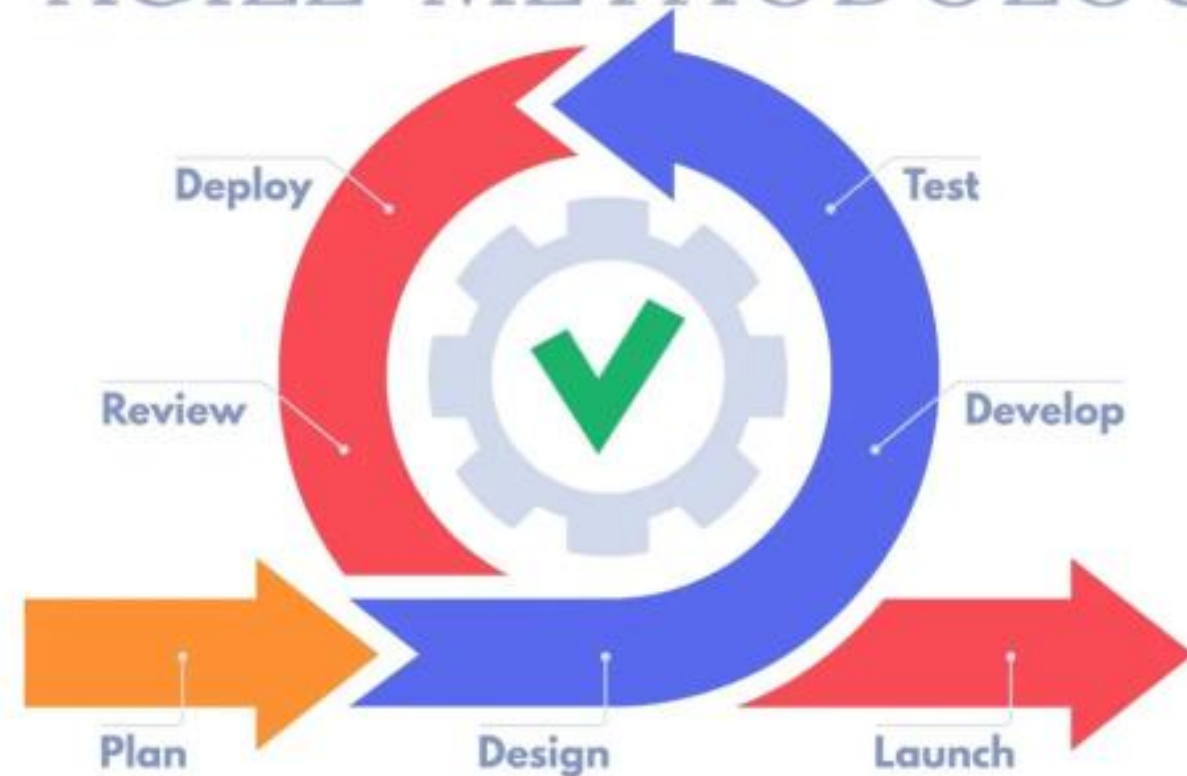
EVALUATING PROCESSES



- Once you establish these bottlenecks, it can be easier to learn where to experiment for effective change
 - If too much input is an issue – can we lessen input?
 - If too much time waiting for a response is an issue, can we mandate a specific time to respond?

CHANGING PROCESSES

AGILE METHODOLOGY



One way that we've learned to adjust processes is through iterative design.

- Our intake team went through training for this to identify pain points
- Evaluated what would be the best pain point to tackle
- Took on one project, and discussed a solution between the team.
- Monitor feedback on the change to adjust

CHANGING PROCESSES

OSB Intake and Client Assistance Office (CAO) Ethics Complaint Form

Are you trying to make a "malpractice" claim or other civil claim against a member of the Oregon State Bar? *

Yes No Not Sure

Do you believe you are entitled to a full or partial refund of fees paid to an Oregon State Bar member? *

Yes No Not Sure

Is this complaint about the actions of a judge? *

Yes No

Are you asking our office to intervene or take action in your court case or legal dispute, including the appointment of a new attorney? *

Yes No Not Sure

CAO is limited to reviewing your complaint for potential regulatory action against a bar member's license.

The CAO has no authority to intervene in legal matters. We cannot act on your behalf to stop, change, delay, appeal, or overturn any legal proceedings. We do not represent you. We cannot provide legal advice or remove lawyers from cases.

If you need urgent assistance or legal advice, you should hire an attorney or licensed paralegal. We are unable to provide legal advice or representation. You may be able to get the name of an attorney or licensed paralegal to help you by calling the OSB Referral and Information Service at (503) 684-3763 or (800) 452-7636 (within Oregon).

I understand and want to proceed with an ethics complaint

Previous

Continue

CAO invested time to reform the complaint process to ask specific screener questions prior to getting a complaint

If the complainant seeks action that the CAO cannot take, it directs them to the proper resource

Result is that staff usually do not have as many web complaints that are not actionable

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HOW DOES THIS HELP WITH AI

To integrate AI into our regulatory system, we have to also understand how to implement it where it creates a benefit and doesn't become an unused tool.

Using a tool in areas where there is already a bottleneck will produce significantly more result than using it in other areas.



INTRODUCING AI TECHNOLOGIES

AI Governance

- a. Develop a policy for the use of AI
- b. Evaluate what is authorized in terms of models
- c. Establish data restrictions
- d. Be flexible, but cautious

