



NEW YORK STATE
BAR ASSOCIATION

Report and Recommendations on **Artificial Intelligence and Access to Justice** in 2025

January 2026

Cover Note

To: NYSBA House of Delegates Reports Group

From: President's Committee on Access to Justice

Subject: Report on Artificial Intelligence and Access to Justice in 2025

Date Approved: October 28, 2025

Summary: The attached report, *Artificial Intelligence and Access to Justice in 2025*, was prepared by the President's Committee on Access to Justice (Technology Subcommittee) following a statewide survey and a public hearing held on **May 21, 2025**. The report examines the opportunities and risks associated with integrating artificial intelligence (AI) into civil legal services and makes concrete recommendations on how these technologies should be implemented in regards to its potential to improve access to justice for low-income and underserved communities.

Purpose and Scope:

- **Survey Findings** from 206 respondents across New York's legal services sector, highlighting high awareness but limited adoption of AI tools.
- **Expert Testimony** from a diverse panel of legal professionals, technologists, and court administrators, offering insights into practical applications, governance needs, and ethical considerations.
- **Recommendations** for responsible AI adoption, emphasizing policy development, training, risk management, and equity safeguards, in order to effectively protect the communities we serve.

Key Themes:

- AI as a potential force multiplier for legal services, enabling efficiency and expanded reach.
- Risks including hallucinations, privacy concerns, and digital divides.
- A phased approach to adoption: starting with low-risk, internal applications before client-facing tools.
- The need for clear governance frameworks, training programs, and operational guardrails to ensure ethical and equitable implementation.
- The need for comprehensive policy to create responsible framework for the proper implementation of AI in the delivery of civil legal services and legal services to the poor.

Action Requested:

The Committee respectfully submits this report for review and consideration by the House of Delegates. It is intended to inform policy discussions, make concrete recommendations on how these technologies should be harnessed by the community, and guide future initiatives on AI integration within the legal profession in regards to access to justice.

Attachments:

- Full Report: *Artificial Intelligence and Access to Justice in 2025*
- Appendices: Survey Instrument, Hearing Details, Written Testimony, Guidance Materials

Title Page

Proposed Title: Report and Recommendation on Artificial Intelligence and Access to Justice in 2025

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Contents

Foreword by Vivian D. Wesson	5
Authors.....	6
Acknowledgements.....	7
Thank You to Our Speakers:	7
A Special Thank You to Lisa Colpoys	7
Executive Summary	8
Overview	8
Key Findings.....	8
I. Survey Insights.....	8
II. Hearing Insights	9
III. Strategic Recommendations.....	9
IV. Path Forward.....	10
I. Introduction.....	11
II. Methodology	11
III. Survey Findings	12
IV. Hearing Insights	18
Hearing Description	18
Speaker Matrix with Hearing Insights	19
V. Additional Information and Concerns.....	21
Kristen Sonday – Paladin.....	21
Environmental Challenges Posed by Artificial Intelligence	22
Access to Justice and Disability Rights	23
New York State Courts – Interim AI Policy.....	24
VI. Bringing It Together: Report and Testimony in Context	25
AI and Access to Justice: Building Confidence, Capacity, and Care.....	25
The Baseline: A Workforce That’s Curious and Motivated, Yet Cautious.....	26
From Theory to Practice: Where AI Delivers Today	26
The Tension We Must Name: Direct Client Use vs. Human Care	27
What Trust Requires: Visible Guardrails, Not Just Intent.....	27
The Adoption Playbook: From Motivation to Momentum	28

Risks to Manage, Not Ignore	29
What This Adds Up To: A Pragmatic Path Forward	30
Appendix A – Survey Questions and Presentation	32
Survey Questions Sent to New York State Participants	32
Power Point Presentation of New York State Data Set	35
Appendix B – Hearing Information	48
Appendix C - Submitted Written Testimony	52
Testimony Highlights and Overview	53
Hon. Ron Hedges (Ret.)	53
Scott Reents	53
Aubrie Souza & Zachary Zarnow	54
Jeff Cox	54
Sateesh Nori	55
Randal Jeffrey	56
Lisa Colpoys	56
Alexander Horwitz	56
Sam Harden	57
Testimony of Ron Hedges	59
Testimony of Aubrie Souza and Zachary Zarnow	60
Testimony of Jeffrey Cox	63
Testimony of Sateesh Nori	68
Testimony of Randal Jeffrey	72
Testimony of Lisa Colpoys	76
Testimony of Sam Harden	88
Testimony of Kristen Sondag	94
Appendix D – Sample Gen-AI Policy	97
Sample Gen-AI Policy 1	98
Sample Gen-AI Policy 2	106

Foreword by Vivian D. Wesson

Esteemed Members of the New York State Bar,

As stewards of justice in one of the most dynamic and diverse legal jurisdictions in the country, we find ourselves at a pivotal moment. The rise of artificial intelligence (AI) presents both a challenge and an opportunity—one that compels us to reexamine how justice is accessed, delivered, and experienced across New York State.

This report from the New York State Bar Association’s President’s Committee on Access to Justice explores the intersection of AI and access to justice, with a focus on how emerging technologies can support the legal profession in addressing longstanding inequities. From AI-powered legal research tools and virtual assistants to automated intake systems and predictive analytics, these innovations have the potential to expand legal services to underserved communities, streamline court processes, and reduce barriers to legal representation.

Yet, we must also confront the ethical, procedural, and constitutional questions that AI introduces. How do we ensure transparency in algorithmic decision-making? What safeguards are needed to protect due process and prevent bias? And how can we preserve the human judgment that lies at the heart of our legal system? How do we address issues, such as hallucinations, digital divides, data privacy, and the unauthorized practice of law?

This report does not offer simple answers — but it does offer a framework for thoughtful engagement. It invites us to lead with both innovation and integrity, to shape the future of justice in New York with a commitment to equity, accountability, and the rule of law.

We hope this work serves as a catalyst for dialogue, collaboration, and action among legal professionals, technologists, and policymakers across the state.

Vivian D. Wesson

Chair, Committee on Artificial Intelligence and Emerging Technologies
New York State Bar Association

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Authors' Note: Embracing AI in Report Development

This report was prepared using with Microsoft Copilot, an AI-powered assistant, as part of our commitment to fully embrace emerging technologies and better understand their potential in legal and organizational work. The drafting process utilized structured prompts to guide Copilot's analysis and synthesis of information. The organization, inclusion of certain images, and other aspects of report drafting were completed by the authors.

Copilot's role was focused on reviewing and interpreting the source materials provided, which included testimony and survey data collected for this project. Except where explicitly noted, Copilot did not search the internet or incorporate external sources. The only section where internet-based research was used pertains to the environmental impact discussion.

All recommendations and next steps outlined in this report were synthesized exclusively from the provided source materials. Human oversight was maintained throughout the process to ensure accuracy, context, and alignment with organizational goals.

Acknowledgements

We extend our deepest gratitude to the distinguished panelists who generously shared their time, expertise, and insights during the *Virtual Hearing: Artificial Intelligence and Access to Justice in 2025*, hosted by the New York State Bar Association's President's Committee on Access to Justice. Their contributions were instrumental in advancing the conversation around the transformative role of AI in the legal field and its potential to improve access to justice.

Thank You to Our Speakers¹:

- **Ronald J. Hedges** – Principal, Ronald J. Hedges LLC
- **Scott B. Reents** – Of Counsel, Cravath, Swaine & Moore LLP
- **Aubrie Souza** – Principal Court Management Consultant, National Center for State Courts
- **Zachary Zarnow** – Deputy Managing Director, Access to Justice Team, NCSC
- **Jeffrey Cox** – Director of Global Content Marketing, vLex; Chairperson, Bay Area Legal Services
- **Sateesh Nori** – Senior Legal Innovation Strategist, Just-Tech
- **Randal Jeffrey** – General Counsel, New York Legal Assistance Group
- **Lisa Colpoys** – Senior Consultant, AI Initiative, Lawyers Trust Fund of Illinois
- **Alexander Horowitz** – Chief Operating Officer, Legal Services NYC
- **Sam Harden** – Senior Innovation Manager, Pro Bono Net

Thank you to Kristen Sonday of Paladin for providing written testimony as she was unable to participate in the virtual hearing.

A Special Thank You to Lisa Colpoys

We would like to extend a heartfelt thank you to **Lisa Colpoys** for her extraordinary support and generosity in helping our committee prepare for this hearing and the accompanying survey. Lisa provided invaluable materials, including:

- Sample survey questions
- Results from a similar survey conducted in Illinois
- Sample documents and resources for inclusion in our report

Her contributions not only informed our approach but also shaped the final product. In particular, we adopted Lisa's PowerPoint presentation format for our own, making only minimal adjustments to reflect our data. Her thoughtful guidance and willingness to share her expertise were instrumental to the success of this initiative.

¹ Please find below the list of speakers who participated in the hearings. Kindly note that the titles and roles listed reflect their positions at the time of the hearings. Some individuals may have since transitioned to new roles or organizations. This information is accurate as of the date of the respective hearing.

Executive Summary

This report calls for an intentional, ethics-driven approach to AI adoption in civil legal services and among all providers serving low-income clients. An approach that ensures innovation advances access to justice while embedding safety, transparency, and equity at every step, so the communities we serve are protected from needless and unintentional harm. The proposed framework will allow for proper governance of AI, training on how to use the technology, and the responsible deployment of applications using AI, can foster understanding and buy-in for the enormous potential of this technology to serve low-income communities throughout New York State.

Overview

In 2025, New York’s legal services sector is at a defining point in the integration of artificial intelligence. While awareness of AI is widespread, its integration into daily legal practice remains limited. To better understand this dynamic, the New York State Bar Association’s (NYSBA) President’s Committee on Access to Justice conducted a statewide survey and convened a public hearing featuring expert testimony. These efforts aimed to assess current AI usage, identify opportunities and risks, and chart a path forward for responsible adoption in legal services. For practice guidance and other information regarding the impact on the legal profession, please reference the Report and Recommendations of the New York State Bar Association Task Force on Artificial Intelligence dated April 2024.²

Key Findings

I. Survey Insights

- **High Awareness, Low Adoption:** Among 206 respondents, most reported some familiarity with AI, but only a small fraction had integrated it into their daily workflows. AI remains largely conceptual rather than operational.
- **Current Use Cases:** Where AI is used, it supports tasks such as legal research, writing, form generation, and administrative support—highlighting its role as a productivity enhancer.
- **Tool Preferences:** ChatGPT was the most commonly used AI tool, while legal-specific platforms saw minimal adoption. This trend raises concerns about data privacy and the use of public tools without enterprise safeguards.

² New York State Bar Association – Artificial Intelligence Taskforce, *Report and Recommendations of the New York State Bar Association Task Force on Artificial Intelligence*, Date Accessed, December 11, 2025, <https://nysba.org/wp-content/uploads/2022/03/2024-April-Report-and-Recommendations-of-the-Task-Force-on-Artificial-Intelligence.pdf>

- **Barriers to Adoption:** The top concerns include inaccurate results (67%), ethical implications (53%), data privacy and confidentiality (51%), bias (33%), and lack of skills (29%).
- **Training Needs:** Two-thirds of respondents expressed interest in AI training, with a preference for flexible, on-demand formats. The most requested topics were AI fundamentals, ethics, and hands-on tool training.
- **Organizational Readiness:** Nearly two-thirds of respondents believed their organizations were moderately or highly open to AI adoption, indicating a strong foundation for future initiatives.

II. Hearing Insights

On May 21, 2025, the Committee hosted a virtual hearing titled *Artificial Intelligence and Access to Justice in 2025*, featuring a diverse panel of experts from legal aid, private practice, court administration, and legal technology. Below are some themes from the testimony.

Opportunities:

- AI as a force multiplier, enabling legal professionals to serve more clients efficiently.
- Back-office applications such as knowledge management, finance, and grant reporting are yielding tangible benefits.
- AI tools can assist with legal research, drafting, intake triage, and plain-language conversion, improving service delivery and accessibility.

Risks:

- Hallucinations and inaccurate outputs threaten trust and reliability.
- Digital divides may exacerbate inequities in access to justice.
- Ethical and privacy concerns, including unauthorized practice of law (UPL), require careful governance.

Governance and Deployment:

- Experts advocate for structured, risk-based frameworks, emphasizing human oversight, vendor accountability, and data privacy.
- A phased approach is recommended: begin with low-risk, internal applications, followed by carefully governed client-facing tools.

III. Strategic Recommendations

The combined weight of the survey findings and expert testimony makes one point clear: the civil legal services community—and all who assist low-income clients—must approach AI adoption deliberately, ethically, and with visible guardrails. This is not about chasing technology for its own sake; it is about shaping its use to advance equity and protect those we serve. To do that, the following principles should guide every step:

- **Lead with Policy and Governance, Not Experimentation**
Before deploying tools, organizations should adopt plain-language AI policies that define permitted uses, prohibited practices, and accountability measures. Governance is not a brake—it is the steering wheel that ensures innovation aligns with professional ethics and client protection.
- **Invest in Capacity and Competence**
The survey revealed a “curious-but-not-confident” workforce. Upskilling through microlearning and role-specific training is essential. Staff must understand not only how to use AI, but how to verify outputs, manage risks, and uphold confidentiality.
- **Start Where Risk Is Low and Oversight Is Strong**
Begin with internal, staff-facing applications (e.g. research, drafting, administrative workflows) where human review is already standard. These pilots should include clear success metrics and audit trails to build trust and demonstrate value.
- **Engineer Trust Through Operational Guardrails**
Trust cannot be assumed; it must be built. That means enterprise-grade tools with zero data retention, retrieval-augmented grounding to authoritative sources, mandatory human verification, and documented ethics checks. These safeguards turn understandable fear into verifiable safety.
- **Sequence Client-Facing Tools Carefully**
Direct-to-client AI should come later, and only after governance, training, and evaluation systems are proven. When introduced, these tools must include disclaimers, escalation paths to humans, multilingual access, and offline alternatives to avoid widening the digital divide.
- **Address Systemic Barriers and Equity Risks**
Move cautiously but deliberately to examine rules—such as those governing unauthorized practice of law—that may unintentionally block innovation, while still working to understand how they protect consumers. Begin with dialogue and incremental steps rather than sweeping changes, ensuring that any adjustments prioritize client safety and public trust. At the same time, commit to equity by monitoring whether AI adoption risks deepening resource gaps or excluding those without reliable digital access, and build safeguards to prevent those harms.

IV. Path Forward

AI is already transforming the legal landscape and will shape the future of legal services whether we act or not. The question is no longer whether to adopt it, but how to do so with care and accountability. Our responsibility is to shape it intentionally. Anchored in ethics, equity, and evidence so that technology amplifies, rather than erodes, the mission of equal justice.

By beginning with low-risk, high-impact applications and pairing them with strong governance, targeted training, and robust infrastructure, New York’s legal services community can harness AI to expand access to justice, improve efficiency, and uphold the highest ethical standards. As one panelist observed, governance and human judgment are not obstacles—they are the steering wheel that guides progress.

I. Introduction

In 2025, the legal services community in New York stands at a pivotal juncture in the evolution of artificial intelligence (AI). While awareness of AI is widespread, its integration into everyday legal practice remains limited. To better understand this dynamic, the New York State Bar Association's (NYSBA) President's Committee on Access to Justice initiated a statewide effort to gather perspectives from legal professionals and subject-matter experts, including through a survey and a public hearing.

The insights that emerged reveal a field that is both curious and cautious marked by strong interest in AI's potential but tempered by concerns around accuracy, ethics, privacy, and confidentiality. Legal professionals report growing familiarity with AI tools, yet few have adopted them in their daily workflows. Expert perspectives shared during a public hearing in May 2025 further illuminated the opportunities and challenges ahead, emphasizing practical applications, ethical considerations, and the promise of AI to expand access to justice for underserved communities.

Together, these perspectives offer a timely snapshot of where the legal field stands today and suggest a pragmatic path forward: begin with low-risk, high-impact use cases, such as administrative support, while building the governance, training, and infrastructure necessary to responsibly scale innovation. As one speaker aptly noted, "Governance and human judgment are not the brakes; they are the steering wheel."

II. Methodology

The following synthesis incorporates data from two complementary inputs: (1) the **NYSBA AI Usage Survey** (N=206), and (2) **written and oral testimony** presented to the NYSBA President's Committee on Access to Justice during hearings held in May 2025.

The survey offers quantitative insights into respondents' familiarity with artificial intelligence, current adoption levels, and emerging use cases across New York's legal landscape. At the hearings, panelists, recognized experts in the field, were invited to share their perspectives on the intersection of AI and access to justice. Their contributions included both prepared remarks and responses to the following guiding questions:

1. What excites you about the potential of AI to improve access to justice?
2. What concerns do you have about the use of AI in this context?
3. In your view, how should we be using AI to advance access to justice that we may not be doing currently?

Together, the survey data and expert testimony provide a timely and multifaceted understanding of how artificial intelligence is shaping, and could further shape, access to justice in New York.

