

Board Receives Updates on AI Task Force, **ACCESS TO JUSTICE PROPOSALS**

Potential change in dues rates in 2025 discussed.



ABOVE: State Bar of Texas President Cindy Tisdale presents a resolution to Bexar County Judge Peter Sakai and his wife, Raquel “Rachel” Dias-Sakai (center), for exceptional service to the legal profession. PHOTO BY PATRICIA BUSA MCCONNICO

WRITTEN BY **LOWELL BROWN**

THE STATE BAR OF TEXAS BOARD OF DIRECTORS HEARD UPDATES ON ITS ARTIFICIAL INTELLIGENCE TASK FORCE, the Supreme Court of Texas’ access to justice initiatives, and the bar’s long-term budgetary needs on January 26 during its quarterly meeting in San Antonio.

Highlights of the meeting appear below. You can watch video of the meeting and read the agenda and meeting materials at texasbar.com/board.

AI Task Force Update. State Bar President Cindy Tisdale’s Taskforce for Responsible AI in the Law submitted an interim report to the board outlining preliminary recommendations with a focus on ethical and practical integration of AI in legal practice. The report covers topics including continuing education, legal considerations, ethical guidelines, and data protection. The report is available at texasbar.com/bodmaterials under the January 26 meeting materials. In addition, the task force plans to invite stakeholders to an AI summit this spring to continue discussing these issues, Tisdale said.

Access to Justice Proposals. Texas Access to Justice Commission Chair Harriet Miers updated the board on the commission’s work, including its vote in December 2023 on the report and recommendations from its Access to Legal Services Working Group. The commission endorsed the working group’s proposal to allow Supreme Court of Texas-licensed paraprofessionals to represent and assist low-income Texans with certain legal matters but rejected, by a vote of 8-6, a proposal to create a pilot program permitting non-attorney ownership of certain entities providing legal services to low-income Texans.

The working group report and the commission’s recommendations are now before the Supreme Court for consideration, Miers told the board. The working group was formed after the court directed the commission to study possible rule modifications that would “allow qualified non-attorney paraprofessionals to provide limited legal services directly to low-income Texans” and “allow non-attorneys to have economic interests in entities that provide legal services to low-income Texans while preserving professional independence.”

The Supreme Court has received the commission’s report but has not yet taken any action, Justice Evan Young said in his

report to the board. “The State Bar, of course, will have an important role to play in continuing to give us advice and thoughts and perhaps partnership with” new initiatives, including a potential role in regulating paraprofessionals if the court pursues their licensing, Young said. “We will not simply drop something . . . on your plate. That won’t happen. It will be with lots of deliberation and discussion.”

Although the proposals regarding paraprofessionals and non-lawyer firm ownership were not before the board for action, seven members of the bar addressed the board to oppose one or both proposals. Director G. David Smith, who chairs the board’s Affordable Legal Services Subcommittee, said the subcommittee is monitoring the proposals and working with State Bar section chairs and other stakeholders to ensure the bar has a seat at the table as the court considers them.

Finance and Budget. The board approved the State Bar’s fiscal year 2024-2025 proposed budget for publication in the *Texas Bar Journal* (see pages 195-199). A more detailed breakdown of expenditures by category is available at texasbar.com/ourfinances. The bar will hold a public hearing on the budget at 9 a.m. March 21 at the Texas Law Center in Austin before presenting a budget proposal to the Supreme Court of Texas for consideration.

The proposed budget includes no dues increase for the fiscal year starting June 1, 2024, but President-elect Steve Benesh, who chairs the Budget Committee, said the committee is exploring options to address the bar’s long-term needs. “The bar’s budgetary projections are showing that expenditure growth is outpacing revenue growth, and that there is a need for additional revenue,” Benesh said.

Executive Director Trey Apffel said the board may be asked at its April 19 meeting to consider a proposal to increase membership dues by 10% for the fiscal year starting June 1, 2025, to begin addressing the projected revenue shortfalls. “Just to put it in perspective, the last dues increase was in 1991,” Apffel told the board. “The \$235 [maximum dues rate] that was put into place in 1991 is buying about \$94 worth of bar benefits [today].”

To address the bar’s budgetary needs more thoroughly, the board could consider calling a referendum so members could vote on an additional dues increase in late 2025 or 2026, although the exact amount has not been determined, Apffel said. (For more information on a potential dues increase, read the Executive Director’s Page on page 184.)

The board also approved the bar’s financial audit for fiscal year 2022-2023. The State Bar received an unmodified, or “clean,” opinion for its financial audit.

Day of Civility Resolution. The board approved a resolution joining the Supreme Court and Court of Criminal

Appeals in designating April 4, 2024, as the Texas Day of Civility in the Law and encouraging lawyers to participate in local Day of Civility events.

Ombudsman Report. Stephanie Lowe, ombudsman for the attorney discipline system, discussed her office’s annual report, which is available at texasbar.com/annualreports.

Board Chair Election. The board heard comments from two candidates for 2024-2025 chair of the board: Elizabeth Sandoval Cantu, of Edinburg, and Paul K. Stafford, of Dallas. The board will vote in April to elect a new chair.

Recognitions. Tisdale presented resolutions honoring Bexar County Judge Peter Sakai and retired State District Judge Larry Noll. Apffel announced Staff Excellence Awards for Sandra Cuellar, manager of the chief disciplinary counsel’s San Antonio regional office, and Demaj Wiley, associate software developer in the IT department.

Looking Ahead. The next board meeting is scheduled for April 19 in Galveston. If you have comments for the board, email them to boardofdirectors@texasbar.com. To find your district directors, go to texasbar.com/board and click on “Board Members.” **TBJ**

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