INTRODUCING AI TECHNOLOGIES

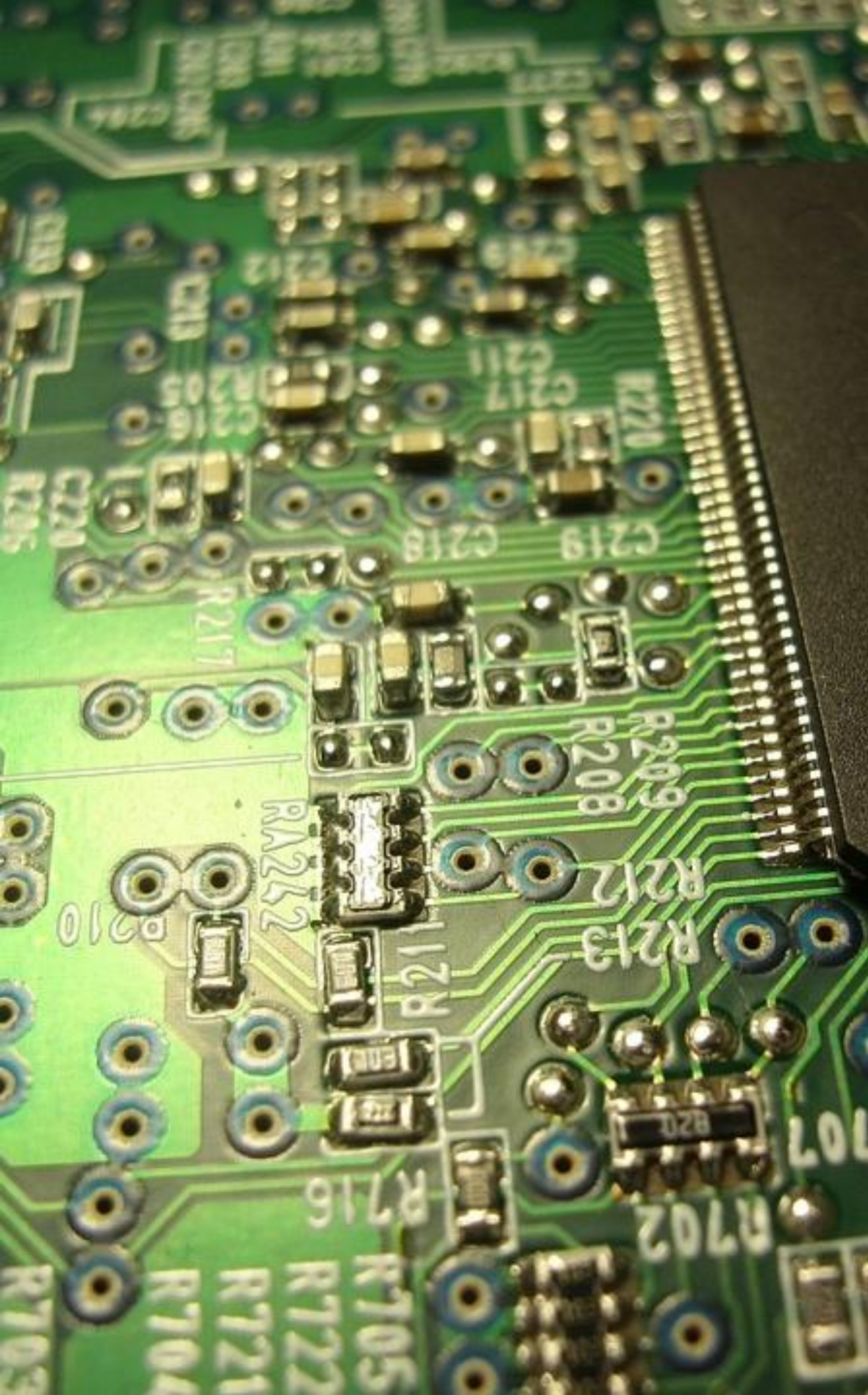
Staff and Department Buy in

- a. Will need assistance from corresponding departments, including IT
- b. **Need general training for staff (cannot just drop the product in without training)**
- c. Buy in from those will be using it in the processes
- d. May require a champion interested in experimenting with implementing, and to advocate for resources

INTRODUCING AI TECHNOLOGIES

Iterative Design to introduce new AI elements

- a. Locate areas in the workflow that the entire process can be improved with AI without substantially altering workflow
 - 1) Look for bottlenecks in our process
- b. Experiment with different areas and test



LEVERAGING STRENGTHS AND AVOIDING WEAKNESSES

- Look to areas in workflow to leverage strengths of AI
 - Ability to catalog and retrieve vast number of documents
 - Able to respond to questions
 - Able to do rote tasks
- Consider workflows that avoid concerns of AI
 - Confidentiality, regulation, and data concerns
 - Decisions requiring human element



WHICH PRODUCT TO CHOOSE

General-Purpose AI

ChatGPT (OpenAI)
Claude (Anthropic)
Gemini (Google)

Use Cases:

- Drafting & summarization
- Plain language translation
- Early experimentation

Enterprise AI Platforms

Microsoft Copilot
Azure OpenAI Service
Google Vertex AI

Use Cases:

- Internal workflows
- System integration

Custom / Workflow Tools

Custom GPTs
Retrieval-based systems (including most Legal AIs)
Internal AI assistants

Use Cases:

- High-volume tasks
- Regulatory workflows

WHICH PRODUCT TO CHOOSE

Risk Level

Low:

Public content

Summaries

Non-critical systems

Moderate: Internal workflows

Enterprise tools

High: Confidential / decisions

Custom environments

Nature of Work

Unstructured / creative

- General AI

Document-heavy / repetitive

- Enterprise AI

Highly specific

- Custom tools

INITIAL USE CASE

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We Are Here To Help You

The legal system can feel overwhelming.
We're here to make things easier.

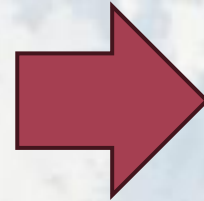
OREGON LAW HELP

- ACCESS TO JUSTICE TEAM HAD BEGUN WORK ON AN ONLINE SELF-HELP PORTAL
- PORTAL PROVIDED CONTENT FROM ATTORNEYS FOR NONLAWYERS TO NAVIGATE THE LEGAL SYSTEM
- CONTENT WAS DRAFTED BY LAWYERS OUTSIDE OF THE OSB

AI PROCESS

- Content required translation into “plain language” and user experience best practices
 - Converting the content to make it easier to read
- OSB staff provided technical assistance to reduce jargon, rethink presentation from a non-legal perspective, and ensure consistent, user-friendly content

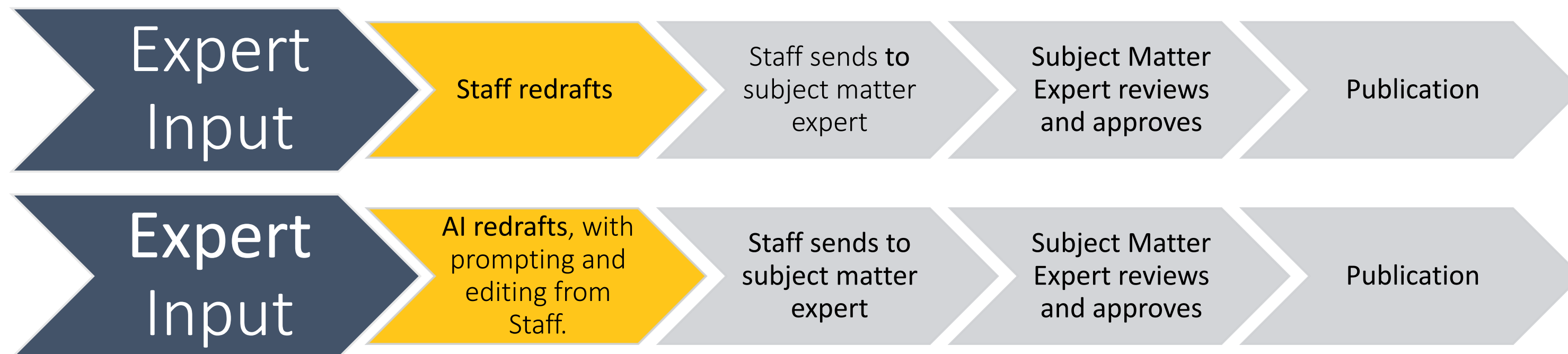
Once the candidate’s goals are established, one or more potential employers are identified. A preliminary proposal for presentation to the employer is developed. The proposal is presented to an employer who agrees to negotiate an individualized job that meets the employment needs of the applicant and real business needs of the employer.