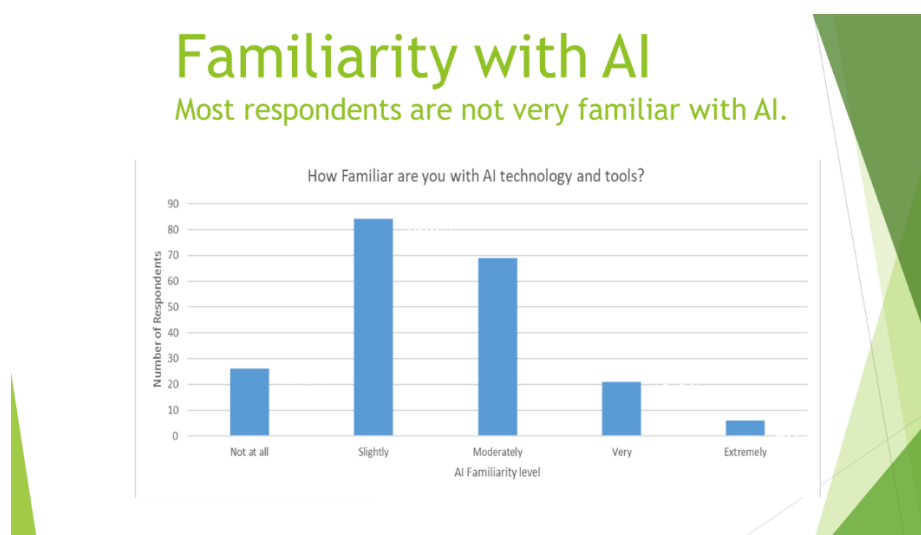
III. Survey Findings

Framing the Survey: Questions, Measures, and Respondents

In early 2025, the NYSBA Presidents Committee on Access to Justice fielded a short survey³ to understand where New York’s legal services community stands on artificial intelligence: awareness and day-to-day use, perceived benefits and obstacles, and what kinds of training and safeguards people want before moving further.

The instrument, designed to be completed in **5–10 minutes**, included **15 questions** (10 on AI use and opinions; 5 follow-ups). The survey remained open from **February 3 to April 9, 2025 (75 days)** and captured **206 responses** from **715 employees** New York legal services professionals, a **28.8% response rate**, reached through NYSBA channels and emails sent by leadership at various legal services organizations. This is the first field-wide reading designed to serve as a baseline for policy, training, and pilot design.

Current Landscape: High Awareness, Limited Adoption

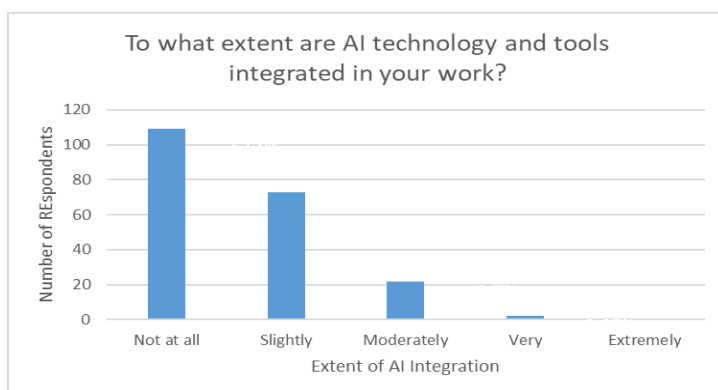


The overall picture is consistent and clear: most respondents have heard enough about AI to place themselves somewhere on the familiarity spectrum, but only a small minority consider themselves experts. The majority fall into the “Slightly” or “Moderately” familiar categories, while those identifying as “Very” or “Extremely” familiar represent a small fraction. Although a few respondents reported being “Not at all” familiar, this group is not predominant. These results reveal a substantial middle cohort—individuals who are aware of AI but have had limited opportunities to engage with it in their day-to-day legal workflows.

³ Full survey and Microsoft Power Point presentation are annexed at Appendix A.

Current Use of AI

OVER 88% do not use AI or use it only slightly in their work.



Daily integration of AI remains cautious. A majority of respondents report no active use in their workflows, and only about 1% describe AI as “very” integrated into their work. In short, AI is largely conceptual, recognized in theory but not yet embedded in routine practice. This gap between awareness and application represents the central change management challenge for 2025. A substantial portion of the field is ready to learn, but lacks the time, guidance, and institutional support to experiment safely and effectively.

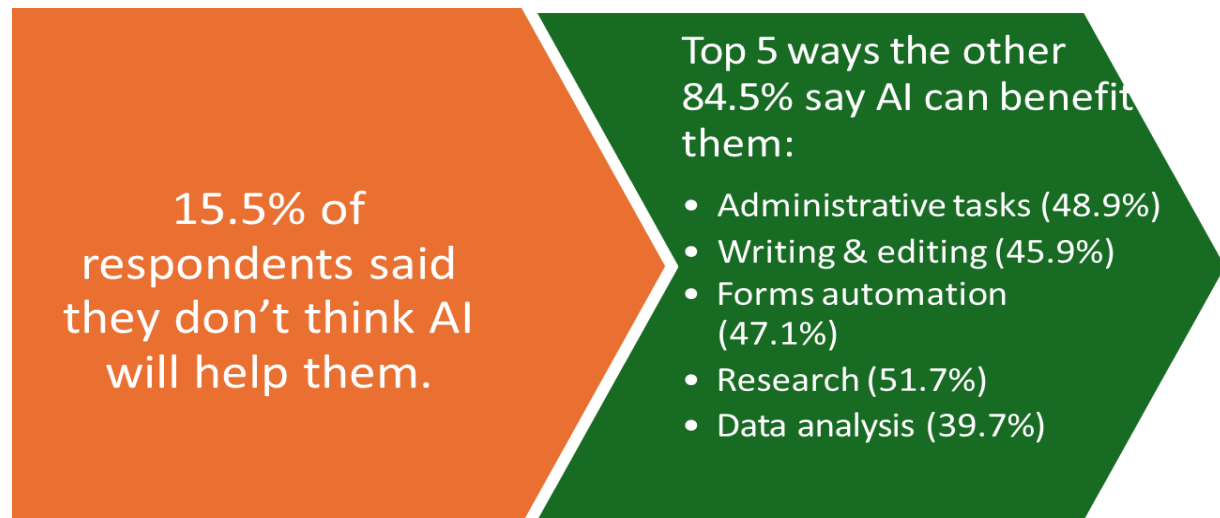
AI in Practice: Current Uses and Future Expectation

Over half (55%) of respondents said they don't use AI at all in their work.

Top 5 ways the other 45% use AI:

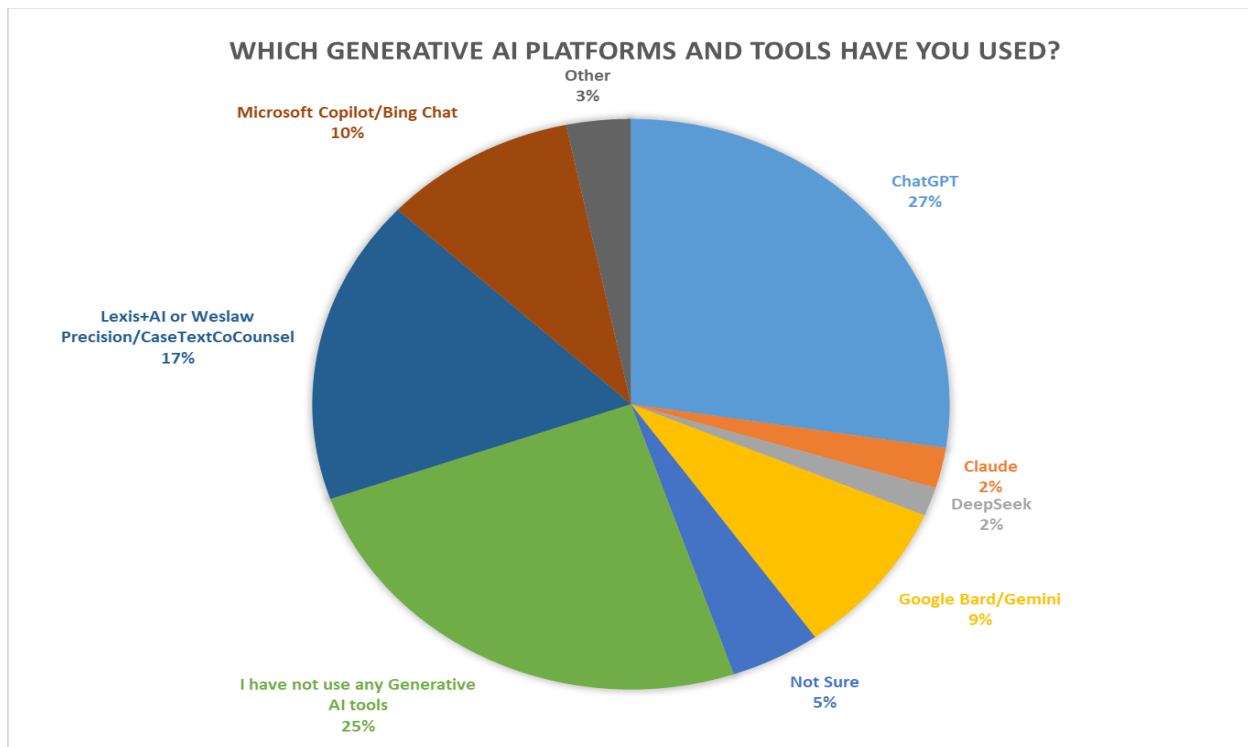
- Writing & editing (41.9%)
- Brainstorming & ideation (29.3%)
- Research (57.0%)
- Administrative tasks (22.2%)
- Forms Automation (28%)

Among those currently using AI, activity tends to cluster around tasks that enhance knowledge work, such as legal research, writing, editing, brainstorming and ideation, form generation, and administrative support. This pattern reflects the nature of legal practice: AI is most attractive where it can efficiently synthesize existing information, generate or refine language, and help assemble routine documents. These use cases highlight AI's role as a productivity enhancer rather than a transformative tool—at least for now.



The same categories where AI is currently being used, as seen below: legal research, writing, forms, and administrative tasks, are also where respondents believe it holds the greatest potential. Notably, data analysis emerged as a promising but underutilized area, with many seeing untapped opportunities within existing document repositories and case management systems. This alignment between current use and perceived benefit suggests a practical path forward for pilot programs: begin with back-office and staff-facing tasks, where the value is immediate and the risks are relatively low.

Current AI Tool: Widespread Use of Public Models, Limited Legal-Specific Integration



A significant portion of respondents report no use of generative AI tools. Among those who do, ChatGPT is by far the most commonly used, while legal-specific products show very low adoption. This pattern is typical in early adoption phases—users gravitate toward widely available consumer tools first. However, it raises important policy and privacy concerns, especially when staff rely on non-enterprise accounts or platforms lacking contractual protections like zero data retention.

This trend also highlights a training opportunity: staff are experimenting where they can, often without formal guidance. Organizations should respond by offering approved, secure alternatives and providing a concise “when to use what” guide to support safe and effective adoption.

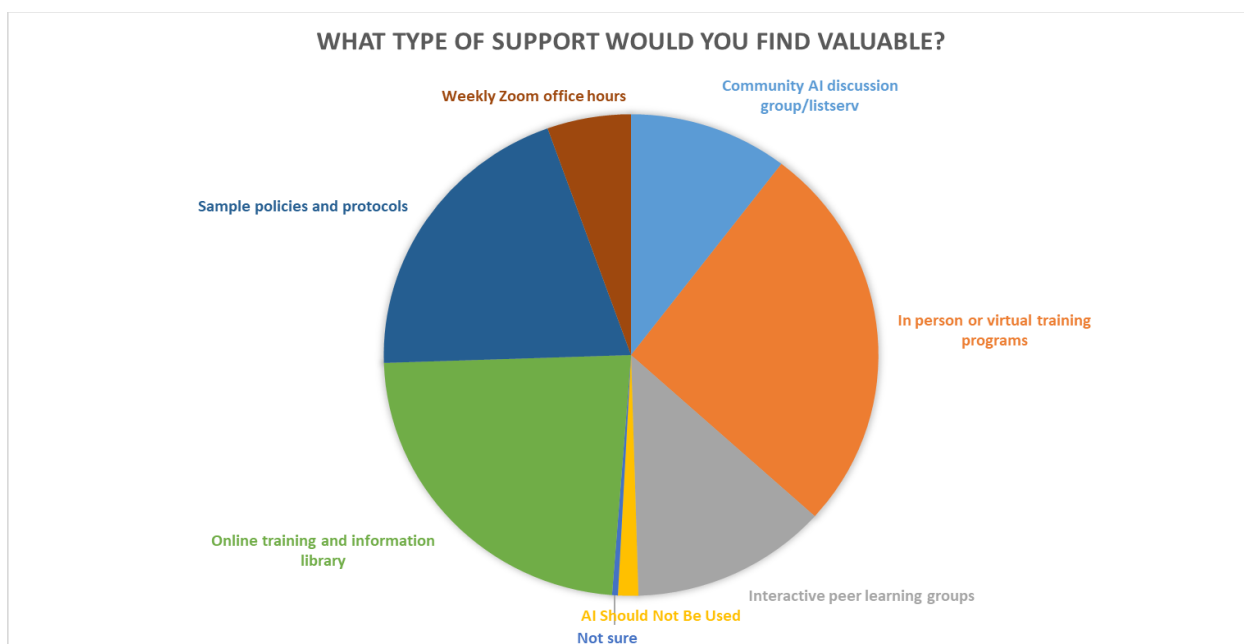
What’s Holding AI Back: Trust, Ethics, and Confidentiality Concerns

Across the board, the leading concern is inaccurate results—cited by approximately 67% of respondents—reflecting widespread awareness of issues like AI “hallucinations.” A second tier of serious concerns includes ethical implications (~53%), data privacy and security (~51%), and confidentiality (~51%). Additional concerns include bias (~33%) and a skills gap (~29%), with a small but notable group highlighting environmental impact. This concern profile closely mirrors testimony from judges, court administrators, and legal aid leaders: the legal field does not need to choose between safety and progress—but must embed safety into the path forward.

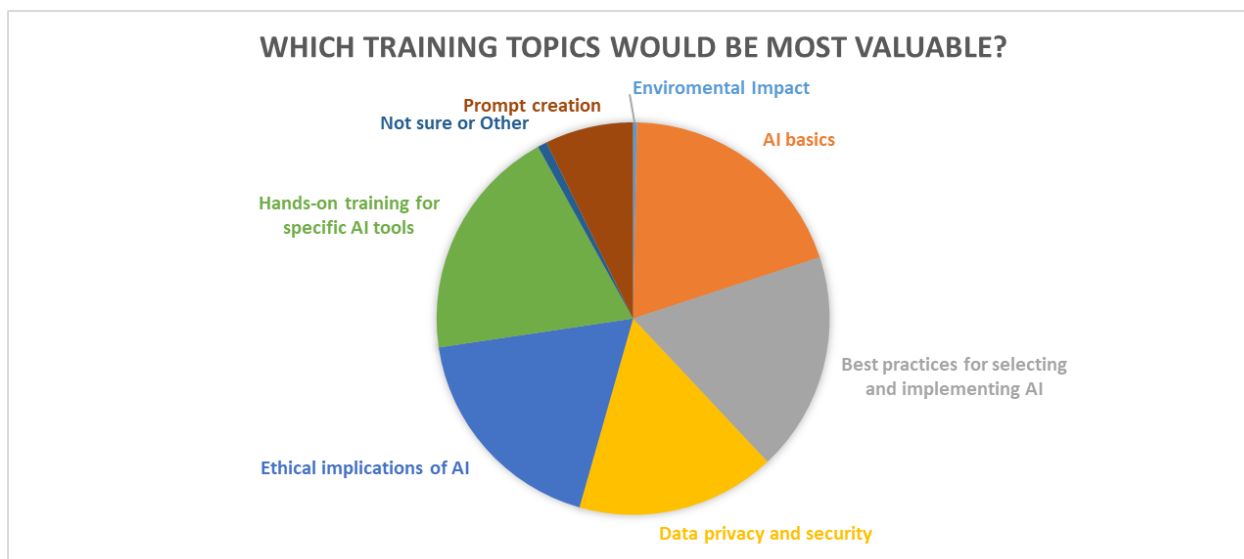
Momentum for Adoption: Motivated Staff, Supportive Leadership

Surveyed staff report higher personal motivation to use AI than their current levels of familiarity or usage would suggest. Encouragingly, nearly two-thirds perceive their employer as moderately or highly open to AI adoption. Together, these findings point to a strong foundation for piloting AI initiatives: the interest and institutional openness are already in place, but skill development and structural support are lagging. If leadership can provide clear policies, targeted training, and access to approved tools, this motivated cohort is well-positioned to move quickly from curiosity to competence.

What help people want: basics, ethics, and hands-on practice—delivered flexibly



Two-thirds of respondents expressed interest in AI training, with a current preference for passive formats such as on-demand materials over interactive sessions. The most requested topics—AI fundamentals, ethics, and hands-on tool training—were nearly equally prioritized, each cited by approximately 61% of respondents. These findings support a phased enablement strategy. **Phase One** – Asynchronous modules (e.g., AI 101 → 201) to build foundational knowledge across the organization. **Phase Two** – Role-specific clinics and office hours to translate knowledge into practical, workflow-based skills. This approach meets staff where they are—curious, cautious, and ready to learn—while building toward confident, responsible use.



IV. Hearing Insights

Hearing Description

On **May 21, 2025**, the **New York State Bar Association’s President’s Committee on Access to Justice** convened a virtual hearing titled *Artificial Intelligence and Access to Justice in 2025*. Held via Zoom, the two-hour session brought together a diverse panel of experts to examine the evolving role of artificial intelligence (AI) in the legal system, particularly its potential to improve access to justice for low-income and underserved communities.

The hearing served as a platform for thought leaders across legal services, private practice, court administration, and legal technology to share insights, raise concerns, and propose pathways for responsible AI integration. Testimony focused on both the promise and the risks of AI, with particular attention to how it might enhance legal service delivery, streamline routine processes, and support more equitable outcomes—while also safeguarding ethical standards, privacy, and confidentiality. Speakers addressed a range of topics, including: The use of AI in legal research and case management; The importance of protecting attorney-client privilege in AI-enabled workflows; The potential for AI to predict legal outcomes and automate administrative tasks and Ethical governance and the need for clear regulatory frameworks.

A full list of the panelists along with biographies is available at Appendix B. The testimony is also in Appendix B along with an AI analysis of the testimony gather.

Together, their testimony provided a rich, multi-dimensional view of how AI is currently being explored in legal contexts, what safeguards are needed, and where the greatest opportunities lie. The hearing underscored a shared commitment to innovation that is both impactful and ethically grounded reinforcing the importance of building safety into the way we progress. A Matrix of these views along with their optimism or cautious take on the use of AI is below.

Speaker Matrix with Hearing Insights

- **Stance legend:** ● Optimistic · ● Balanced · ● Cautious
- **AI & Access to Justice — Speaker Matrix**

Speaker	Excited About (Opportunities)	Concerns (Risks)	Governance / Guardrails	Deployment Approach	Overall Stance
Lisa Colpoys	Expanding A2J, efficiency, structured enablement (webinars, cohorts, micro-grants)	Resource disparities; accuracy/ethics/privacy	Guardrails; vendor guidance; ethics frameworks; policy dev	Start with problem ID; structured training/support programs	● Optimistic
Randal Jeffrey	Transformative potential; internal (research/drafting) + external (intake, client comms)	Hallucinations; privacy; UPL risk	Community dialogue; RAG for accuracy; client-centered	Internal/external assistants; phased with human oversight	● Balanced (optimistic)
Hon. Ron Hedges (Ret.)	Form-based intake; drafting/research/chatbots; plain-language	Digital divide; hallucinations; costs; UPL	Clear definitions; boundary setting	Start with low-risk tasks; maintain human review	● Balanced
Sam Harden	Capacity gains; assistants; SRL personalization; rapid prototyping	Vendor accountability; hallucinations; over-regulation	Light-touch regulation + accountability; security/privacy	User testing; in-house pilots; agile iteration	● Optimistic (with safeguards)
Sateesh Nori	“Force multiplier”; D2C empowerment; legal education reform	UPL as barrier; quality control; cultural inertia	Risk-based, outcomes-focused regulation;	Staff-facing first → consumer tools; UPL	● Optimistic / Reform-oriented

Speaker	Excited About (Opportunities)	Concerns (Risks)	Governance / Guardrails	Deployment Approach	Overall Stance
			transparency; vendor accountability	reform/sandboxes; integrate AI training	
Jeff Cox	Scaling capacity; personalization; ops benefits (fundraising/admin); data governance	Equity/cost barriers; policy gaps; data misuse; UPL debates	Zero-retention deals; privacy/confidentiality frameworks; responsible use	Intake triage; call-center support; eligibility; asset tagging; non-legal tasks	● Balanced (pragmatic)
Aubrie Souza & Zach Zarnow	User-centered innovation; plain-language; court support; efficiency	Hallucinations; public trust; vendor hype; digital divide; privacy/sustainability	Independent evaluation; procurement vigilance; human-in-the-loop	Start with internal court ops; low-risk staff tools; content management	● Balanced / Cautious
Alexander Horwitz	Back-office wins: knowledge mgmt; finance AR/AP; grants; data/analytics; limited discovery support	Client-facing reliability; loss of nuance/care; QC limits in high-volume intake	“Safe integration” principle; share learnings with LSC grantees; transparency	Prioritize internal use; no client-facing tools (for now); cautious pilots	● Cautious (internal-optimistic)
Scott Reents	Cost reduction; 3-domains (litigants/lawyers/courts); experience amplification	Downstream volume on courts; speed harms in some contexts; reliability	Responsible-use training before access; clear “do-nots”	Get AI into lawyers’ hands now; tool-specific + responsible-use trainings	● Balanced (optimistic)

V. Additional Information and Concerns

Kristen Sondag – Paladin

Overview: Artificial intelligence offers one of the most promising pathways to democratize legal information and bridge the justice gap. Yet, its success hinges on more than technological capability—it requires collaboration, robust safeguards, and a commitment to equity. Without targeted funding and shared infrastructure, legal services organizations risk diverging into a two-tiered system where some scale exponentially while others fall behind. Case studies from across the country—ranging from AI-powered chatbots that deliver plain-language legal guidance to automated expungement tools and document review systems—illustrate that these innovations are not theoretical; they are replicable models that can transform service delivery. The challenge now is ensuring that every organization has the resources and frameworks to adopt them responsibly and effectively.

- AI as a Transformational Opportunity
 - Sondag emphasizes that AI can dramatically increase scale and speed for legal aid organizations (LSOs), addressing chronic underfunding, staff shortages, and rising demand.
 - AI is positioned as essential, not optional, for closing the justice gap.
- Successful Use Cases
 - Expungement Automation (Tennessee): AI-generated petitions reduced manual work and cleared 324 charges for 98 people in one day.
 - Case Review (California Innocence Project): AI sifted thousands of pages, extracted contradictions, and proposed questions—critical for wrongful conviction cases.
 - Legal Information Chatbot (North Carolina): LIA provided plain-language legal guidance, reaching 95,000 views in months.
 - Housing Court Answers (NYC): Dual AI tools for staff and tenants improved efficiency and access.
- Key Concerns
 - Accuracy & Safety: Risk of hallucinations and incorrect guidance; human-in-the-loop models are essential.
 - Equity & Resource Divide: LSOs with funding can scale; others risk falling behind, creating a two-tiered system.
 - Ethical Deployment: Need for safeguards, transparency, and collaboration.
- Recommendations
 - Start with well-scoped use cases (e.g., FAQs, intake notes).
 - Build shared infrastructure: vetted knowledge bases, pre-trained models.
 - Promote open-source blueprints and public-private partnerships for equitable access.

Environmental Challenges Posed by Artificial Intelligence

The rapid expansion of AI technologies is creating significant environmental pressures. Training and deploying large-scale AI models require immense computational resources housed in data centers, which consume vast amounts of electricity and water. “Global electricity demand from data centers is set to more than double to 945 TWh by 2030, equivalent to Japan's current total power consumption, as artificial intelligence drives unprecedented growth in the sector's energy needs”⁴. These facilities also rely heavily on water for cooling, “training the GPT-3 language model in Microsoft’s state-of-the-art U.S. data centers can directly evaporate 700,000 liters of clean freshwater”⁵.

Moreover, the hardware powering AI systems (e.g. GPUs, CPUs, and servers) has short lifespans, contributing to electronic waste. “Generative AI could account for up to 5 million metric tons of e-waste by 2030, according to a new study”⁶. This lifecycle impact includes resource-intensive manufacturing processes that depend on rare minerals and energy-intensive fabrication, further increasing the carbon footprint. “AI hardware production necessitates critical minerals and rare earth elements, including lithium, cobalt, and various rare earth metals, and the manufacturing of semiconductors is an especially energy and chemical-intensive process”⁷.

Without aggressive measures to improve energy efficiency, adopt renewable power, and implement sustainable hardware practices, AI’s environmental burden risks undermining global climate and sustainability goals.

For legal services organizations, these realities matter. While AI tools promise efficiency and improved client service, they also carry hidden environmental costs. . However, these tools come with hidden environmental costs, energy-intensive data centers, water usage for cooling, and hardware that contributes to electronic waste. Awareness of these impacts is essential for aligning technology adoption with sustainability goals. Rather than prescribing vendor checklists—which may be impractical for resource-constrained nonprofits—this report encourages organizations to stay informed, ask basic questions about energy sourcing and lifecycle practices when feasible, and advocate for greener standards in the broader technology ecosystem.

By recognizing these challenges early, the legal community can participate in conversations about responsible AI development and push for solutions that balance innovation with environmental stewardship.

⁴ International Energy Agency, *Energy and AI Report* (2025). [IEA \[iea.org\]](https://www.iea.org)

⁵ Li et al., Making AI Less “Thirsty” (2023). [arXiv \[arxiv.org\]](https://arxiv.org)

⁶ MIT Technology Review, AI Will Add to the E-Waste Problem (2024). [MIT Tech Review \[technologyreview.com\]](https://www.technologyreview.com)

⁷ Sustainability Directory, *Circular Economy Models for Sustainable AI Hardware Production* (2025). [Prism \[prism.sustainabilitydirectory.com\]](https://prism.sustainabilitydirectory.com)

Access to Justice and Disability Rights

The New York City Bar Association’s Presidential Task Force on Artificial Intelligence and Digital Technologies examines how artificial intelligence systems can both benefit and harm people with disabilities. In a report titled, *The Impact of the Use of AI on People with Disabilities*⁸, it concludes that current AI development frequently excludes, misrepresents, or disadvantages disabled individuals.

The report documents extensive evidence that AI systems, particularly generative AI tools, reinforce harmful stereotypes, misrepresent disability as primarily physical or tragic, and produce inaccurate or biased outputs. Because many AI systems are trained on largely inaccessible and non-inclusive data, these harms are often amplified rather than mitigated, especially for people whose needs fall outside the statistical “average” that most models prioritize.

While acknowledging AI’s potential as an accessibility tool, such as generating summaries of inaccessible content or enabling personalized communication, the report emphasizes that inaccuracies, bias, and statistical discrimination pose serious risks for people with disabilities. These risks arise in areas including employment, education, public benefits, healthcare, voting, and access to services.

The Task Force highlights that AI driven decision making and regulatory frameworks relying on aggregate statistical analysis frequently fail to capture the individualized and highly varied nature of disability. As a result, discrimination is often overlooked or dismissed as anecdotal.

To address these concerns, the report sets forth ten recommendations centered on disability inclusive design and governance. Key recommendations from their report are annexed below:

“1. Enshrine the Principle of “Nothing About Us Without Us”: Include people with disabilities at every stage, from ideation to deployment, based on the principles of “nothing about us without us, and everything is about all of us.”

2. Mandate Full Accessibility in AI Development: Require AI content creation and consumption tools to be fully accessible to people with disabilities in alignment with existing regulations and standards such as those identified in this analysis.

3. Require the Inclusion and Weighting of Disability Data: Mandate accessibility data inclusion in AI training sets, and weight underrepresented experiences accordingly. Instances unique to disabled users should be positively weighted to avoid exclusion by majority-centric models.

⁸ New York City Bar Association’s Presidential Task Force on Artificial Intelligence and Digital Technologies, *The Impact of the Use of AI on People with Disabilities*, Date Accessed December 11, 2025 <https://www.nycbar.org/reports/the-impact-of-the-use-of-ai-on-people-with-disabilities/>.

4. Establish Standardized, Sector-Specific Accessibility Benchmarks: Standardize accessibility benchmarks in generative and assistive AI evaluations much like WCAG does for web content. **5. Support Hybrid AI Architectures:** Support and encourage hybrid AI architectures by combining deterministic accessibility rules with machine learning.

6. Invest in Domain-Targeted (Artificial Specific Intelligence) Systems: Invest in and prioritize specific, domain-targeted models, not just generalpurpose models.

7. Guarantee Non-AI Alternatives and Human-Centric Options: This recommendation applies to both AI decisions (e.g., who is employed or admitted; who receives services; who is audited; who is deemed a security threat; and what medical help a person qualifies for) and AI services (e.g., captions). People should be able to say that AI is not going to make a fair decision, and they want a human alternative because they are not average or fairly represented in the training data. Human alternatives should be equivalent in convenience, cost and timeliness. In certain contexts (e.g., education and employment), it is important to ensure that people can always access human-created or supervised alternatives to AI (e.g., live captioners and human interpreters). Since AI captions are now taken for granted, it is harder to get human captioners in some situations.

8. Foster Ongoing, Community-Led Testing and Feedback: AI systems must undergo real-world evaluation by diverse users with disabilities to swiftly identify and remediate emerging harms, inaccuracies, or unintended side effects.

9. Bolster Transparency, Documentation, and Accountability: AI providers should be required to document both the sources and the design decisions underpinning their systems' treatment of disability. Accessible complaint and redress mechanisms are essential for individuals to report exclusion, inaccuracy, or discrimination.

10. Strengthen Legal and Regulatory Safeguards: Policymakers should review and strengthen anti-discrimination frameworks for AI, ensuring that unique and individualized forms of harm affecting disabled people are recognized and addressed—rather than being dismissed as “anecdotal” or insignificant by statistical measures.”⁹

New York State Courts – Interim AI Policy

The New York State Unified Court System’s Interim Policy on the Use of Artificial Intelligence establishes guardrails for the responsible, ethical, and secure use of AI by judges and nonjudicial court employees.¹⁰ The policy applies to all UCS personnel and governs AI use on UCS-owned devices as well as any UCS-related work performed on personal devices. It emphasizes that AI,

⁹ Id.

¹⁰ New York State Courts, *New York State Unified Court System Interim Policy on the Use of Artificial Intelligence*, Date Accessed, December 11, 2025 <https://www.nycourts.gov/LegacyPDFS/a.i.-policy.pdf>

particularly generative AI, is a productivity tool rather than a substitute for human judgment and that all users remain fully accountable for any work product produced with AI assistance.

The policy recognizes limited and appropriate uses of generative AI, such as drafting preliminary documents, revising language for clarity and accessibility, summarizing lengthy materials, and generating ideas. At the same time, it warns that generative AI systems can produce inaccurate, fabricated, biased, or offensive content and are unsuitable for legal research or legal writing without independent verification. The policy highlights risks related to bias, hallucinations, and misinformation, as well as the serious vulnerability of confidential information when using public-model AI platforms. Users are expressly cautioned that information entered into public AI systems may become permanently accessible and beyond court control.

To mitigate these risks, the policy imposes mandatory requirements and restrictions. UCS users may only use AI tools approved by the Division of Technology and Court Research and must complete required AI training before use. Confidential, privileged, personally identifiable, or case-related information may not be entered into public-model AI systems under any circumstances, including documents filed with or submitted to the courts. All AI-generated content must be thoroughly reviewed to ensure accuracy and to avoid bias or inappropriate material. The policy also affirms that existing ethical rules governing judges and court employees continue to apply, including judicial responsibility for decision-making and prohibitions on bias or improper disclosure. Overall, the policy frames AI as a helpful but limited tool that must be carefully controlled to protect fairness, confidentiality, and public trust in the judiciary.

VI. Bringing It Together: Report and Testimony in Context

AI and Access to Justice: Building Confidence, Capacity, and Care

The access-to-justice community stands at an inflection point. On one side is a persistent, well-documented justice gap in which low-income Americans receive little or no help for the vast majority of their civil legal problems. On the other side is a set of maturing AI capabilities that, if deployed thoughtfully, can expand capacity, sharpen quality, and modernize systems. The question is no longer whether AI will transform legal services; it already is. The question is whether we will shape that transformation to advance equity, protect people, and measurably close the gap.

This narrative integrates two kinds of evidence: what legal aid professionals say they need and fear (the survey) and what experienced practitioners and court innovators have tried, learned, and recommend (the testimony). Taken together, they point to a practical path: start where value is high and risk is low, upskill the large “curious-but-not-confident” middle, engineer trust with

visible guardrails, and build toward carefully-supervised client-facing uses only when governance, data, and evaluation are in place.

The Baseline: A Workforce That’s Curious and Motivated, Yet Cautious

Across the legal aid community, interest outpaces adoption. In the statewide survey of legal aid professionals, nearly nine in ten reported they were either not using AI or using it only slightly in their work, yet about half said they were moderately or more motivated to use it, and nearly two-thirds believed their organizations were open to AI. The top anticipated benefits clustered around administration, drafting, research, forms automation, and translation—work that lawyers and staff already do and that fits cleanly into existing review flows. The leading concerns were equally clear: accuracy (hallucinations), ethics, privacy/security, confidentiality, bias, and lack of skills. In short: the will is there; the know-how and the guardrails are not—yet.

That ambivalence is not resistance; it’s an invitation. The largest segment of the workforce sits in a “curious-but-not-confident middle.” They don’t need persuasion about AI’s potential; they need practical learning connected to daily tasks, clear rules for safe use, and tools they can trust.

From Theory to Practice: Where AI Delivers Today

Testimony from law firm, court, and legal aid leaders converged on one big idea: AI is a force multiplier when it supports people in the work they already do.

For legal aid organizations, the most successful implementations so far are back-office accelerators. Legal Services NYC described how a private large language model (LLM) now powers knowledge management: it ingests long practice documents, drafts concise summaries, and makes material findable across practice areas and borough offices. Finance departments use AI to reduce overtime in accounts payable/receivable and grant reporting. Data teams use AI to analyze poverty distributions and connect geography to legal need. Each of these wins saves time, improves quality, and does not expose clients to unvetted outputs.

For lawyers, AI is best understood as a first-pass collaborator. Experienced attorneys noted that modern models can sift vast material and produce a solid starting point “90% of the time”—as long as outputs are grounded to authoritative sources and reviewed by a human. That pairing—grounded output + human verification—is the spine of responsible use.

For courts, experts urged a “walk before you run” approach: apply AI to content management, plain-language rewrites, triage aids, and document review—places where subject-matter experts remain in the loop, where risk is bounded, and where impact is measurable.

Taken together, these experiences echo the survey’s instinct: begin with internal, low-risk, high-value use cases that naturally accommodate human review and auditable grounding.

The Tension We Must Name: Direct Client Use vs. Human Care

The most contested question is how—and when—to put AI in front of clients. Proponents argue that because most people will never get a lawyer, withholding well-designed tools perpetuates inequity. They point to examples (e.g., automated document engines, direct-to-consumer guidance tools abroad) that help unrepresented people file forms, send demand letters, and navigate discrete procedures.

Skeptics counter with a deeply practical concern: people don’t arrive with legal problems alone—they arrive with life problems. A client who asks only, “What time is my court date?” might also need childcare, transportation, medical help, or safety planning. A skilled intake worker or social worker uses the “simple” question as a doorway to holistic screening and trust-building. Today’s AI can answer the explicit question; it struggles to sense what’s unsaid. That is not a reason to ban tools; it’s a reason to sequence deployment and design in human contact points where nuance, empathy, and ethical judgment matter most.

The shared ground between both camps is a pragmatic one: client-facing AI should come later, not first, and only with strong governance, transparent grounding, clear disclaimers, escalation paths, and supervised hand-offs to humans.