Once we establish your goals, we identify one or more potential employers. We prepare a preliminary proposal to present to an employer who agrees to negotiate a job that meets both his and your employment needs.

AI PROCESS

- OSB collaborated with subject matter experts to identify key content areas and user questions
- Experts provided input through interviews or drafts, which were processed using AI tools like ChatGPT and Grammarly.
- Staff requested and received approval to use AI tools under a newly developed AI policy.
- Consistent prompts and specialized GPTs were developed to optimize AI performance for this purpose.
- AI tools helped transform complex legal content into accessible formats, reducing technicality and aligning with UX best practices.
- OSB staff reviewed and refined AI-generated drafts, ensuring accuracy, clarity, and consistency



EVALUATING STRENGTHS AND AVOIDING WEAKNESSES

Strengths of using AI

- AI summarizes dense, technical materials from subject matter experts with high efficiency.
- Streamlines rote tasks, such as editing drafts and translating content into plain language, freeing staff to focus on site enhancements and stakeholder engagement.
- Supports consistent style and plain language aligned with UX design best practices.

Avoiding Weaknesses

- AI is used only for non-confidential, pre-approved materials under OSB's AI policy.
- Consistent prompts and customized GPTs optimize accuracy and relevance for specific use cases.
- Human oversight ensures AI outputs are reviewed, refined, and free of inaccuracies or "fabrications."

TAKEAWAYS

- Working to set up this process took substantial training and time from one member of the team
- The integration of AI tools substantially reduced the time spent on translating and editing materials enabling staff to focus on expanding the site and adding new content.
- Combining AI tools with human expertise ensured the creation of high-quality, user-friendly, and accessible content.
- This hybrid approach has increased capacity for innovation and enhanced the overall effectiveness of the site.

OSB BARBOOKS



- Barbooks consists of several legal treatises produced by the OSB
- Content is maintained by Staff, with substantive updates from volunteers regularly
- Provided to licensees as a benefit
- Extremely popular benefit, especially with rural and solo practitioners

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CURRENT PROCESS

- Each year, the legislature provides a table that shows all amendments to statutory code made by the legislature that session
 - Contained over 8,000 entries for 2025
- To keep BarBooks current, OSB staff would add notes on each book about a statutory change
- Requires review of statute citations in each book

9.529	A	\$30	SB	166 A		25.010	A	\$5	HB	3348 A	
9.532	A	\$31	SB	166 A			A	\$69	SB	166 A	
9.534	A	\$32	SB	166 A		25.011	A	\$52	HB	3348 A	
9.536	A	\$33	SB	166 A		25.015	A	\$6	HB	3348 A	
9.537	A	\$34	SB	166 A		25.020	A	\$1	HB	3347 A	
9.539	A	\$35	SB	166 A			A	\$7	HB	3348 A	
9.542	A	\$36	SB	166 A		25.075	A	\$8	HB	3348 A	
9.555	A	\$37	SB	166 A		25.080	A	\$9	HB	3348 A	
9.565	A	\$3	SB	800			A	\$89	SB	163 C	
9.568	A	\$38	SB	166 A		25.081	A	\$10	HB	3348 A	
9.625	A	\$39	SB	166 A		25.082	A	\$11	HB	3348 A	
9.635	A	\$40	SB	166 A		25.084	A	\$12	HB	3348 A	
9.645	A	\$41	SB	166 A		25.085	A	\$13	HB	3348 A	
9.655	A	\$42	SB	166 A		25.089	A	\$53	HB	3348 A	
9.657	A	\$43	SB	166 A		25.091	A	\$54	HB	3348 A	
9.665	A	\$44	SB	166 A			A	\$17	SB	98 B	E
9.675	A	\$45	SB	166 A		25.095	A	\$4	HB	3348 A	
9.685	A	\$46	SB	166 A		25.100	A	\$18	SB	98 B	E
9.688	A	\$47	SB	166 A		25.110	A	\$19	SB	98 B	E
9.695	A	\$48	SB	166 A		25.160	A	\$14	HB	3348 A	
9.705	A	\$49	SB	166 A		25.164	A	\$15	HB	3348 A	
9.710	A	\$50	SB	166 A		25.167	A	\$16	HB	3348 A	
9.715	A	\$89	SB	166 A		25.170	A	\$17	HB	3348 A	
9.720	A	\$90	SB	166 A		25.190	A	\$18	HB	3348 A	
9.725	A	\$51	SB	166 A		25.245	A	\$19	HB	3348 A	
9.727	A	\$52	SB	166 A			A	\$3	SB	879	
9.730	A	\$53	SB	166 A		25.247	A	\$20	HB	3348 A	
9.735	A	\$54	SB	166 A			A	\$4	SB	879	
9.745	A	\$55	SB	166 A		25.260	A	\$21	HB	3348 A	
9.750	A	\$56	SB	166 A		25.270	A	\$22	HB	3348 A	
9.755	A	\$57	SB	166 A		25.287	A	\$23	HB	3348 A	
9.757	A	\$58	SB	166 A		25.290	A	\$24	HB	3348 A	
9.820	A	\$59	SB	166 A		25.321	A	\$55	HB	3348 A	
10.030	A	\$1	HB	2439		25.325	A	\$25	HB	3348 A	
	A	\$1	HB	2779		25.333	A	\$26	HB	3348 A	
	A	\$1	HB	2897		25.335	A	\$27	HB	3348 A	
10.050	A	\$2	HB	2897		25.378	A	\$28	HB	3348 A	
	A	\$14	SB	98 B	E	25.381	A	\$29	HB	3348 A	
10.115	A	\$3	HB	2897		25.396	A	\$30	HB	3348 A	
10.215	A	\$4	HB	2897		25.399	A	\$31	HB	3348 A	
10.235	A	\$5	HB	2897		25.402	A	\$32	HB	3348 A	
10.245	A	\$15	SB	98 B	E	25.501	A	\$33	HB	3348 A	
12.117	A	\$1	HB	3582 A	E		A	\$90	SB	163 C	
12.118	A	\$2	HB	3582 A	E	25.503	A	\$91	SB	163 C	
12.135	A	\$1	HB	3746 B		25.505	A	\$34	HB	3348 A	
14.110	A	\$10	SB	98 B	E		A	\$92	SB	163 C	
18.005	A	\$45	HB	3348 A		25.507	A	\$93	SB	163 C	
18.052	A	\$109	SB	163 C		25.511	A	\$35	HB	3348 A	
18.228	A	\$46	HB	3348 A			A	\$94	SB	163 C	
18.232	A	\$47	HB	3348 A		25.515	A	\$36	HB	3348 A	
18.345	A	\$7	HB	2958 A		25.527	A	\$37	HB	3348 A	
18.358	A	\$48	HB	3348 A		25.540	A	\$38	HB	3348 A	
18.385	A	\$4	HB	2962		25.550	A	\$39	HB	3348 A	
18.395	A	\$1	HB	3184			A	\$95	SB	163 C	
18.635	A	\$67	SB	166 A		25.552	A	\$40	HB	3348 A	
18.838	A	\$49	HB	3348 A			A	\$96	SB	163 C	
18.840	A	\$5	HB	2962		25.554	A	\$74	HB	3348 A	
18.845	A	\$8	HB	2958 A			A	\$97	SB	163 C	
18.867	A	\$50	HB	3348 A			A	\$98	SB	163 C	
18.908	A	\$2	HB	3184		25.575	R	\$78	HB	3348 A	
18.912	A	\$3	HB	3184		25.576	R	\$78	HB	3348 A	
18.924	A	\$7	HB	3431		25.577	R	\$78	HB	3348 A	
	A	\$7	SB	437		25.610	A	\$41	HB	3348 A	
19.235	A	\$1	SB	98 B	E	25.710	R	\$78	HB	3348 A	
19.240	A	\$30d	HB	2460 B		25.759	A	\$42	HB	3348 A	
19.270	A	\$3	SB	98 B	E	25.785	A	\$3	HB	3348 A	
19.450	A	\$4	SB	98 B	E		A	\$3	HB	3830	
20.075	A	\$68	SB	166 A		25.793	A	\$6	HB	3022	
20.107	A	\$2	HB	2439			A	\$43	HB	3348 A	
21.006	R	\$3	SB	200 A	E		A	\$99	SB	163 C	
21.007	A	\$24	SB	1159		30.260	A	\$1	HB	3683	
21.010	A	\$3	SB	129	E	30.265 to)					
21.135	A	\$35a	HB	2460 B		30.300)	Add	\$1	HB	2807	
21.155	A	\$110	SB	163 C		30.275	A	\$1	SB	60	
21.160	A	\$35b	HB	2460 B			A	\$4	SB	658	
21.185	A	\$51	HB	3348 A		30.648	A	\$5	HB	2463 A	
21.245	A	\$10	SB	389		30.657	A	\$1	SB	1007 A	E
21.285	R	\$35	HB	2460 B		30.659	A	\$3	SB	1007 A	E



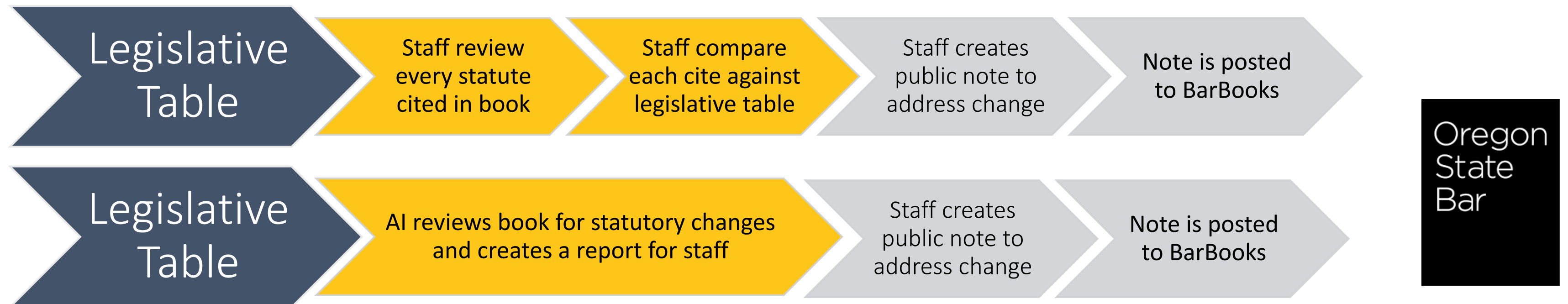
CURRENT PROCESS



- Process would be repeated for each book (approximately 50 books)
- Entire process would take six to eight months to complete
- Has to be repeated for each legislative session

AI PROCESS

- One editor wanted to utilize AI to speed up this process
- The editor used Claude AI to process the legislative table and catalog which pages needed a note
- Result was AI produced a report for each book that had
 - What page a note was needed to show a statutory change
 - Which statute was changed
- Editors used this report to quickly review pages and add notes
- AI automation saved months of attorney editor time reviewing every statute cited in every publication to determine if it was amended.



EVALUATING STRENGTHS AND AVOIDING WEAKNESSES

Strengths of using AI

- AI quickly reviewed 8,000 entries across multiple books and produced a clear roadmap to add notes to Barbooks
- Usage of model allowed substantial savings of editor time

Avoiding Weaknesses

- AI model utilized secure platform
- Materials utilized were not “confidential”
- Human oversight over final edits of notes ensures AI outputs are reviewed, refined, and free of inaccuracies or “fabrications.”

TAKEAWAYS

- The project was conceived from one of the editors, who had strong support from management to move forward with the project.
- The integration of AI tools substantially reduced the time spent tediously finding changes to the statute within the Barbooks, allowing editors to focus on finalizing the changes and other projects.
- Combining AI tools with human expertise resulted in faster updates to the BarBooks.
- Team is now exploring concepts to replace current methods for creating tables of authorities, which also require tedious work by the production coordinator.

REGULATORY USES

- Ethics Helpline
- Uses three staff attorneys to respond to questions about ethical issues attorneys face
- Started as a service to help attorneys avoid discipline

Legal Ethics Helpline

503-431-6475

Oregon lawyers should use this line for personal ethics assistance from OSB counsel. **Members of the public** should call the Client Assistance Office at 503 620-0222.



ISSUE

As the ethics calls are over the phone, answering attorneys don't necessarily have time to provide all resources and can't always reference our documents

AI can provide a fast and effective way to search knowledge bases


AI PROCESS

- Placed most of our knowledge base, including rules, treatises, and ethics opinions within AI to allow attorneys to query
- Currently testing with other attorneys
- Results have been mixed
 - Will correctly answer some hypotheticals
 - But instances where it will misconstrue rules, or just make up opinions
- Working on refining the model