What Trust Requires: Visible Guardrails, Not Just Intent

Trust Must Be Engineered: Four Operational Pillars

Both the survey and testimony converge on one principle: trust cannot be assumed—it must be built into the system. Four recurring ingredients define that trust:

1. Protected Environments:
 - Use enterprise or private AI models with zero data retention, tenant isolation, and organization-level sign-in.
 - Sensitive content should never enter public tools that train on user prompts.
2. Grounded Outputs with Citations
 - Pair generation with retrieval-augmented grounding to approved authorities—statutes, regulations, court rules, vetted memos, and templates.
 - Require inline citations and link-back verification so reviewers can quickly confirm accuracy.
3. Human Review & Auditability
 - Implement reviewer checklists, mandatory sign-off, and prompt/output logging.
 - Standardize “limitations” sections in deliverables to surface model gaps, known risks, and unchecked assumptions.
4. Ethics, Bias, and Privacy Checks

- Use structured prompts for fairness reviews (e.g., “*List potential equity impacts; suggest mitigations*”).
- Integrate redaction filters before any external calls or sharing.
- Align usage with Rules of Professional Conduct—competence, confidentiality, supervision—and document compliance.

These are not abstract ideals; they are operational controls that turn understandable fear into verifiable safety.

The approach recommended in this report is consistent with, and reinforced by, the New York State Unified Court System’s Interim Policy on the Use of Artificial Intelligence, which adopts many of the same core principles. Like the framework proposed here, the courts’ policy emphasizes AI as a supportive tool rather than a substitute for human judgment. It requires mandatory training, restricts use to approved platforms, prohibits the entry of confidential or case-related information into public AI systems, and mandates human review of all AI-generated work product. The courts have similarly embraced a risk-based, phased approach that prioritizes internal staff uses before higher-risk applications and grounds AI adoption in existing ethical obligations related to confidentiality, bias, and accountability. Taken together, the court system’s policy demonstrates that the guardrails and governance structures recommended in this report reflect an emerging consensus on how AI can be responsibly integrated into the legal ecosystem while safeguarding public trust and access to justice.

The Adoption Playbook: From Motivation to Momentum

The survey’s “motivated middle” and the testimony’s “walk first” path converge into a concrete adoption sequence:

Step 1: Set the Lane (Policy + Tooling + Intake).

Adopt a short, plain-language AI Policy that clarifies purpose, permitted uses, prohibited uses, supervision, documentation, and consequences. Maintain a living Tool List with three buckets:

- Approved (enterprise tools, zero retention, scoped use cases);
- Restricted (allowed only without client data or with specific safeguards);
- Prohibited (public tools with retention or unclear licensing).

Wrap new ideas in a one-page Pilot Intake: use case, data sensitivity, grounding corpus, reviewer, success metrics, review date (30–60 days).

Step 2: Upskill the Middle with Micro-Learning.

Deliver 15–30 minute modules tied to real work: research memos with citators; client letters from intake notes; checklists turned into guided interviews; spreadsheet cleanup; meeting minutes and task summaries. Embed “verify-before-trust” flowcharts, prompt recipes, and hallucination traps (deliberate tests that teach spotting and fixing errors).

Step 3: Start Where Human Review Is Native.

Pilot in functions that already require sign-off:

- Research & drafting (grounded, cited memos; template drafting with checklists);
- Forms & intake automation (screeners, structured data capture, plain-language rewrites);
- Back-office ops (AP/AR reconciliation, grant narrative synthesis, board reports);
- Knowledge management (summarize, tag, and surface internal know-how).

Step 4: Measure What Matters.

Before launch, define baselines and success metrics: hours saved, cycle-time reduction, error rates, staff satisfaction, and percent of outputs accepted on first review. For equity, track who benefits (by geography, language, practice area) and who is left out (digital access, disability accommodations).

Step 5: Prepare the Data.

AI's value rises with clean, governed knowledge. Inventory internal assets (templates, memos, trainings, pleadings), tag and normalize them, set retention rules, and establish use rights. This is the fuel for reliable grounding—and the foundation for future, higher-stakes applications.

Step 6: Expand Carefully to Client-Facing Aids.

Only after Steps 1–5 are stable should organizations explore client-facing tools for narrow, high-volume, high-burden tasks (e.g., status updates, deadline reminders, plain-language explainer drafts). Design these with clear disclaimers, escalation to humans, equity reviews, multilingual access, and offline alternatives to prevent widening the digital divide.

Risks to Manage, Not Ignore

The record is candid about risks—and how to handle them:

Accuracy & Hallucinations: Treat AI as a drafting and synthesis assistant, not a final authority. Ground to vetted sources, require citations, and verify before filing or sending. Build simple red-flag prompts (“List assumptions; what would change the conclusion?”).

Data Privacy & Confidentiality: Default to zero-retention enterprise models. Prohibit entry of client identifiers into public tools. Log usage. Redact before external calls. Coordinate with counsel on privilege and work product implications for prompts, outputs, and logs.

Digital Divide: Do not make AI the only way to get help. Pair tools with hotlines, clinics, paper forms, and in-person support. Budget for devices, language access, and assistive tech.

Regulatory Uncertainty (UPL & Liability): Keep early deployments in lawyer-supervised domains. Where direct-to-consumer tools are considered, segment legal information from legal

advice, use risk-based disclosures, and design warm hand-offs to human advocates for judgment calls.

Funding Dynamics: Resist “do more with less staff” narratives. Use metrics to show that AI reduces drudgery, improves quality, and expands reach—but does not replace the human relationships at the heart of justice.

What This Adds Up To: A Pragmatic Path Forward

Synthesizing the survey and testimony yields a clear, shared strategy:

- Acknowledge the moment: Staff want to learn, organizations are open, and the gap is urgent.
- Make safety tangible: Policies, private models, grounding, audit trails, and required human review.
- Teach by doing: Micro-modules tied to daily work, backed by job aids and checklists.
- Prove value early: Back-office and lawyer-assist pilots with clear baselines and short review cycles.
- Invest in knowledge: Clean, tag, and govern internal content now; it is the fuel for future gains.
- Advance equity by design: Multilingual support, offline options, accessibility, and impact measures that surface who benefits.
- Sequence client-facing tools: Only after governance and evaluation are working—and only for narrow tasks with human escalation.

If we follow this path, AI will not erode our mission; it will amplify it. It will free advocates to practice at the top of their license, reduce burnout, and extend help to people who would otherwise get none. It will help courts manage caseloads more fairly and transparently. And it will give communities clearer information, in plain language, at the moments they need it.

The approach recommended in this report is consistent with, and reinforced by, the New York State Unified Court System’s Interim Policy on the Use of Artificial Intelligence, which adopts many of the same core principles. Like the framework proposed here, the courts’ policy emphasizes AI as a supportive tool rather than a substitute for human judgment.

It requires mandatory training, restricts use to approved platforms, prohibits the entry of confidential or case-related information into public AI systems, and mandates human review of all AI-generated work product. The courts have similarly embraced a risk-based, phased approach that prioritizes internal staff uses before higher-risk applications and grounds AI adoption in existing ethical obligations related to confidentiality, bias, and accountability. Taken together, the court system’s policy demonstrates that the guardrails and governance structures recommended in this report reflect an emerging consensus on how AI can be responsibly integrated into the legal ecosystem while safeguarding public trust and access to justice.

AI will not replace lawyers. But lawyers and legal services organizations that learn to harness AI responsibly will out-serve those that do not.

The choice is ours: let the technology happen to us, or shape it. Open-eyed, ethically, and in service of equal justice.

Appendix A – Survey Questions and Presentation

Survey Questions Sent to New York State Participants

1. How familiar are you with AI technology and tools?

- Not at all
- Slightly
- Moderately
- Very
- Extremely

2. To what extent are AI technology and tools integrated in your work?

- Not at all
- Slightly
- Moderately
- Very
- Extremely

3. How do you use AI technology and tools in your work? (Select all that apply)

- Administrative tasks
- Brainstorming/ideation
- Case management
- Client self-help
- Community engagement
- Computer programming
- Data analysis
- Document summarization/analysis
- Forms automation
- Grants/fundraising
- Image/video generation
- Litigation support
- Research
- Training
- Translation
- Triage and intake
- Writing and editing
- I don't use AI in my work
- Other

4. What areas of your work do you believe could benefit from AI tools? (Select all that apply)

- Administrative tasks
- Brainstorming/ideation
- Case management
- Client self-help
- Community engagement
- Computer programming
- Data analysis
- Document summarization/analysis
- Forms automation
- Grants/fundraising

- Image/video generation
- Litigation support
- Research
- Training
- Translation
- Triage and intake
- Writing and editing
- I do not think AI can help with my work
- Other

5. Which Generative AI platforms and tools have you used? (Select all that apply)

- ChatGPT
- Claude
- Google Bard/Gemini
- LLaMA
- Microsoft Copilot/Bing Chat
- DeepSeek
- Lexis+AI
- Westlaw Precision/CasetextCoCounsel
- I am not sure
- I have not used any Generative AI tools
- Other

6. What are your concerns about using AI tools in your work? (Select your top 3)

- Bias
- Confidentiality
- Cost
- Data privacy and security
- Ethical implications
- Hallucinations
- Inability to explain how AI works
- Inaccurate results
- Lack of guidance and support
- Lack of knowledge and skills
- No time to learn how to use new tools
- Resistance to change
- No concerns
- Other

7. What type of support would you find valuable? (Select all that apply)

- Community AI discussion group/listserv
- In person or virtual training programs
- Interactive peer learning groups
- Online training and information library
- Sample policies and protocols
- Weekly Zoom office hours
- Other

8. Which training topics would be most valuable? (Select all that apply)

- AI basics
- Best practices for selecting and implementing AI

Artificial Intelligence and Access to Justice in 2025

- Data privacy and security
- Ethical implications of AI
- Hands-on training for specific AI tools
- Prompt creation
- Other

9. How motivated are you to use AI tools in your work?

- Not at all
- Slightly
- Moderately
- Very
- Extremely

10. How open do you think your organization is to exploring and using AI tools?

- Not at all
- Slightly
- Moderately
- Very
- Extremely

11. What is your primary role? (Select the closest match)

- Organizational Leadership (CEO, Executive Director, Director of Legal Aid Program at Larger Institution)
- Organizational Management (Deputy/Associate Director, COO, CIO, Managing Director, Program Director, Other Director)
- Legal Management (Legal Director, Practice Group Director, Managing/Supervisory Attorney)
- Attorney (Senior Staff Attorney, Staff Attorney)
- Other Legal Professional (Paralegal, DOJ Accredited Representative, Legal Advocate, Community Navigator)
- Administrative/Operational/Compliance
- IT/Technology Worker
- Pro Bono Provider/Private Practice
- Other

12. If your organization/firm/company has developed/collected trainings and policies, would you be willing to share these materials?

- Yes
- No

13. Name (optional)

14. Email (optional)

15. Organization (optional)

Power Point Presentation of New York State Data Set

(Below is intentionally blank)

Artificial Intelligence and Access to Justice in 2025

NYS Legal Services Community Perspectives on AI: Survey Results & Insights

New York State Bar Association - Presidents Committee on Access to Justice
July 16, 2025

1

Special Thanks to Lisa Colpoys

We deeply appreciate Lisa Colpoys who is a Senior Consultant, AI Initiative Lawyers Trust Fund of Illinois, for her exceptional support in preparing this survey and presentation, which include:

- Sample survey questions
- Illinois survey results
- Sample documents and resources

Lisa’s guidance was instrumental in shaping our approach. We utilized her PowerPoint format with some changes, and notably, much of our data aligned closely with the survey she conducted.

This initiative would not have been possible without her expertise and generosity.






2

Overview

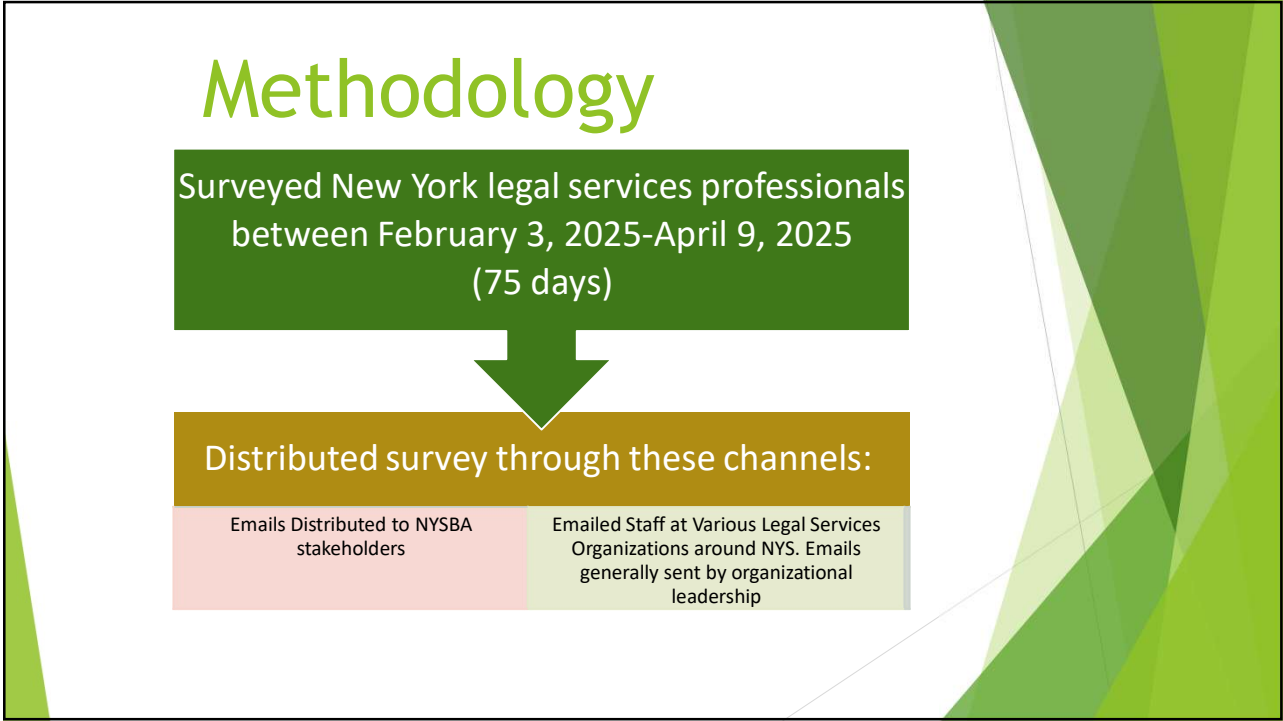
- AI Survey Objectives
- Methodology
- Key Findings
- Recommendations and Next Steps

3

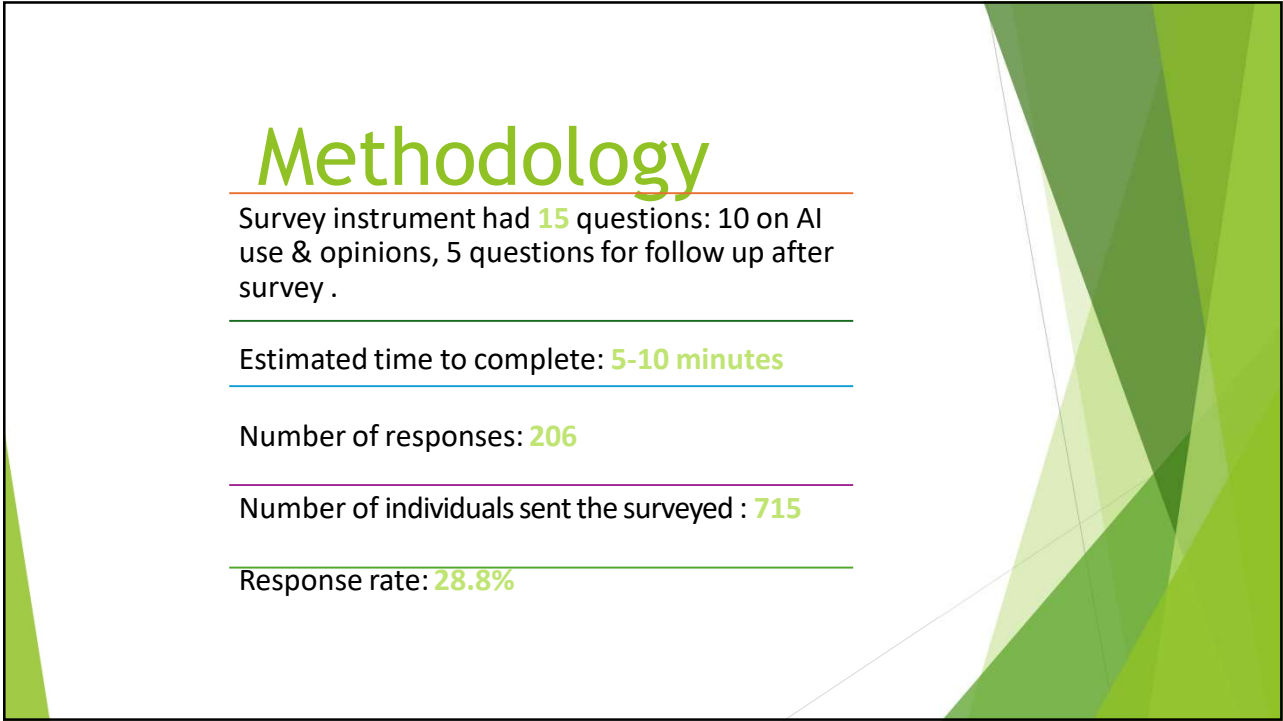
Legal Services Community Survey Objectives

-  Uncover, understand current awareness & adoption of AI
-  Identify concerns and potential challenges
-  Determine training and support needs
-  Gauge level of motivation to use AI
-  Collect baseline data