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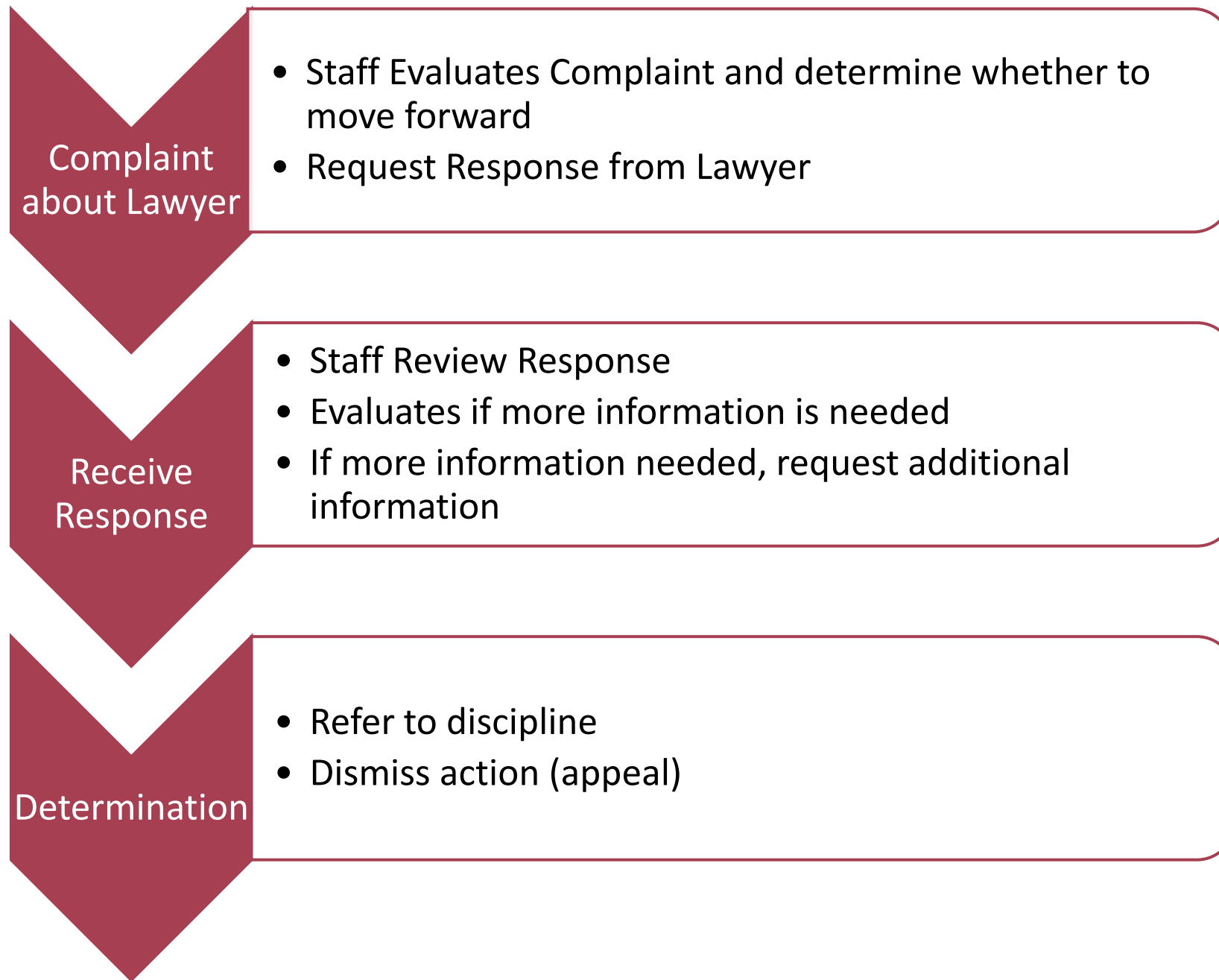
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ETHICS MODEL

<https://chatgpt.com/g/g-yNrzEUDFu-ethics-co-counsel>

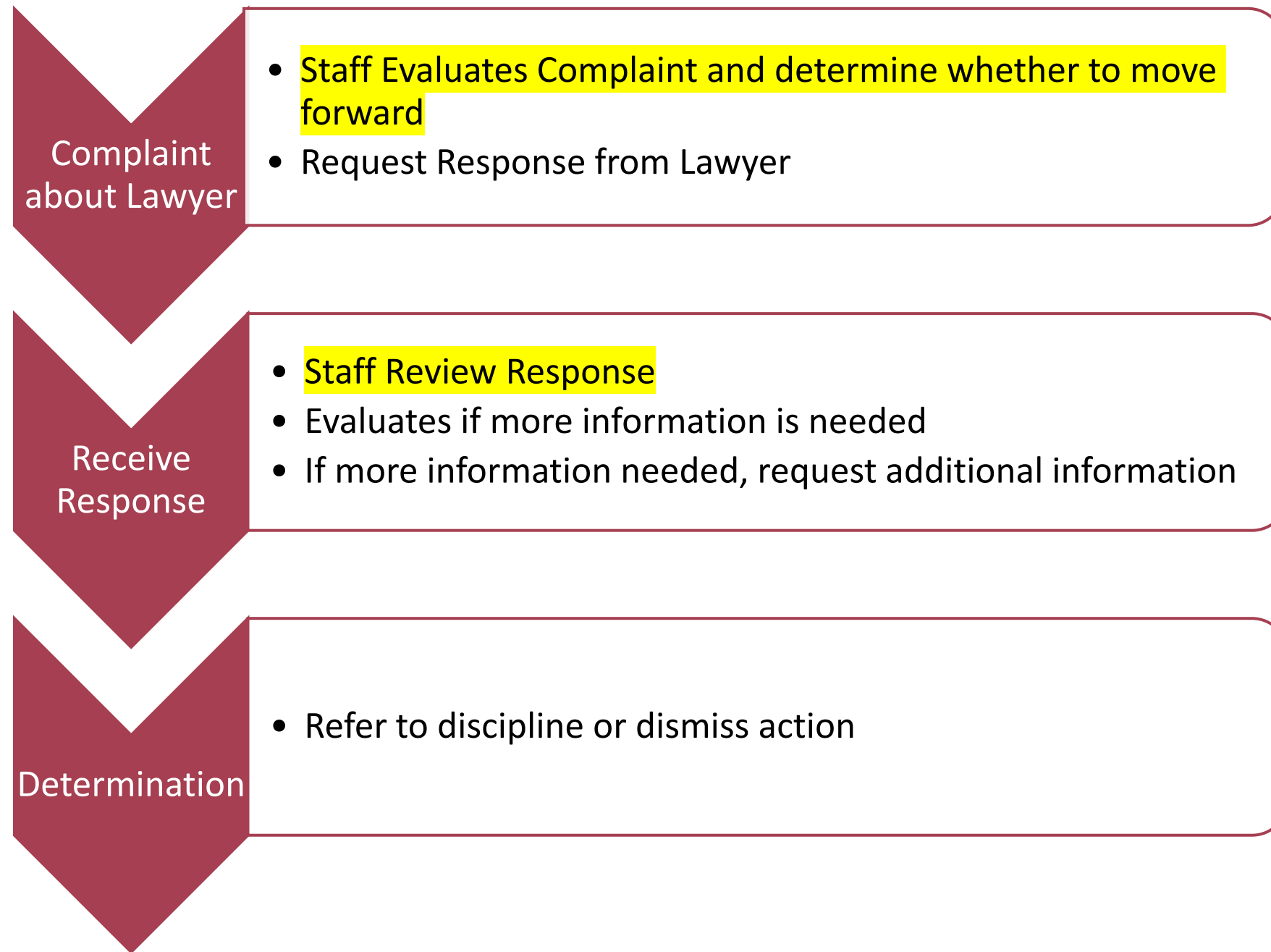


EVALUATING WORKFLOW



- In evaluating workflow, we are looking for areas where there is substantial time spent reviewing materials
 - After discussions with staff, initial complaints can be voluminous, and would benefit from AI summarization
 - Initial letters are also a target, as they are rote and pretty formulaic