4



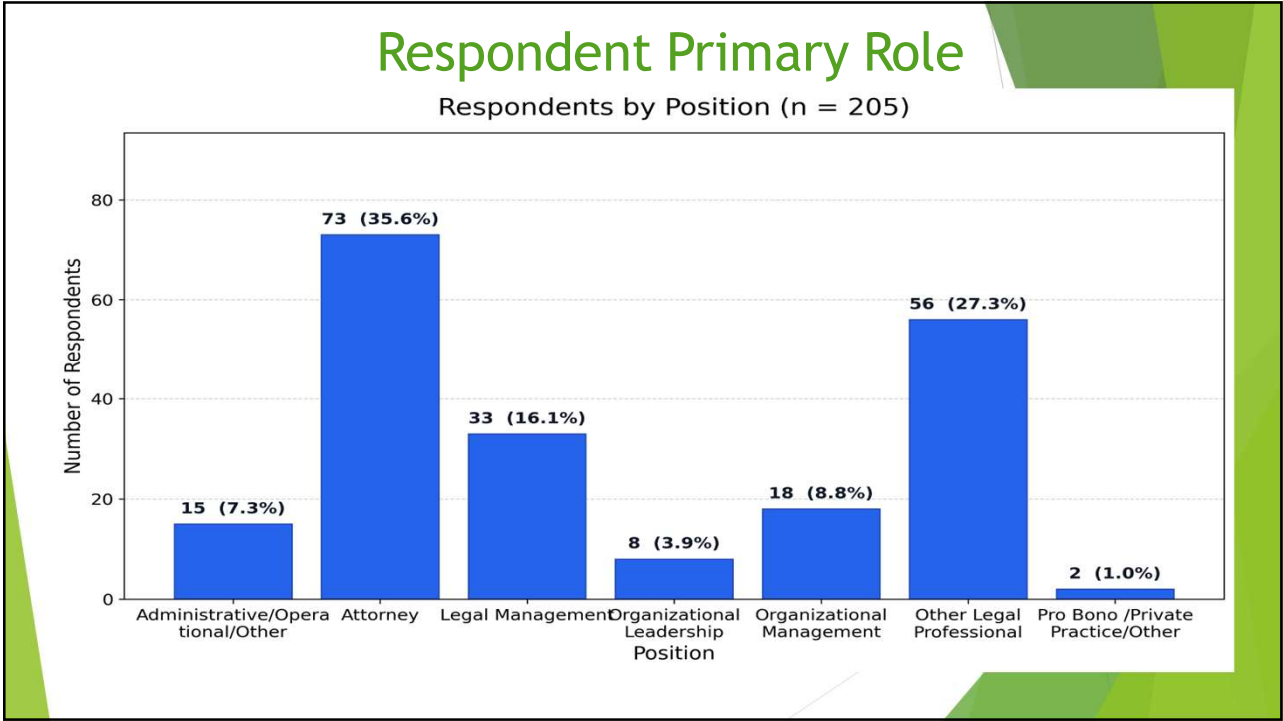
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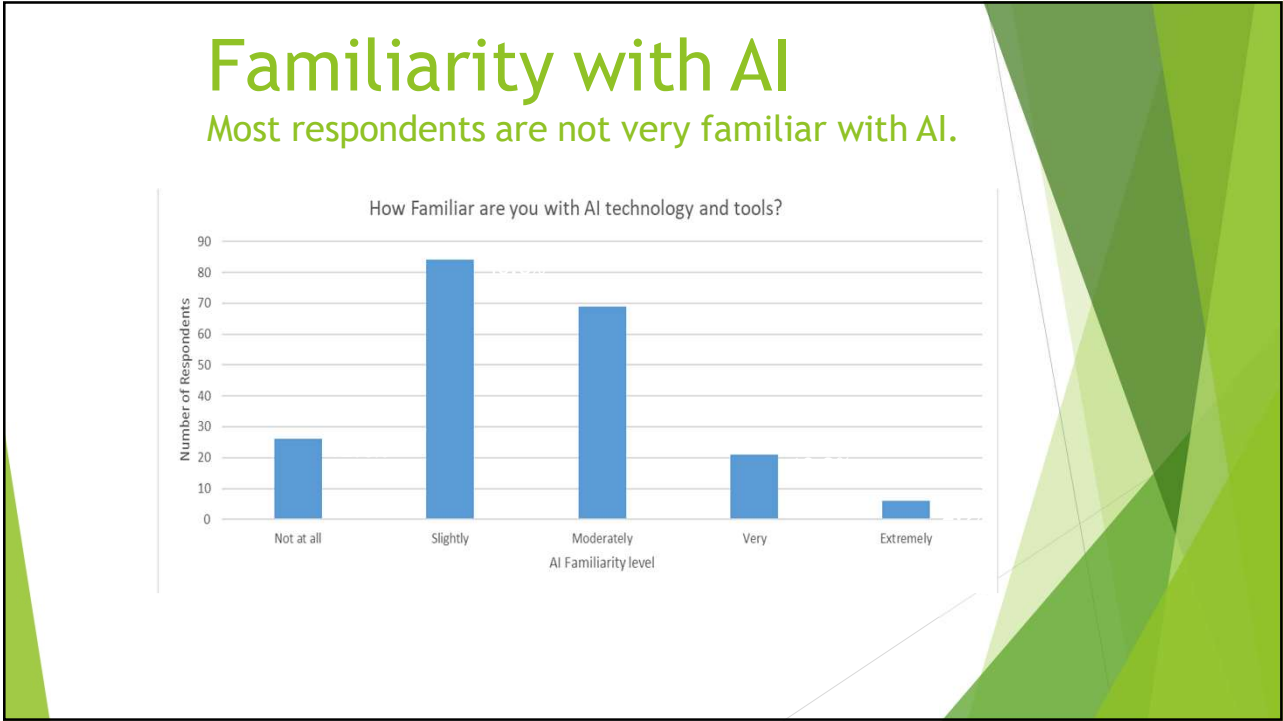
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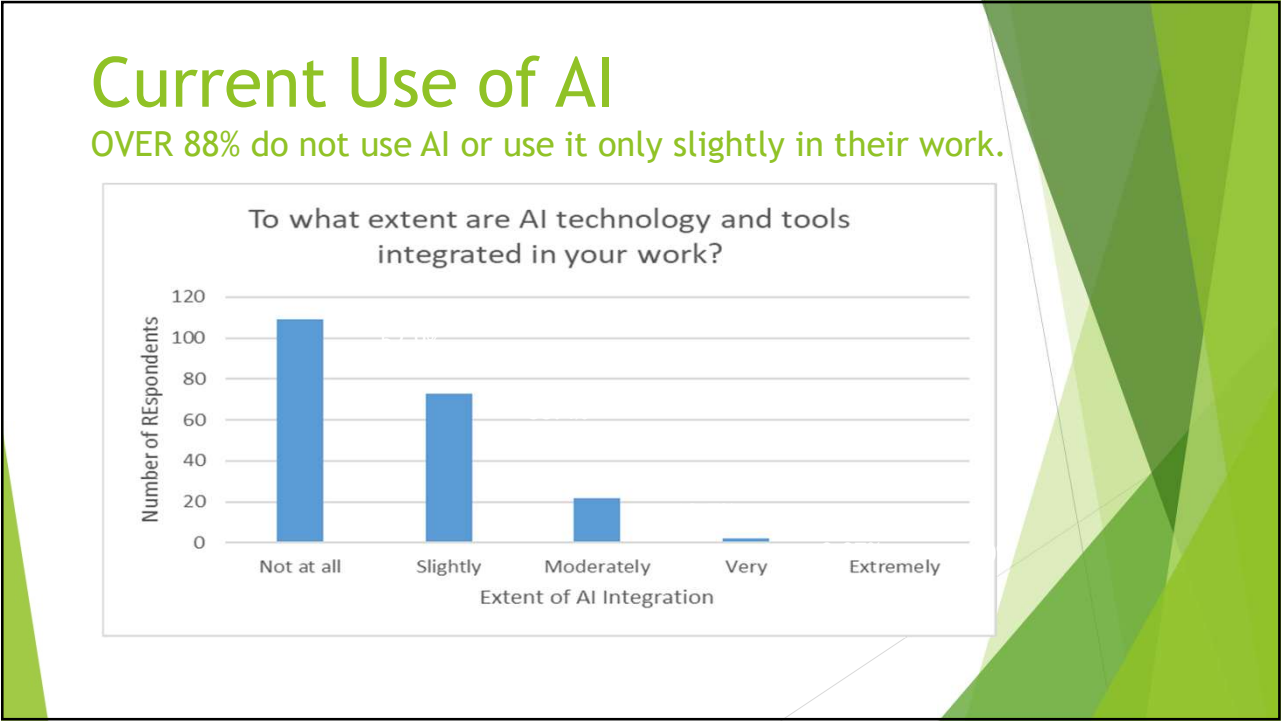
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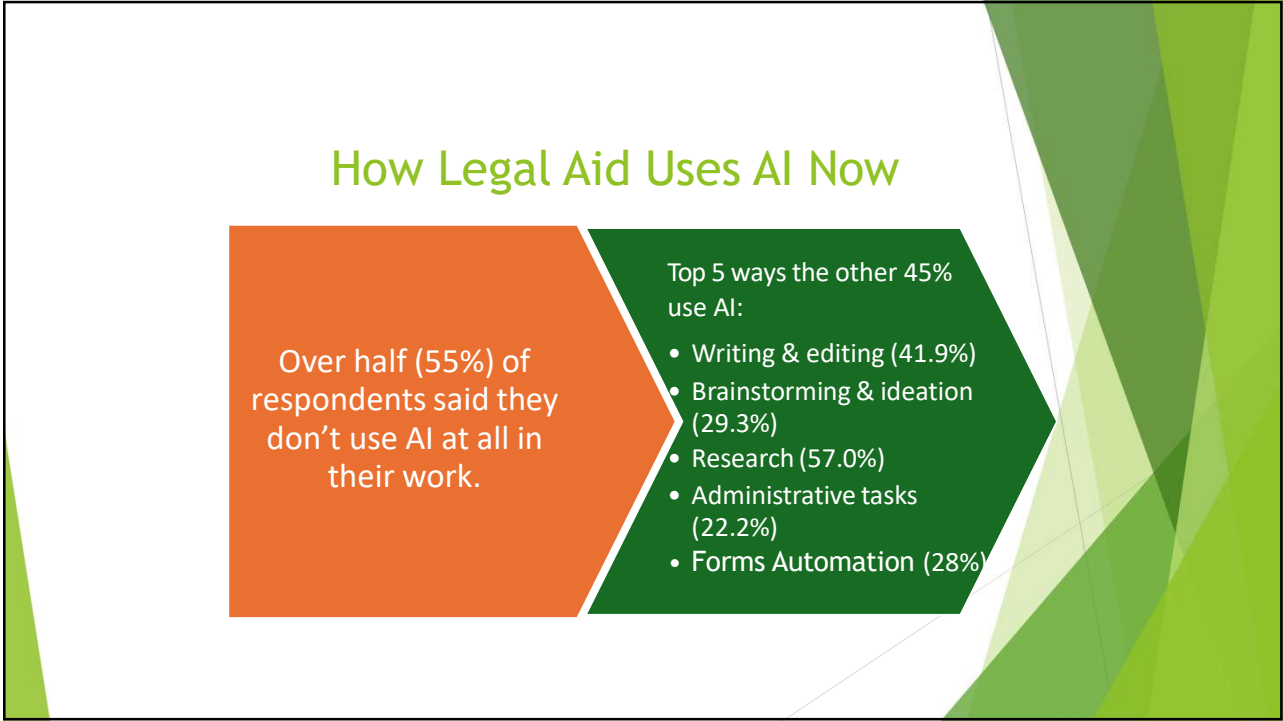


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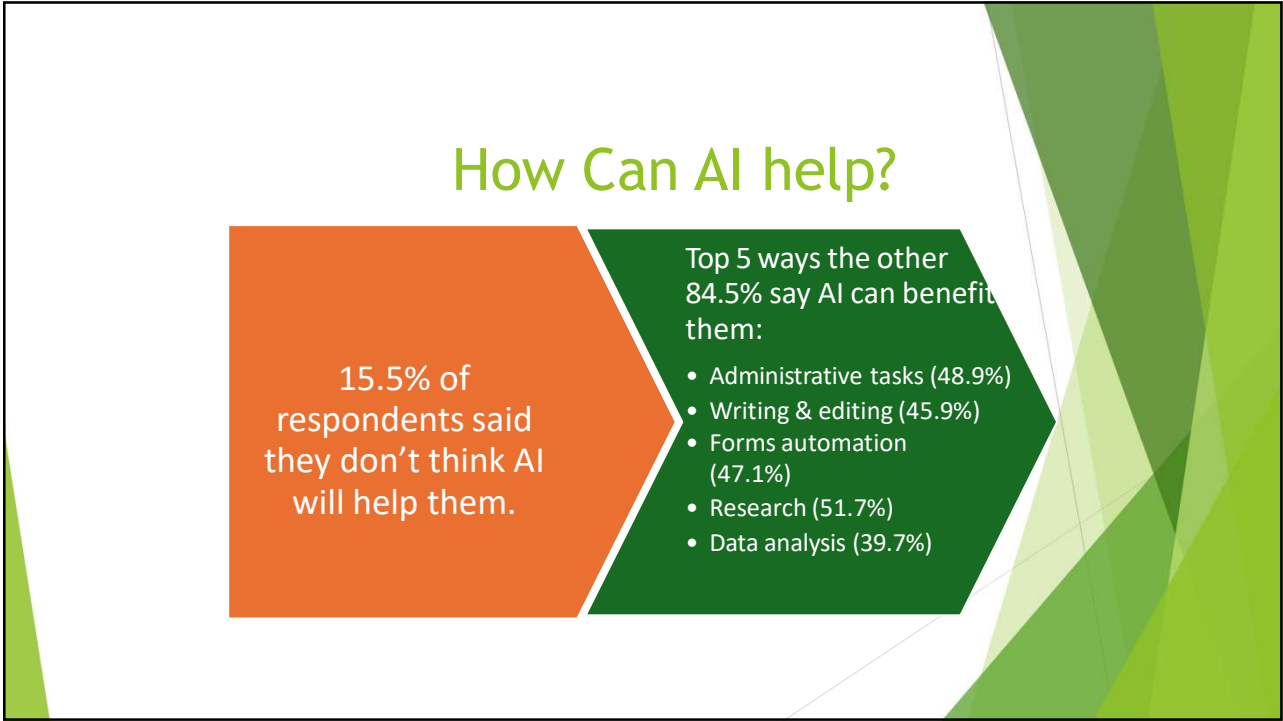
Insights: Current Use of AI

- Low integration of AI suggests potential **barriers to adoption** such as lack of familiarity, ethical concerns, or resource constraints.
- **Leadership may be exploring AI** but not yet pushing for broad organizational adoption.
- The numbers indicate that AI tools are still **more of a concept than a daily tool** for most legal aid professionals.

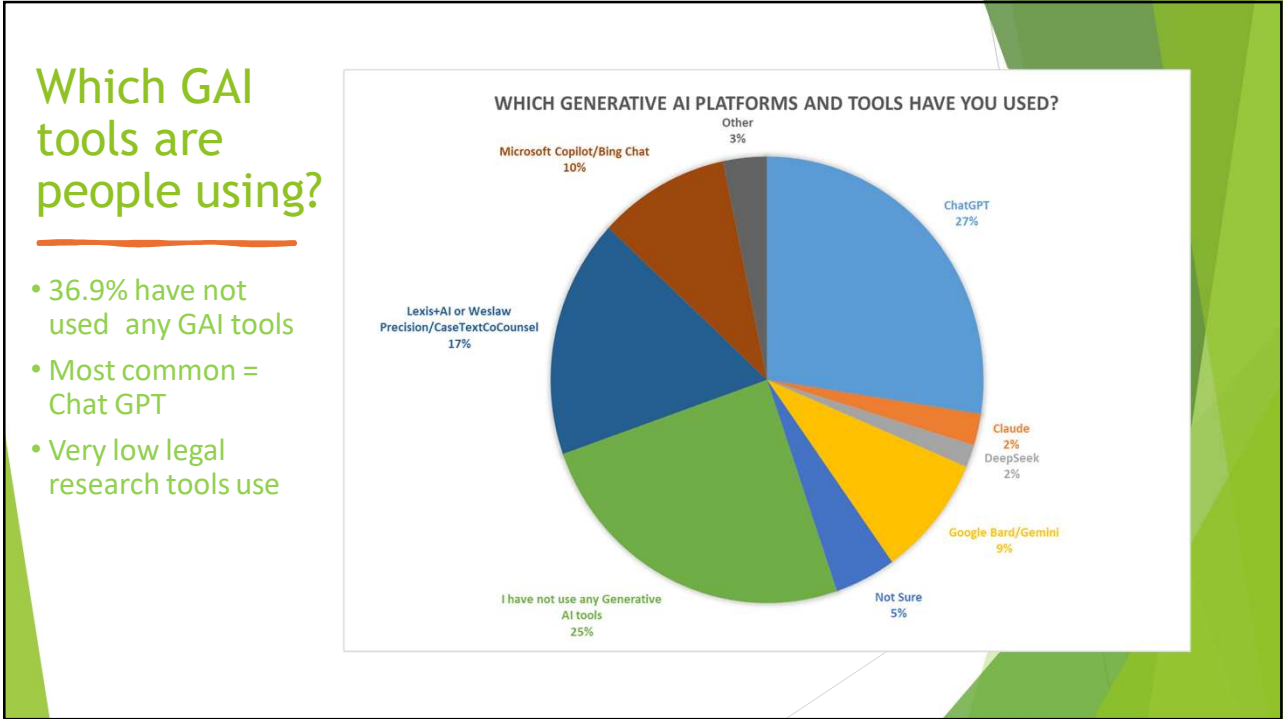
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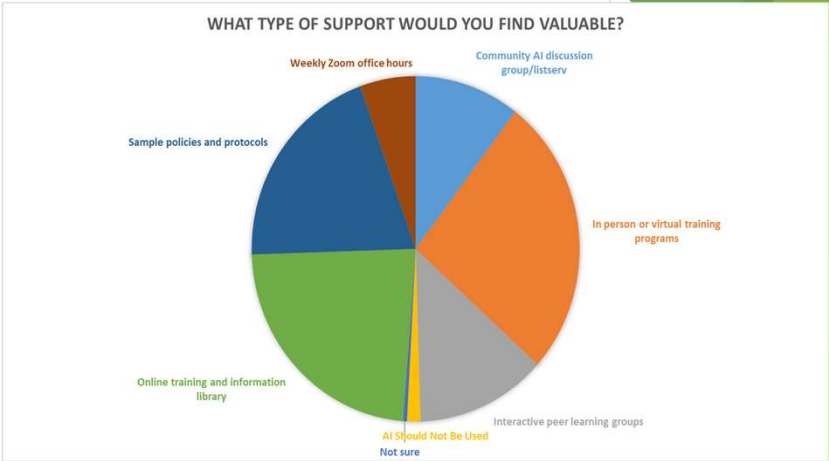
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Support Needs

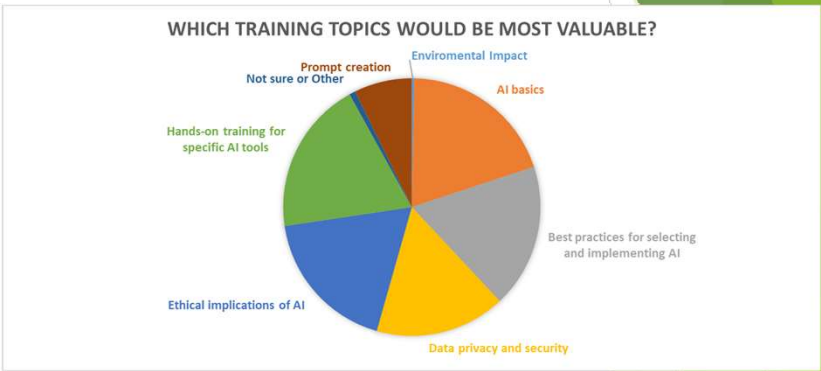
- 66% of respondents want training
- At this time, passive methods of support are preferred over interactive support



17

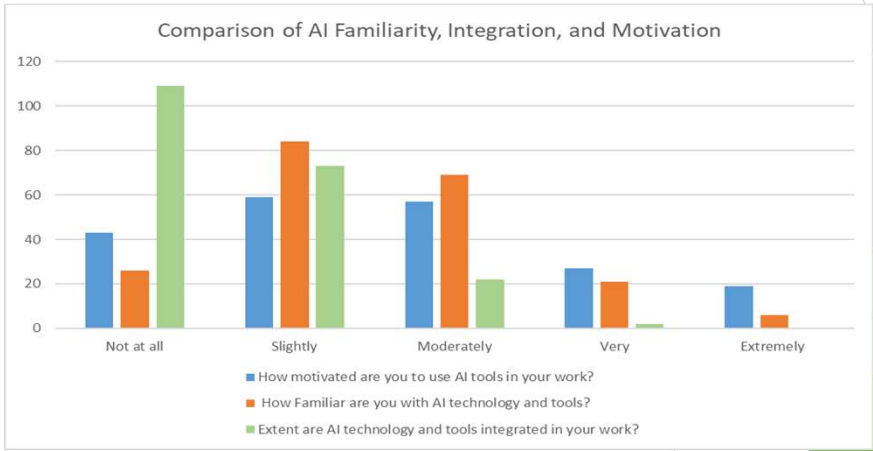
Training Topics

Top training requests = AI basics, ethics, & hands-on AI tool training (61% each)



18

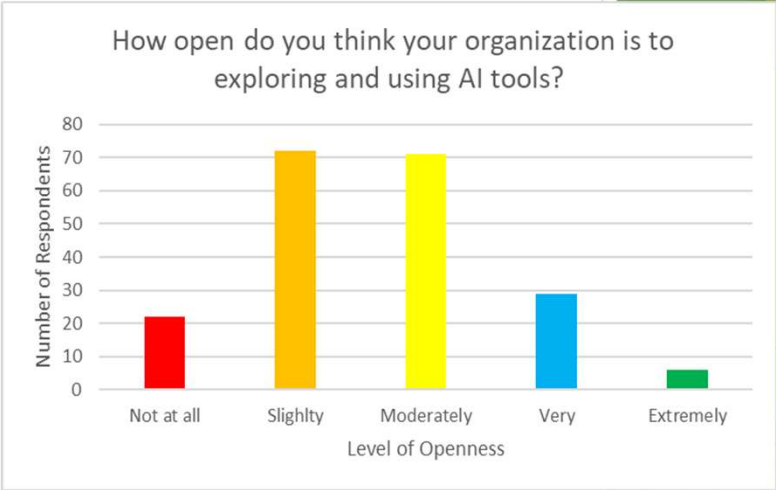
Personal Motivation higher than Familiarity, Current Use



19

Perception of Organization Openness to AI

Nearly 2/3 think their employer is moderately or more open to using AI.



20

Summary of Key Findings

Personal motivation to adopt AI is stronger than current levels of familiarity and usage.

Many remain cautious, as concerns around accuracy, ethics, and privacy continue to pose barriers to adoption.

Training is the top priority - legal aid professionals are seeking guidance on AI fundamentals, practical resources, and sample policies

Initial interest in AI is focused on **efficiency**, not direct services.

21

Recommendations & Next Steps



Develop foundational AI training, resource library, and peer learning opportunities for interested professionals.



Foster discussions on use cases, policies, ethics, and other important AI topics.



Develop vendor engagement guidance and checklist.



Strategize about how to address major concerns and challenges.

22



Appendix B – Hearing Information

Virtual Hearing: Artificial Intelligence and Access to Justice in 2025

Date: May 21, 2025

Time: 2 PM to 4 PM

Platform: Zoom (Virtual)

Hosted by: New York State Bar Association: President's Committee on Access to Justice

Description: Join us for an insightful virtual hearing hosted by the New York State Bar Association's, President's Committee on Access to Justice, focusing on the transformative impact of Artificial Intelligence (AI) on access to justice for indigent clients in New York and around the country. As AI continues to evolve, it presents both opportunities and challenges for the legal profession. This hearing will explore how AI can enhance the delivery of legal services, improve efficiency, and expand access to justice, while also addressing the ethical and privacy concerns associated with its use.

Key Topics:

- The role of AI in legal research and case management
- Ensuring AI does not compromise attorney-client privilege
- The potential of AI to predict legal outcomes and streamline processes
- Ethical considerations and governance of AI in the legal field
- Legislative and regulatory approaches to AI in law

Who Should Attend:

- Legal professionals
- Law students
- Policy makers
- Technology experts
- Anyone interested in the intersection of AI and law

Registration: Please register [[here](#)] to secure your spot for this important discussion.

Panelist

Sam Harden: Senior Innovation Manager

Sam is a lawyer, technologist, and a believer that technology can help bridge the access-to-justice gap. He likes to get his hands dirty and is constantly building and experimenting with ways to

apply technology to law. He is frequent speaker about the intersection of law and technology. Sam previously worked as the Development Team Leader for the Florida Justice Technology Center as well as the Project Manager for the Florida Criminal Justice Data Pilot Project with Measures for Justice. He is licensed in Florida, where he previously practiced large loss litigation and criminal defense.

Sateesh Nori: Senior Legal Innovative Strategist

Sateesh Nori is a lawyer, law professor, and author. He is a Senior Legal Innovation Strategist at Just-Tech. For twenty years, he represented tenants across New York City at various legal services organizations. He was a commissioner of the 2019 Charter Revision Commission. He is currently a member of the ABA Commission on Homelessness and Poverty. He co-created and co-teaches the Housing Rights Clinic at NYU Law. Sateesh is a graduate of Johns Hopkins University and NYU Law. Sateesh was named a “Rising Star” by the New York Law Journal, one of “Queens’ Power 50,” and was featured as a “Legal Rebel” in the Spring 2021 ABA Journal. In 2023, he was a recipient of the New York City Bar Association’s “Legal Services Award.” He is also the author of “Sheltered: Twenty Years in Housing Court.” In 2024, he gave a TedX Talk called “How a chatbot can stop homelessness.”

Ronald J. Hedges: Principal of Ronald J. Hedges LLC

Ronald J. Hedges is the Principal of Ronald J. Hedges LLC. He served as a United States Magistrate Judge in the District of New Jersey for over 20 years. He speaks and writes on a variety of topics, many of which are related to electronic information, including procedural and substantive criminal law, information governance, litigation management, and the integration of new technologies such as artificial intelligence into existing information governance policies and procedures. He was a member of the artificial intelligence (“AI”) task forces of the New Jersey and New York state bar associations and is now a member of the permanent AI committees of both Bars. Ron is also a member of the Founders Circle of the Georgetown Law Advanced eDiscovery Institute.

- Ron is the lead author of a guide for federal judges on electronically stored information, <https://www.fjc.gov/content/323370/managing-discovery-electronic-information-third-edition-2017>.
- Ron is also the co-senior editor of The Sedona Conference Cooperation Proclamation, Resources for the Judiciary, Third Edition (June 2020) and the 2022 supplement thereto, <https://thesedonaconference.org/sites/default/files/Judicial%20Resources%20publication%20announcement.pdf>
- He is also the editor of various compendiums on electronic information in criminal investigations and proceedings hosted by the Massachusetts Attorney General’s Office, <https://www.mass.gov/service-details/understanding-electronic-information-in-criminal-investigations-and-actions>

Scott B. Reents: Of Counsel Cravath, Swaine & Moore LLP

Scott is a litigator who focuses on electronic discovery and the application of artificial intelligence (AI) and other advanced technologies to legal practice. Scott represents clients in a variety of litigation matters, regulatory matters and internal investigations. He oversees the Firm’s data analytics and e-discovery work and speaks and writes about topics related to digital evidence and

AI. Scott is co-chair of the New York State Court Modernization Action Committee and is a member of the New York Advisory Committee on AI and the Courts. Scott worked in the technology industry for 8 year prior to becoming a lawyer.

Aubrie Souza: Principal Court Management Consultant, National Center for State Courts

Aubrie Souza is a Court Management Consultant at the National Center for State Courts (NCSC). She works on a variety of projects related to court access through technology. She received her JD from Suffolk University Law School. Prior to joining NCSC, Aubrie held numerous roles at the law school's Legal Innovation and Technology Lab to develop guided online interviews to assist self-represented litigants in creation of narrative pleadings and filings. She also served as a student defense attorney in the Suffolk Juvenile Defenders Clinic representing juveniles in the Boston Juvenile Court in delinquency cases. Aubrie currently lives in Boston, Massachusetts.

Zachary Zarnow: Deputy Managing Director of the Access to Justice Team, National Center for State Courts

Zach Zarnow has focused his career on increasing access to justice. After graduating from Brandeis University, Zach spent two years in Eastern Ukraine as a Peace Corps Community Development Volunteer, where he developed civil society networks, established social enterprises and created anti-corruption initiatives. This experience drove him to enroll at American University's Washington College of Law, where he focused his studies on access to justice, human rights and legal empowerment. Both during and after law school he held fellowships and positions with the American Bar Association's Rule of Law Initiative, the Open Society Foundations, Public Justice, the American Association for Justice and the Council for Court Excellence.

As the Deputy Managing Director of NCSC's Access to Justice team, Zach is working on national level initiatives to increase access to justice, including working with various court systems to improve the experience of self-represented litigants through process improvement, technological innovation and system change. At NCSC, Zach is the co-creator and a co-host of Tiny Chats—offering free, digestible and creative short-form educational videos on topics about access to justice. He was also instrumental in securing \$11 million in funding to support the Eviction Diversion Initiative and in its design, staffs the CCJ/COSCA Policy Committee and has authored numerous reports and resources on access to justice topics, including several interactive tools.

Prior to joining NCSC, Zach was the Program Director at the Illinois Equal Justice Foundation, where he ran the statewide grantmaking and program evaluation of legal aid organizations and was responsible for the development and management of the Illinois Armed Forces Legal Aid Network.

Jeffrey Cox: Director of Global Content Marketing at vLex, Chair of Board of Directors, Bay Area Legal Services in Florida

Jeff Cox is the Chairperson of the Board of Directors of Bay Area Legal Services, and has served on the Board since February 2020 in several capacities, including as Chairperson Elect, Board Secretary, Chair of the Veterans Committee, Chair of the Audit and Finance Committee, and as member of the Sustaining Law Firm and Stewardship Committees. Jeff is also the Director of Global Content Marketing for vLex, a global legal intelligence pioneer transforming how lawyers work through precision-engineered AI solutions, and previously served as Senior Manager of Content Strategy at Orrick, Herrington & Sutcliffe LLP. As an innovative lawyer, content strategist,

and legal technologist, Jeff specializes in helping legal technology companies and law firms elevate their corporate and professional narratives, develop thought leadership campaigns, and enhance digitally delivered content centered on the use of technology, data, and AI to improve legal services delivery and the business of law.

Lisa Colpoys: Senior Consultant, AI Initiative, Lawyers Trust Fund of Illinois

Lisa Colpoys is an experienced public service leader and innovator who has spent her career working to create and deliver new ways for people to solve their legal problems. She is passionate about transforming our courts and the practice of law through innovative ideas and the use of technology, and improving and simplifying processes and systems. Currently she serves as Senior Consultant to the Lawyers Trust Fund of Illinois' AI Initiative, where she works to introduce and encourage the exploration and use of Generative AI by legal aid organizations and professionals. Highlights of her career include launching and leading both Illinois Legal Aid Online, a groundbreaking legal services technology nonprofit, and Illinois Court Help, a tech-enabled service of the Illinois Courts that helps people navigate complex court processes. Lisa also led the Filing Fairness Project at Stanford Law School, served as consultant to the Michigan Justice for All Project, and was a legal aid attorney. LinkedIn: [linkedin.com/in/lcolpoys/](https://www.linkedin.com/in/lcolpoys/)

Randal Jeffrey: General Counsel, New York Legal Assistance Group

Randal has worked at NYLAG for over 25 years, first as a staff attorney in the Special Litigation Unit, then as a Unit Director, and now as General Counsel. As General Counsel, he advises NYLAG's senior management on a wide range of issues and coordinates with outside counsel on select matters. Randal also serves as an in-house resource for all staff on matters of professional legal ethics and works with NYLAG's Board on matters of nonprofit governance. He also coordinates NYLAG's Generative AI Working Group. Prior to coming to NYLAG, Randal worked as a pro se law clerk with the Second Circuit's Staff Attorney's Office and was a Georgetown Fellow at the Legal Aid Society of the District of Columbia.

Alexander Horowitz: Chief Operating Officer, Legal Services NYC

Appendix C - Submitted Written Testimony

Written testimony was submitted by the following panelists:

- **Ronald J. Hedges** – Principal, Ronald J. Hedges LLC
- **Aubrie Souza** – Principal Court Management Consultant, National Center for State Courts
- **Zachary Zarnow** – Deputy Managing Director, Access to Justice Team, NCSC
- **Jeffrey Cox** – Director of Global Content Marketing, vLex; Chairperson, Bay Area Legal Services
- **Sateesh Nori** – Senior Legal Innovation Strategist, Just-Tech
- **Randal Jeffrey** – General Counsel, New York Legal Assistance Group
- **Lisa Colpoys** – Senior Consultant, AI Initiative, Lawyers Trust Fund of Illinois
- **Sam Harden** – Senior Innovation Manager, Pro Bono Net

Testimony Highlights and Overview

Hon. Ron Hedges (Ret.)

Role: Former U.S. Magistrate Judge

Opportunities:

- AI can enable form-based intake and assist attorneys.
- Drafting, research, contract review, risk assessment, chatbots, plain-language conversion.

Risks:

- Digital divide.
- Hallucinations in legal research.
- Need for technical assistance and cost implications.
- UPL concerns.

Governance:

- Clear definitions of AI types.
- Discussion-based approach to boundaries.

Deployment Strategies:

- Start with low-risk tasks.
- Explore chatbots and plain-language tools cautiously.
- Maintain human review.

Scott Reents

Role: Lawyer in private practice; member of NY court committees (Court Modernization Action Committee; Committee on AI and the Courts)

Opportunities:

- **Cost reduction & capacity:** AI can **lower the cost of legal services**, making lawyers **2–3× more effective**, enabling service to more clients and narrowing the justice gap.
- **Three domains framework:** Think about AI for **(1) litigants**, **(2) lawyers**, and **(3) courts**—each with distinct levers for improving access to justice.
- **Talent complementarity:** AI is a **force multiplier for experienced lawyers**, accelerating research and drafting to improve reach and value.

Risks:

- **Downstream effects:** Faster filings and drafting could **increase volume** before courts—risking an “arms race” between submissions and adjudicative capacity; **speed** may harm litigants in some contexts (e.g., **housing** cases where time can benefit tenants).
- **Reliability:** Hallucinations and data-quality concerns persist, requiring caution and oversight.

Governance

- **Responsible-use training:** Before tool access, lawyers complete **training on how AI works, its limits, and do-not-use cases**, to avoid ethical or legal pitfalls.

Deployment Strategies

- **Get AI into lawyers’ hands now** to climb the learning curve—even if immediate productivity gains are modest—so organizations are ready as capabilities mature.
- **Tool-specific + responsible-use trainings** as dual tracks for adoption.

Aubrie Souza & Zachary Zarnow

Role: Senior Court Management Consultant & Deputy Managing Director, Access to Justice Team, National Center for State Courts

Opportunities:

- User-centered innovation: AI prompts modernization and creative approaches to service delivery.
- Plain-language assistance: AI can simplify complex legal language for self-represented litigants.
- Court support: AI chatbots and guided interviews can help with document preparation and triage.
- Efficiency gains: AI can free staff for high-impact work and assist with content management.