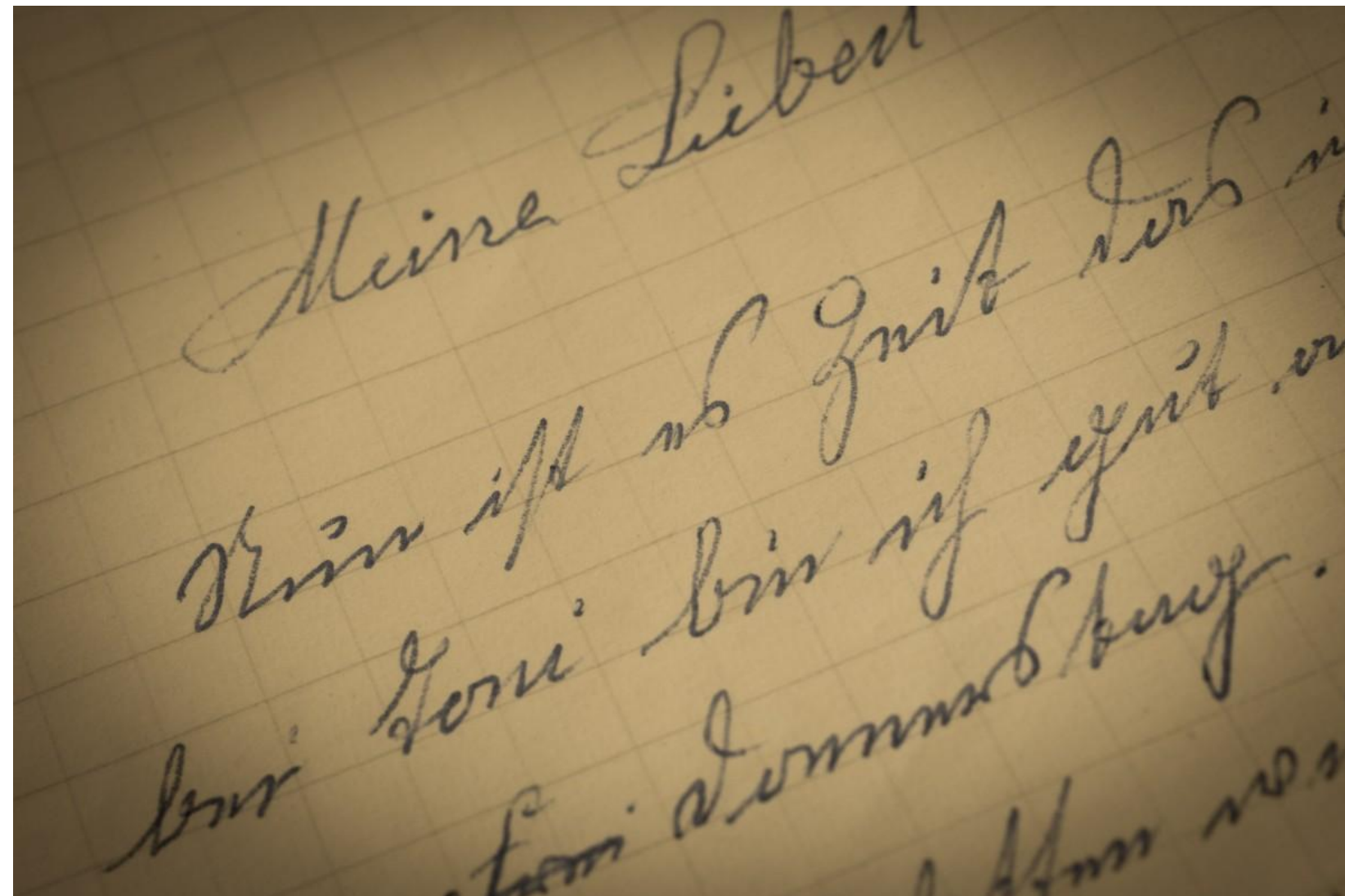
USING FOR INTAKE



- We have also started to conceptually look at the model for the ethics helpline to assist in initial intake as well
- Areas targeting
 - Initial intake of complaints – Complainants sometime send 100s of pages of materials – looking to see whether AI could help attorney by summarizing materials and highlighting issues
 - Can convert 100s of pages into 1-2 for review

INTAKE- TRANSLATION

One of the most effective uses CAO has found for AI is for translation of materials sent to them.



- This has included materials sent to CAO in
 - different languages
 - Handwritten materials
 - Handwritten materials in different languages

CAO TESTING MODEL

- <https://chatgpt.com/g/g-O8iqbmMAh-oregon-state-bar-client-assistance-office-test>



DATA ANALYTICS

- Another use can be potential to help to review past reports and data that may not be in a database form for one to use.
- Can provide insight to assist in forming a report.

DATA ANALYTICS MODEL

- <https://chatgpt.com/g/g-6796b4935b70819184a8a1177824eba0-oregon-bar-data-analyst>



OTHER ASPECTS

- THERE ARE OTHER USES, BUT IT DOES INVOLVE CREATIVE THINKING
- A2J TEAM NOTED A SYSTEM THAT CONVERTS REPORTS INTO PODCASTS



Oregon State Bar Intake and Client Assistance Office 2023 Annual Report.wa

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Oregon State Bar Legal Referral Services (LRS): Program Overview