Risks

- Hallucinations: AI outputs may appear authoritative but lack factual grounding.
- Public trust: Incorrect AI guidance can harm court users and erode confidence.
- Techno-hype cycle: Vendors overstate capabilities; courts must insist on independent testing.
- Digital divide: Reliance on AI risks worsening disparities for those without internet access.
- Privacy & sustainability: Data-sharing practices and long-term costs pose challenges.

Governance

- Calls for independent evaluation of AI tools for accuracy, reliability, and fairness.
- Emphasizes procurement vigilance regarding terms of service and data privacy.
- Advocates for human-in-the-loop oversight in all public-facing applications.

Deployment Strategies

- Start with internal court operations and staff-facing tools for low-risk experimentation.
- Use AI for plain-language rewrites, administrative workflows, and rapid prototyping.
- Apply AI to content management to maintain consistency and navigability.

Jeff Cox

Role: Director of Global Content Marketing, vLex; Board Chair, Bay Area Legal Services

Opportunities:

- Scaling solutions: Generative AI can dramatically expand capacity for legal aid organizations, enabling faster, more personalized service.
- Efficiency gains: Tasks like contract analysis, complaint review, and client communication can be completed in minutes instead of hours.
- Personalization: AI can tailor user experiences and combine case facts with legal arguments for better outcomes.
- Data governance: Legal aid organizations can leverage existing document repositories and case data to train specialized models and improve workflows.
- Operational benefits: AI can assist with fundraising, social content, and administrative tasks, improving lawyer satisfaction and retention.

Risks

- Equity concerns: Cost barriers may limit legal aid access to advanced AI tools, creating a two-tiered justice system.
- Policy gaps: Many organizations lack comprehensive generative AI policies addressing privacy, confidentiality, and ethical use.
- Data misuse: Risk of client data being used to train models without safeguards.
- UPL debates: Overemphasis on unauthorized practice rules while millions already seek legal info online.

Governance

- Advocates for zero data retention agreements with AI providers.
- Calls for clear frameworks on data privacy, confidentiality, and ethical considerations.
- Emphasizes responsible AI use with vendor accountability and transparency.

Deployment Strategies

- Use AI for intake triage, real-time call center support, and eligibility analysis.
- Implement data governance frameworks for organizing and tagging organizational assets.
- Apply AI to non-legal tasks (fundraising, communications) to free attorney time.

Sateesh Nori

Role: Senior Legal Innovation Strategist, Just Tech LLC

Opportunities:

- AI as a force multiplier: Addresses the justice gap by enabling one lawyer to do the work of five; automates repetitive tasks like drafting pleadings, summarizing case law, and intake triage.
- Equity through affordability: AI tools are increasingly low-cost and open-source, making them accessible to nonprofit legal aid groups.
- Direct-to-consumer empowerment: Advocates for public-facing AI tools with safeguards to help individuals solve legal problems without waiting for a lawyer.
- Legal education reform: Calls for AI literacy as a core component of law school curricula—integrated into doctrinal courses, clinics, and bar prep.

Risks

- UPL restrictions: Current unauthorized practice of law rules block innovation and perpetuate inequity.
- Quality control: AI must be grounded in accurate, up-to-date legal data and include disclaimers.
- Systemic inertia: Resistance to change in legal culture could delay adoption and worsen the justice gap.

Governance

- Proposes a risk-based, evidence-informed framework for AI regulation focused on outcomes, not professional guild rules.
- Emphasizes ethical safeguards and transparency for consumer-facing tools.
- Advocates for vendor accountability and independent testing.

Deployment Strategies

- Start with staff-facing tools for drafting and research, then expand to consumer-facing solutions with disclaimers and human fallback.
- Reform UPL laws or create regulatory sandboxes to allow innovation without harming consumers.

- Integrate AI training into law schools to prepare future lawyers for responsible use.

Randal Jeffrey

Role: General Counsel, NYLAG

Opportunities:

- GenAI can transform access to justice.
- Internal uses: research, drafting, summarization.
- External uses: intake, explaining case status, client communication.

Risks:

- Ethical and privacy concerns.
- Hallucinations and quality control.
- UPL risk for freestanding GenAI.

Governance:

- Intentional community-wide discussion.
- RAG-based systems for accuracy.
- Client-centered approach.

Deployment Strategies:

- Internal assistant, external assistant, freestanding agent.
- Phased adoption with human oversight.

Lisa Colpoys

Role: Senior Consultant, AI Initiative, Lawyers Trust Fund of Illinois

Opportunities:

- Expand access to justice for underserved populations.
- Reduce administrative burdens and improve efficiency.
- Illinois model demonstrates structured enablement: webinars, discussion groups, office hours, peer learning, resource libraries, micro-grants.

Risks:

- Resource disparities; legal aid may lag behind private bar.
- Negative impact on clients if AI deployed without input.
- Accuracy, ethics, privacy concerns.

Governance:

- Responsible deployment with guardrails.
- Vendor engagement guidance, ethics frameworks, policy development.

Deployment Strategies:

- Start with problem identification.
- Illinois approach: webinars, moderated discussion, office hours, cohorts, resource library, micro-grants.

Alexander Horwitz

Role: Chief Operating Officer, Legal Services NYC

Opportunities:

- Back-office efficiency gains: LSNYC is using a private LLM with hidden prompts and semantic search to power knowledge management—rapidly digesting large documents, generating summaries, and distributing them org-wide.
- Operational automations: AI supporting AR/AP in Finance, reducing overtime and overhead on complex accounting; Grants & Contracts summarizing case studies for funder reporting; Data & Evaluation analyzing large datasets for grant reporting, internal diagnostics, and affirmative litigation (e.g., poverty distribution and geo-legal needs overlays).
- Attorney support: Targeted, “safe” experimentation with AI for discovery in select practice areas.

Risks:

- Client-facing caution: Deliberate decision not to deploy AI in anything that touches clients directly—concerns about hallucinations, lack of explainability, and the risk of losing the nuance and care required in human-services interactions.
- Quality control limits: Example from LSNYC’s high-volume hotline ($\approx 120k$ calls/year, $\sim 60k$ answered) shows how hard it is to monitor quality and correct errors—something current AI cannot reliably do in client interactions.
- Reliability & public trust: Notes a news anecdote where an AI-powered list recommended non-existent books, underscoring broader reliability concerns for consumer-facing tools.

Governance

- “Safe integration” principle: Start where risks are low and oversight is strong (internal operations), share learnings with the legal services community/LSC grantees, and be transparent about limits.

Deployment Strategies

- Prioritize internal use cases (knowledge management, finance, grants, data analytics) that demonstrably save time and money and free advocates for mission work; continue cautious pilots for litigation support.

Sam Harden

Role: Senior Innovation Manager, Pro Bono Net

Opportunities:

- Increase attorney capacity; let lawyers work at top of license.
- AI assistants for case prep, document retrieval, scheduling.
- Self-represented litigants: personalized legal info.
- Rapid prototyping and testing of tech solutions.

Risks:

- Accountability of AI providers.
- Hallucinations; AI can be confidently wrong at scale.
- Over-regulation risk.

Governance:

- Light-touch regulation and vendor accountability.
- Security and privacy safeguards.

Deployment Strategies:

Artificial Intelligence and Access to Justice in 2025

- User testing with clinic participants and court users.
- Experiment with in-house AI for workflow automation.
- Agile frameworks for rapid prototyping.

Testimony of Ron Hedges

1. “What are you excited about regarding AI and access to justice?”

Before I give my answer, I must ask what “type” of AI are we talking about? If a computer simply matches patterns to pre-determined categories, is that AI? Or, if a computer uses algorithms that continuously learn such that output is refined as data volumes increase and do so without human intervention, is that AI? Or are we talking “Generative AI (GAI),” a subset of AI that uses algorithms to generate new data from existing massive data sources. The data sources primarily come from the Internet. GAI can be used to create text, images, music, and other forms of media. Examples include ChatGPT, Bard, and DALL-E-2.

So, to answer the question, I am excited that AI, depending on the “type” of AI, can make available forms that can be set up by legal aid attorneys and accessed by individuals who can fill in a relevant form and give information to the attorney.

2. “What are you worried about regarding AI and access to justice?”

My primary worry stems from the possibility by individuals who need “access” have limited or no access to the Internet to, for example, communicate with legal aid attorneys and/or fill out the forms I referred to above. Moreover, if attorneys or these individuals rely on their own research, we should be concerned about their use of online sources that generate “hallucinations” such as we have seen in case law beginning with *Mata*. All of this might lead to the need for expert “technical” assistance, which raises questions of how to secure that assistance and what costs might be. There is also the question whether one or more of the forms might be used to generate answers such that the unauthorized practice of law might be taking place.

3. “What Should We Be Using AI to Do That We Might Not Be Doing in Your View?”

- Draft documents
- Conduct legal or other research
- “Democratize” access to legal or other research
- Review contracts or other documents
- Engage in risk assessment
- Create chatbots that the public can access for advice
- “Brainstorm” about causes of action or defenses
- Summarize legal narratives
- Convert “legalize” into plain language

As I review these possible uses, red flags do pop out. So, I suggest these as a start for a discussion about what AI can do or perhaps should not do.

RJH 4/27/25

Testimony of Aubrie Souza and Zachary Zarnow

Submitted for the Virtual Hearing: Artificial Intelligence and Access to Justice in 2025

Aubrie Souza, Senior Court Management Consultant, National Center for State Courts

Zachary Zarnow, Deputy Managing Director of the Access to Justice Team, National Center for State Courts

1. What are you excited about regarding AI and access to justice?

One of the most exciting developments at the intersection of artificial intelligence and access to justice is the way AI is prompting creativity and modernization within the legal system. While the law has traditionally evolved slowly, AI has accelerated excitement about innovation, user-centered design, and systemic reform. It has invited courts and legal organizations to reconsider whether there are new ways to deliver services and for people to engage with legal systems, information, and providers.

AI tools, particularly large language models, have the potential to expand access to resources for people navigating the legal system without a lawyer. Creating resources for non-experts can be challenging. For example, legal terms can be difficult for experts to clearly translate into plain language for people without lawyers. AI tools can offer first-pass assistance in simplifying complex legal language, generating plain-language explanations.

Further, courts and legal aid organizations have begun experimenting with AI tools. AI chatbots and AI guided interviews may help create custom legal information or with document preparation assistance. These tools can offer tailored information for complex processes in a format that is accessible anytime of the day, written in clear, simplified language for people without legal expertise. At the same time, AI can serve as a valuable support tool for overburdened court staff and legal aid providers by triaging cases or assisting in the review of pleadings. When used carefully, AI can free up staff to focus on high-impact, nuanced work, potentially improving both service quality and operational efficiency.

2. What are you worried about regarding AI and access to justice?

Despite the promise of AI, there are significant concerns about its risks when deployed without thoughtful design, consistent oversight, understanding of its limitations, and rigorous study and evaluation. While the outputs of large language models may appear authoritative, these tools are fundamentally probabilistic systems not grounded in fact, but in patterns of language. The susceptibility of hallucinations or miscalculations can be dangerous if relied upon by individuals without the legal expertise to assess AI outputs. This can be particularly troubling for court users without lawyers who have no choice but to engage with the systems provided to them. Unlike expert staff, people without lawyers cannot always discern whether AI-generated information is accurate, complete, or relevant. If AI tools are not carefully evaluated for reliability, transparency, and fairness and not paired with strong human oversight we risk eroding public

trust, not to mention the potential harm that can be done to court users or the public if they are given AI tools by a court or other provider, which incorrectly leads them down an incorrect path.

We are also in the middle of a techno-hype cycle, which makes all of this much harder to manage. Actors, both scrupulous and otherwise, are inundating the public and courts with possible features, or abilities to come, or expansive claims about what these tools can do. For courts, legal aid, and lawyers, the job now is to not accept those claims at face value, but instead to look for or conduct independent testing and evaluation for accuracy, reliability, and utility. Just because a vendor claims a tool can do something doesn't mean that it can. Just because a tool can do something doesn't mean that it is actually helpful. The hype will eventually settle into reality as more and more of these tools and claims are interrogated, but we must remain clear eyed about the use of AI and treat any claims with some healthy skepticism.

There are also critical concerns about digital access, data privacy, and sustainability. Not all users have access to reliable internet or digital literacy to meaningfully engage with digital tools. Reliance on AI or any technology contributes to the risk of furthering the digital divide in access to justice and furthering existing disparities.

Many AI models rely on providers with terms of service and data sharing practices incompatible with the required privacy protection in legal matters. We must be vigilant in the procurement processes and mindful of terms of service and data sharing structures so that we can protect the information used and potentially shared with AI models.

Finally, while AI tools may appear relatively inexpensive today, their long-term costs remain uncertain. If courts grow increasingly reliant on third-party providers, there is a real risk that future pricing models could become prohibitive. We must consider whether we can sustain the same level of service, accessibility, and accuracy if continued use of these tools becomes financially unsustainable.

3. What should we be using AI to do that we might not be doing in your view?

As we explore ways to use AI to expand access to justice, it is essential to consider who we are experimenting on. For people without legal representation, the consequences of flawed or underdeveloped AI tools can be profound. For this reason, we believe the safest and most impactful place to begin implementing AI is in internal court operations and staff-facing tools. These environments allow expert users to remain in the loop and evaluate AI output with subject matter expertise, minimizing the risk of harm to the public.

AI can support administrative workflows, conducting initial plain-language rewrites of forms, guides, or drafting resources, and even generating custom legal information. When paired with appropriate human oversight these “low risk” applications can create significant efficiency while preserving accuracy and trust in the systems. The same is true for experimenting with software development, where AI, if properly managed and used in support of human experts, can assist in rapid prototyping and development of proof-of-concept software for internal testing and

evaluation of potential utility, before those same human experts take the lead on the next phase of development.

Finally, another promising potential is the use of AI to support content management. As courts create and host more information both in-person and online, managing content becomes both more important and more complex. AI can be a valuable tool in ensuring that the information remains navigable, consistent, and reliable.

Testimony of Jeffrey Cox

Written Testimony of Jeff Cox, Director of Global Content Marketing of vLex and Board Chair of Bay Area Legal Services, for the New York State Bar Association's Panel on AI and Access to Justice

Introduction

Thank you for the opportunity to contribute to this important dialogue on artificial intelligence and access to justice. I come to this conversation drawing on my unique professional journey that spans legal practice, legal operations, legal technology, and access to justice leadership. As the current Chairperson of the Board of Directors of Bay Area Legal Services and Director of Global Content Marketing at vLex, I bring perspectives shaped by direct experience with both legal technology innovation and the practical challenges of delivering legal services to vulnerable populations.

My professional background—which includes roles at Orrick, Herrington & Sutcliffe as Senior Manager of Content Strategy, UniCourt as Director of Content and Data Acquisition, and Citigroup as Assistant Vice President of Legal Operations—has given me firsthand insight into how technology can transform both the business and practice of law. Throughout these roles, I've consistently worked at the intersection of legal data, technology adoption, and service delivery, with a particular focus on leveraging innovation to improve efficiency and access.

At Bay Area Legal Services, where I've served on the Board since February 2020 in various capacities including as Chair of the Veterans Committee and Chair of the Audit and Finance Committee, I've witnessed the enormous challenges legal aid organizations face in meeting overwhelming client needs. It is this combination of technology expertise and legal aid leadership that informs my perspectives on how AI might help bridge the justice gap—where, as the Legal Services Corporation has documented, "low-income Americans do not get any or enough legal help for 92% of their substantial civil legal problems."

1. What are you excited about regarding AI and access to justice?

I'm most excited about the opportunity to scale solutions to address the widening access to justice gap. For decades, the legal aid community has struggled with insufficient resources to meet overwhelming needs. Generative AI offers a genuine opportunity to serve more people faster and in more personalized, meaningful ways.

The practical AI-driven solutions already available can enhance productivity and quality across nearly every aspect of legal service delivery. Tasks that once took hours can now be completed in minutes: analyzing contracts, reviewing complaints, examining pleadings, studying depositions, assessing arguments for strengths and weaknesses, and enhancing client communications. This isn't just about efficiency – it's about fundamentally expanding the capacity of legal aid organizations to serve more clients with limited resources.

I'm particularly excited about the potential to provide consumers with better user experiences tailored to their specific needs at the moment they need help. AI has tremendous potential for

offering personalization at a level we haven't yet experienced in legal aid. At the end of the day, it's about the client – how can we make their experience better? AI allows us to use data about clients' lived experiences to serve them more effectively, making them feel that their story matters. The ability to rapidly combine the facts of their cases with the legal arguments needed is truly transformative.

What's particularly encouraging is that we're finally moving past many of the concerns that have historically held lawyers back from adopting AI. The legal profession has understandably been cautious about embracing these new technologies, with questions about reliability and confidentiality at the forefront. At vLex, we've systematically addressed these concerns through thoughtful design and implementation. For instance, we've tackled the hallucination problem through an approach that grounds all AI responses in authoritative legal sources, with direct links to primary law that attorneys can verify. Similarly, we've resolved client confidentiality issues through zero data retention agreements with large language model providers, ensuring that sensitive information isn't stored or used for model training. As these technological and ethical hurdles continue to fall, we're approaching an inflection point in the profession. Soon, the ethical question may no longer be whether to use AI, but whether it's ethical not to use it when it can dramatically improve client service and expand access to justice for those who need it most.

2. What are you worried about regarding AI and access to justice?

My primary concern is that we may not be meeting the moment. There's a risk we'll miss this opportunity to reimagine what's possible in legal service delivery. While legal technology over the last decade has certainly improved how we interact with clients, many advances have been incremental – automation at the edges rather than fundamental transformation. We must think bigger.

I worry about legal aid organizations having limited access to the powerful AI tools being developed for commercial players. The growing availability of AI-powered legal research and drafting tools is wonderful, but if these tools remain out of reach for legal aid organizations due to cost barriers, we risk widening rather than narrowing the justice gap. This raises serious questions about funding: do legal aid organizations have adequate resources to implement and maintain these systems? Without deliberate efforts to ensure equitable access to AI technologies, we may inadvertently create a two-tiered justice system.