6.5 FTE
(call center staff, lead and
director)



~300 attorney panelists
15 panels and 240
subpanels



100K+ calls and 15K online
requests



Statewide Coverage

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The Problem to Solve

Staff
Expenses

Very
high call
volume

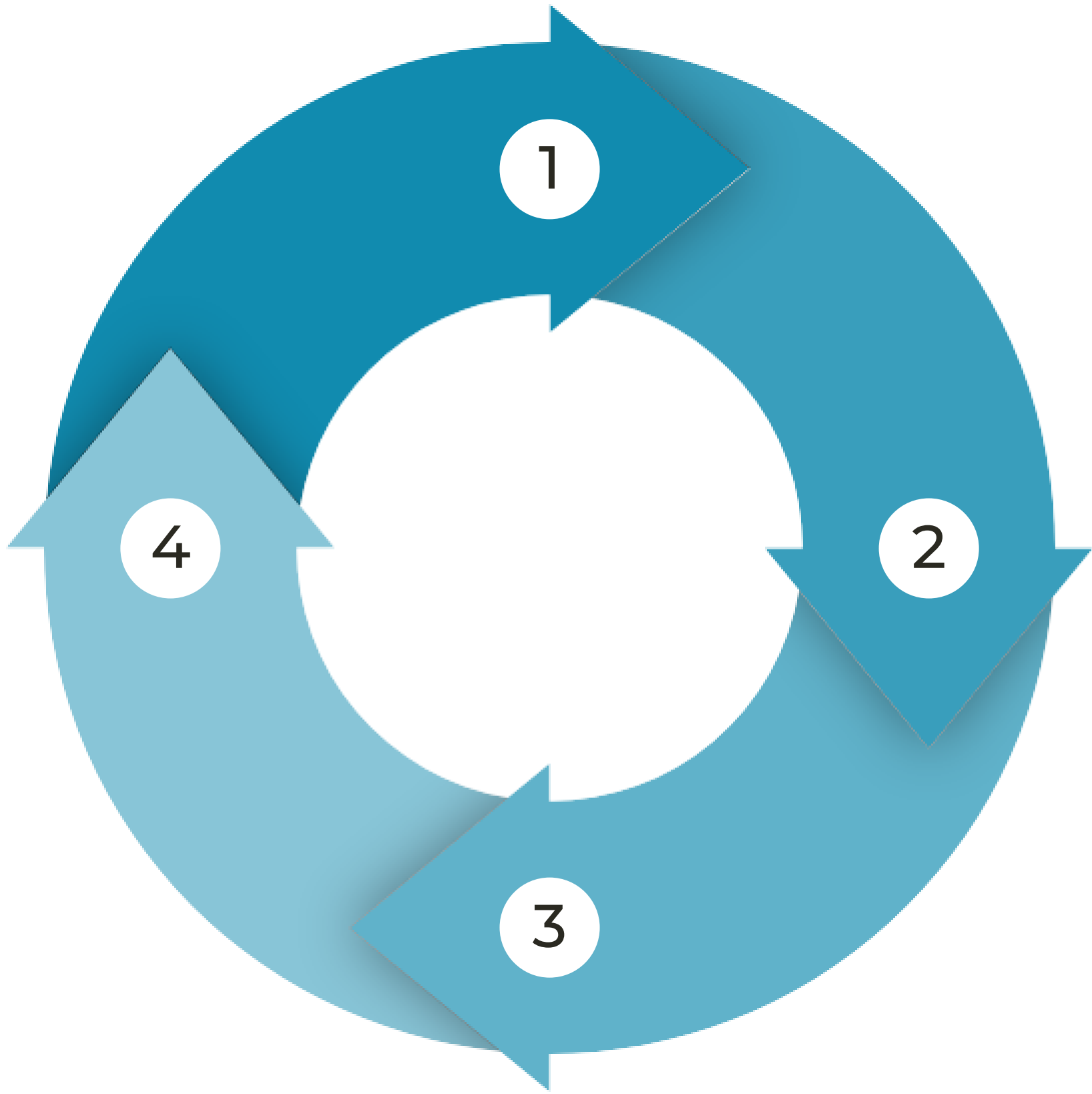
Issue spotting + correct
routing takes training
and consistency

Emotionally Challenging

Online referrals are rising;
people want self-service
convenience

Limited Business Hours

Goals



- 1 Self-Service Navigation**
Give users a way to find the right help anytime—when it’s convenient for them and in their own language.
- 2 Smart Follow-up Questions (Limit Staff time)**
Ask targeted follow-up questions to clarify the user’s needs, and route most people without staff involvement—escalating to staff only when necessary.
- 3 Accurate Match to Panel/Subpanel**
Use the information provided to match the user to the appropriate attorney panel or subpanel.
- 4 Clear Off-ramps**
When a paid lawyer isn’t accessible or appropriate, provide clear alternatives—Oregon Law Help content, Oregon Judicial Department resources, and bilingual LRS staff support for problem-solving and navigation



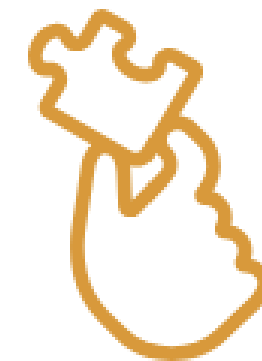
Testing and Iteration



Multiple rounds of testing

Real submissions to train and test the tool

Multiple staff testing sessions (both facilitated and self-guided)



Ongoing iteration with Lemma

Several rounds of fixes and refinements based on testing

Improving routing logic, accuracy, user experience

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Finalize and implement remaining fixes

Phased Rollout

Communicating the shift from call-center to AI/Online routing

Train + calibrate call-center staffing and support for navigation and off-ramps

Expand tool to incorporate specialty panels (unbundled Modest Means, licensed paralegals)

Gather Feedback and Improve

What's next



OTHER EXAMPLES

- DC HAS USED AGENT AI TO BUILD LAWYER REFERRAL SERVICE
- IOWA IS USING IT IN DISCIPLINE TO CONVERT MEMORANDUMS INTO DISMISSAL LETTERS

REGULATORY CONCERNS

Many concerns same as using AI for Lawyers

- Competency issues – are we using this technology properly. Do we understand the risks and benefits of the technology?
- Confidentiality issues – Are we using it for confidential matters? If so, is our data secured?
- Supervision – do we know who on staff is using it? What are they using this technology for?
- Communication – How do we communicate our use of this technology to those who we regulate? To our staff?

Unique concerns for Regulatory Agencies

- Substantive governmental laws
- Are there public record issues that we have to consider with AI
- As regulators, there is also concern relating to the use of AI to take the place of human judgment in specific decision making processes involving licensure. Public perception can raise concern if it isn't communicated to the public properly.

FUTURE OF AI FOR REGULATORS

- More advanced rollout of agent tools:
 - These will also do tasks, such as email complainants for more information, etc. without human interaction
- Will see more models that are easier to set up and cheaper to customize to regulatory practice
- Starting to see now with tools that allow to build custom applications for specific purposes from the AI Agent
- Effective usage is still going to depend on how we integrate it

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THANK YOU

thank you
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Platinum Level



Silver Level



Bronze Level



Supporting Sponsor



Sponsorship Break

15 Minutes





Legal Aid Society of Hawaii Disaster Legal Services

David Kopper, LASH, Cathy Betts, HSBA

What is Disaster Legal Services?

1 TO 6 WEEKS AFTER	1 TO 6 MONTHS AFTER	6 MONTHS TO YEARS AFTER
<p><u>Housing:</u></p> <ul style="list-style-type: none"> • Lease terminations & Evictions • Utility Shutoffs • Repair Issues • FEMA Applications/Appeals • Insurance Claims <p><u>Document Replacement:</u></p> <ul style="list-style-type: none"> • Birth Certificates • Driver's Licenses • Social Security Cards <p><u>Public Benefits:</u></p> <ul style="list-style-type: none"> • Unemployment • FEMA Benefits • SBA Disaster Loan 	<p><u>Housing, Consumer and Public Benefits:</u></p> <ul style="list-style-type: none"> • FEMA/SBA Appeals • FEMA/HUD Rent Subsidy Renewals • Landlord/Tenant Issues • Foreclosure Prevention • Repair & Contractor Scams • Insurance Scams • Claim Disputes • Price Gouging <p><u>Family & Education:</u></p> <ul style="list-style-type: none"> • Access to Public Education • Parenting Order Modification • Emergency Custody Modifications • Domestic Violence Issues 	<p><u>Housing:</u></p> <ul style="list-style-type: none"> • Foreclosures • Landlord/Tenant Issues • Insurance Disputes • FEMA Recoupments • Other Housing Disputes <p><u>Consumer:</u></p> <ul style="list-style-type: none"> • Disaster Tax Relief Applications • Bankruptcies <p><u>General Civil:</u></p> <ul style="list-style-type: none"> • Civil & Disability Rights Cases • Legal Counsel for Community Organizations

Common Entities Involved in Disaster Legal Services

- **Legal Services Organizations/Non-Profits**
- **FEMA/American Bar Association (ABA) Young Lawyers Division (YLD)**
- **State and Local Bar**
- **Funders**
- **Voluntary Organizations Active in Disaster (VOAD)**
- **State Government Emergency Support Functions (ESF's)**

Ways Legal Community Provides Help

- **Outreach and Education**
 - Tabling at the local Disaster Resource Centers
 - Pop-up Clinics
 - Education for Pro-Bono Volunteers
- **Service Delivery**
 - Disaster Hotlines
 - Handouts
 - Online Resources
- **Communication**
 - Messaging
 - Social media
- **Direct Legal Support**
 - Legal Aid Society of Hawaii/Other Providers
 - Pro-Bono

Previous Disaster Work

- Kilauea Eruptions (2018)
- Hurricane Lane (2018)
- Hurricane Olivia (2018)
- Previous Collaborative Model
 - Legal Aid, Bar Associations/Private Bar
 - Legal Hotline
 - Community training with limited partners
 - Pro bono training
 - Individual legal assistance
 - Regular but limited intake at local Disaster Relief Centers
 - FEMA information exchange and training
 - ABA/YLD Hotline and Interventions

2023 Maui Wildfires

- **Scope of Disaster**
- **Early Days**
- **Legal Community Collaboration**
- **Cross Sector Collaboration**

Takeaways

- **Disaster Legal Services = Legal Services**
- **It's a New World**
- **Marathon AND a Sprint**
- **Ways to Contribute**

Mahalo Nui!

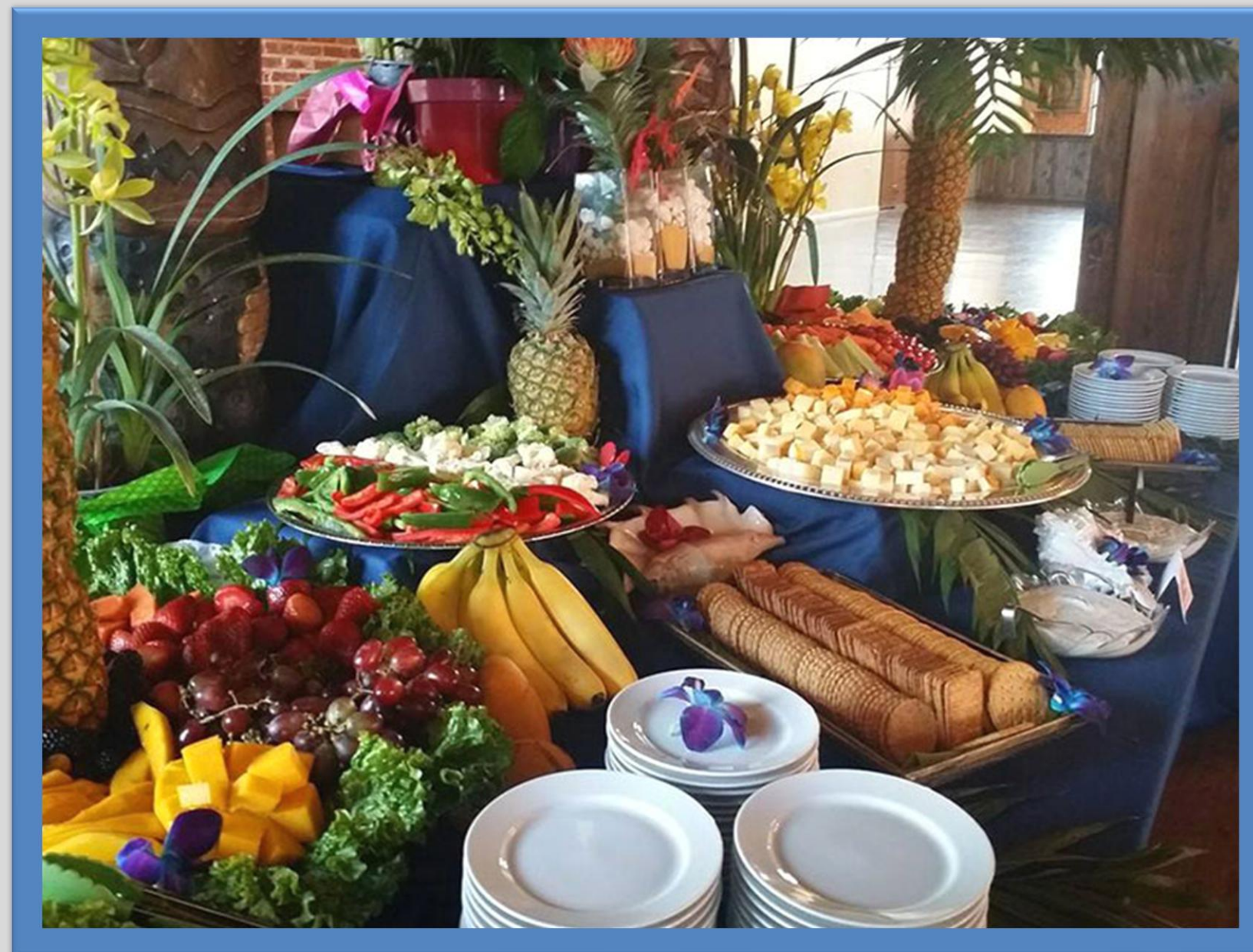




**MONTANA, IDAHO, HAWAII,
ARIZONA, ALASKA**

DAY TWO NOTES

Tonight's Dinner
6:00 – 9:00pm



Tomorrow's Breakfast
7:00 – 9:00am