The Need for Comprehensive Generative AI Policies

One of my deepest concerns is that many legal aid organizations lack comprehensive generative AI policies to guide responsible implementation and use. As these organizations begin exploring AI solutions, they need clear frameworks addressing data privacy, confidentiality, security, and ethical considerations.

The protection of client data must be paramount in these policies. I'm particularly concerned about ensuring that client information isn't being used to train generative AI models. This is a significant issue that should be front of mind for all legal aid organizations, especially those that might be tempted to use readily available consumer AI tools like ChatGPT without adequate safeguards.

One essential element of any responsible generative AI policy should be establishing zero data retention agreements with AI providers. At vLex, we've implemented such agreements with large language model providers, ensuring that when a client uploads confidential documents or submits sensitive queries, that data isn't stored by us nor by the LLM provider. This means the data won't be used to train future models, preserving client confidentiality.

Without such agreements and clear policies, legal aid organizations risk compromising client confidentiality and potentially violating ethical obligations. I fear that many organizations might not yet appreciate the sophistication required here – they might start using AI tools without understanding these crucial confidentiality implications. Legal aid organizations need to develop policies that address not just what AI can be used for, but how it should be used responsibly with appropriate safeguards.

I'm also concerned that we're getting bogged down in traditional questions concerning unauthorized practice of law, even as millions of people are already using Google daily to answer legal questions without lawyers ever being involved. We need to recognize this reality and develop responsible AI solutions that can provide basic legal information for the many people who will never have access to a lawyer.

3. What should we be using AI to do that we might not be doing in your view?

First and foremost, we should be using AI to help streamline client intake. Whether it's an AI system assisting call center staff in real-time, an AI agent interacting with clients to ask initial questions, or AI analyzing calls to determine legal issues and eligibility, this represents a massive opportunity. Intake is one of the biggest challenges for legal aid organizations handling tens of thousands of calls annually. How do you triage effectively? How do you assist everyone, even those whose cases you can't take on? AI can help find more bandwidth for our teams by managing aspects of the intake process and helping attorneys quickly understand client issues.

Leveraging Organizational Data Assets Through Effective Data Governance

We should also be leveraging AI to better utilize the treasure trove of documents, content, and templates that legal aid organizations have built up over time. Many organizations are sitting on massive "gold mines" of data that could be used to develop templates, train specialized models, or extract institutional knowledge.

Drawing from my experience developing data governance frameworks at UniCourt and implementing content strategies at Orrick, I've seen firsthand how effective data management can transform an organization's capabilities. For legal aid organizations, the first step is conducting a comprehensive data inventory to understand what information assets exist and how they're currently structured. This includes identifying all document repositories, case management systems, intake forms, and knowledge bases that might contain valuable data.

The challenge of data governance – structuring, tagging, and preparing this information – is significant, but AI itself can help with these tasks. Modern AI tools can assist with document classification, metadata extraction, and even identifying patterns across document collections that

humans might miss. This creates a virtuous cycle where initial AI implementation helps organize data, which in turn makes future AI applications more effective.

Organizations should establish clear taxonomies and standards for document labeling, ensuring consistency across their collections. They should also develop explicit policies about data retention, privacy, and usage rights. These governance frameworks aren't just technical exercises – they're essential foundations for ethical and effective AI implementation. Without them, even the most sophisticated AI tools will struggle to deliver meaningful results from disorganized data.

Legal aid organizations shouldn't wait too long to begin organizing and leveraging the data they already possess. The value locked in these existing assets can be substantial, potentially enabling more personalized client service, faster response times, and more comprehensive legal assistance without requiring additional human resources.

Beyond direct legal practice, AI offers substantial opportunities for the business operations of legal aid organizations. Development teams can use generative AI to create more effective fundraising materials and social content, improve messaging, and personalize communications for supporters. AI can analyze messy data files, create transcripts from recordings, and handle numerous non-legal tasks that nevertheless impact organizational effectiveness.

AI also presents opportunities to improve lawyer satisfaction and retention in legal aid. By automating routine tasks and administrative burdens, we can create a better work-life balance and make legal aid work more sustainable and enjoyable. At a time when many legal aid organizations struggle with recruitment and retention, this benefit shouldn't be overlooked.

Conclusion

The integration of AI into legal aid isn't just about technology – it's about reimagining how we deliver justice to those who need it most. At Bay Area Legal Services, we're committed to creating pathways to justice through legal services, education, and community partnerships. Through our Pathways to Justice Campaign, we're working to cultivate a culture that embraces innovation while honoring the traditional values of legal service. AI represents a powerful new tool in this mission.

As we navigate this rapidly evolving landscape, we must balance excitement about AI's transformative potential with thoughtful consideration of the ethical, practical, and access challenges it presents. Legal aid organizations, bar associations, courts, technology providers, and funders must collaborate to ensure that AI serves as a force for narrowing rather than widening the justice gap.

Throughout my career—from my early days at Citigroup developing legal operations solutions, to my work at UniCourt leveraging court data for improved access to legal information, to my current role at vLex educating legal professionals about best practices for using AI-powered platforms, and my service with Bay Area Legal Services supporting vulnerable populations—I've seen how technology can either reinforce existing inequities or help dismantle them. The difference lies in intentional design, thoughtful implementation, and a commitment to equity.

I believe we stand at a pivotal moment for access to justice. If we approach AI with intention, creativity, and a commitment to equity, we have the opportunity to dramatically expand our ability to serve vulnerable populations and move closer to fulfilling the promise of equal justice for all. The question isn't whether AI will transform legal aid – it's how we will shape that transformation to best serve those in need.

Thank you for the opportunity to contribute to this important conversation.

Testimony of Sateesh Nori

Just Tech LLC

AI and Access to Justice in 2025

New York State Bar Association

May 21, 2025

Chair, members of the committee, colleagues, and guests,

Thank you for the opportunity to testify before you today on one of the most pressing and promising developments in our profession: the intersection of artificial intelligence and access to justice.

I come to this discussion not as a technologist, but as a tenant attorney who has spent decades in housing courts in New York City, as a legal educator at NYU Law, and as someone who has seen the devastating gap between what our legal system promises and what it delivers—especially for the most vulnerable.

I now have the privilege of working with Just Tech to develop AI tools designed to serve low-income clients.

So my position is grounded in both the courtroom and the lab, in both reality and technological possibility. In fact, my upcoming book: “The Augmented Lawyer: AI and the Future of the Legal Profession,” addresses many of these issues.

Today, I want to address five key areas:

1. AI as a force multiplier,
2. The affordability of AI tools,
3. The urgent need to teach AI in law schools,
4. The importance of making legal AI available directly to consumers,
5. And the need to abolish the outdated and exclusionary rules surrounding the unauthorized practice of law.

Let me begin with the first.

I. AI as a Force Multiplier

AI is not going to replace lawyers—but it is going to redefine what lawyers do, and how much they can do. In a country where 92% of civil legal needs go unmet, the legal profession does not face an employment crisis. It faces a capacity crisis.

Right now, we are totally and utterly failing to deliver legal services to most people. And the gap is growing.

AI is uniquely capable of amplifying our efforts. It can draft pleadings, summarize case law, triage intake, and even explain legal processes in plain English. For overburdened legal aid organizations, this is not a threat—it is a lifeline. AI can handle the repetitive and standardized tasks that now consume attorneys' time, freeing us to focus on the parts of practice that require judgment, empathy, and advocacy.

We have seen this firsthand. Tools like the Roxanne the Repair Bot which I developed with the folks at Josef Legal, have helped tenants understand their rights and communicate with landlords in more informed, strategic ways—without needing to wait weeks for a lawyer to call them back. These systems are not theoretical. They work.

AI allows one lawyer to do the work of five. But more importantly, it allows non-lawyers to participate in the legal system with a level of confidence and clarity that was previously impossible.

II. AI is Accessible—and Therefore Transformative

One of the myths we must dispel is that AI is only for elite law firms or Silicon Valley-backed startups. The truth is that large language models, when responsibly implemented, are becoming increasingly affordable and open source.

A nonprofit legal aid group today can integrate an AI tool for document review, client correspondence, or internal research at a fraction of the cost of hiring additional attorneys or paralegals. The marginal cost of serving an additional client approaches zero.

This is not just about efficiency—it is about equity.

Access to high-quality legal guidance should not depend on whether a person can pay \$400 an hour. With AI, we can flatten the resource hierarchy that has long defined the legal system. We can offer the same quality of legal reasoning—drawn from the same databases and precedent—to someone in Elmira as to someone on the Upper East Side.

For legal services providers, AI levels the playing field.

III. AI Must Be Taught in Law Schools

If we are serious about preparing the next generation of lawyers, then AI literacy must become a core part of legal education. Right now, most law students graduate without even a passing familiarity with the tools that are already reshaping practice.

That is unacceptable.

Law schools must treat AI as they once treated legal writing or research—as fundamental. This means going beyond one-off electives. It means integrating AI into doctrinal courses,

clinical programs, and bar prep. Students should graduate not only knowing how to use AI, but how to critique it, regulate it, and improve it.

At NYU, I have seen the hunger among students to engage with this topic. They understand that the profession they are entering will not look like the one that existed 10 or even five years ago. They want to be prepared. It is our responsibility to give them the tools to be not just competent but visionary.

If we do not do this, we are failing our students—and, by extension, the clients they will serve.

IV. AI Tools Must Be Available Directly to Consumers

Here is a hard truth: most Americans will never have access to a lawyer. Not for housing, not for debt, not for immigration. If we gatekeep AI tools behind law firm walls or bar association logins, we are simply entrenching the existing injustice.

AI can—and should—be made directly accessible to the public. With clear disclaimers, built-in ethical safeguards, and up-to-date legal data, we can empower people to solve their own legal problems. This is not unauthorized practice. It is survival.

There are already examples: Upsolve’s bankruptcy tool, Roxanne, and others. People are using these tools because there is no alternative.

We should not be asking how to protect lawyers from AI. We should be asking how to protect the public from a legal system that still assumes a lawyer is the only pathway to justice.

V. The Unauthorized Practice of Law Must Be Reimagined—or Abolished

Let me close with what may be the most controversial point: it is time to abolish or fundamentally reform UPL laws as they currently exist.

These rules were built to protect consumers from fraud—but too often they are used to protect lawyers from competition. They prevent community advocates, technologists, and even nonprofit organizations from providing legal information unless a licensed attorney is involved.

That is not protection. That is exclusion.

In New York, as you know, Upsolve was sued for UPL violations for helping low-income New Yorkers file for Bankruptcy. That case is still pending. But the deeper issue is this: we cannot solve the justice gap by clinging to 20th-century guild rules.

We need a new framework—one that is risk-based, evidence-informed, and focused on outcomes. The question should not be, “Did a lawyer draft this?” but rather, “Did this help someone solve a legal problem fairly and accurately?”

If AI can do that—and increasingly it can—we should celebrate it, not regulate it out of existence.

Conclusion

AI is not a panacea. It is not without risk. But neither is it a threat to be feared or stifled. It is a tool—a powerful one—that can bring us closer to the ideal of equal justice under law. We are in a crisis- one that is growing. We cannot hedge on potential solutions.

The question is whether we have the courage to let go of our old assumptions. Can we, as lawyers, accept something that is less than perfect?

People don't want lawyers, they want solutions to their life problems.

Are we ready to imagine a legal system that is more democratic, more accessible, and more humane?

I hope so.

Thank you.

Sateesh Nori
Senior Legal Innovation Strategist
Just Tech LLC

Testimony of Randal Jeffrey

**Randal Jeffrey, General Counsel,
New York Legal Assistance Group (NYLAG)**

May 21, 2025

I would like to thank the New York State Bar Association’s President’s Committee on Access to Justice for this opportunity to submit this testimony for the hearing *Artificial Intelligence and Access to Justice in 2025*. My name is Randal Jeffrey, and I am the General Counsel at the New York Legal Assistance Group (NYLAG). NYLAG uses the power of the law to help New Yorkers in need combat social, racial, and economic injustice. We address emerging and urgent legal needs with comprehensive, free civil legal services, impact litigation, policy advocacy, and community education. NYLAG serves immigrants, seniors, the homebound, families facing foreclosure, renters facing eviction, low-income consumers, those in need of government assistance, children in need of special education, domestic violence victims, persons with disabilities, patients with chronic illness or disease, low-wage workers, low-income members of the LGBTQ community, Holocaust survivors, veterans, as well as others in need of free legal services. NYLAG impacted the lives of nearly 130,000 individuals in 2024. My testimony today reflects my personal opinions, and not necessarily those of NYLAG as an organization.

Today’s topic is the transformative impact that Artificial Intelligence may have on the ability of those who cannot afford an attorney to access justice, in New York and around the country. My focus is specifically on the use of Generative AI (GenAI) to increase access to justice in New York. And I should note here that I used GenAI to assist with my research for this testimony, and to proofread it. That said, the words and opinions in this testimony are all my own.

To put it simply, from what I understand about GenAI and have seen in practice, it is hard to overestimate the impact that GenAI will have on access to justice generally, and on the delivery of civil legal services specifically. It has been just two-and-a-half years since ChatGPT was released to the public in November 2022, and already GenAI technology is being used both internally – as a legal assistant to help legal services staff with tasks such as conducting research and drafting and summarizing documents – and externally –interviewing potential clients, providing legal information, and explaining court decisions.

Today, I raise several questions about the use of GenAI, but do not provide answers for them. The questions must be answered by the legal services community as a whole. In answering these questions, it will be necessary to keep our clients – both those who we represent and those we turn away due to lack of resources – front and center. It is incumbent upon the legal services community to discuss, with intentionality, the proper role of GenAI as a tool in its client-centered practice.

Before delving into the “use cases” for GenAI in the delivery of legal services, I must first acknowledge that there are substantial and legitimate ethical and privacy concerns associated with the use of GenAI. I believe that these issues are, for the most part, solvable. The Rules of Professional Conduct provide a framework for integrating GenAI into our legal practice in an ethical manner, and privacy concerns have been raised and addressed as technology has

advanced throughout the digital age, including with such developments as email, cloud storage, and remote access, where client information is no longer stored on paper in desks and filing cabinets.

From my perspective, the fundamental question that needs to be addressed is what aspects of the practice of law will we be willing to delegate to GenAI. In thinking about this, several questions come to mind.

How well will GenAI be able to provide legal information? This use case is already widespread, and expanding. To minimize hallucinations and incorrect information, chat-bots can rely on retrieval-augmented generation (RAG) to provide information based on a legal service provider's own, pre-existing legal resources. But even with RAG, the quality of the information is not guaranteed, especially in response to nuanced or highly specific questions, and any such chat-bots must be fine-tuned and vetted.

How will the ability of GenAI to communicate with our clients – and those we do not have the capacity to serve – compare with staff communication to clients? Already, one study has found that GenAI has better bedside manners than doctors, in terms of the quality and empathy of its written communications. Students interact with GenAI to supplement classroom instruction, with GenAI able to explain concepts and convey information tailored to the student. The Arizona Supreme Court has created two avatars – Daniel and Victoria – to deliver summaries of court decisions to the general public in a quick and effective manner.

How good will GenAI be in conducting intake, whether through written questions and answers, or through conversational avatars? Legal services organizations commit a substantial amount of resources to intake, gathering demographic and other information required by funders, screening for eligibility for services, and obtaining information about the basic facts of the matter.

How good will GenAI be in creating legal documents? Missouri Tenant Help – which is funded by HUD and supported by various Missouri legal aid organizations – has an Eviction Defense Document Engine (EDDE) available not just to legal staff, but also to self-represented tenants, that “asks you questions and uses your answers to complete your court forms. You can save, edit, email, download, and print your completed forms.”

What other assistance will GenAI be able to provide to pro se litigants? The Minnesota State Bar Association approved a committee to establish a GenAI regulatory sandbox with the goal of improving access to justice; if implemented, this would use GenAI to assist pro se litigants to interact with the judicial system across a wide range of subject matters, without the direct intervention of a lawyer or legal services provider.

Will GenAI ever appear in court? Although this may sound implausible and, to lawyers, sacrilegious, there is no reason to assume that GenAI will not reach a point at which this will be possible. Already, one pro se litigant did attempt to use a GenAI avatar to present his employment case before the First Department in New York, although apparently only to convey the argument and not to generate it in real time. In a different context, Zoom founder Eric Yuan

sees a future in which a GenAI avatar can substitute in for him at certain meetings – not just to gather information, but also to accomplish tasks and make decisions.

In thinking about these questions, I find it helpful to put the GenAI use cases into three buckets: internal assistant; external assistant; and freestanding agent.

What Internal Functions Will GenAI do at Legal Services Organizations?

Using GenAI internally within legal services providers is perhaps the least controversial use of GenAI. If properly used, within this role GenAI acts as an internal legal assistant to the lawyer or other advocate who maintains the ultimate responsibility for any given task. Even this more limited use of GenAI has the potential to make traditional legal services more efficient and effective. In fact, the changes can be profound. But at the same time, the lawyer and advocate maintain the traditional relationship with the organization's clients.

What External Functions Will GenAI do at Legal Services Organizations?

Here, the primary question seems to be what role GenAI tools will play in interacting directly with clients. One can envision many such tasks. GenAI could conduct a complete intake, gathering all of the relevant information that a legal services office would need to decide whether to take the case for representation or other levels of service. GenAI could explain the status of the case, including any court or administrative agency decisions. This could be done in writing, or orally through an avatar.

Delegating some of these external tasks to GenAI could allow legal services staff to focus on more fundamental aspects of lawyering, such as providing legal advice, recommending a course of action, explaining the consequences of various options, making strategic decisions, and litigating cases before tribunals. Again, the question here will not be whether GenAI can take on some of a lawyer's tasks, but whether such use cases can be implemented in a manner that still puts the clients first.

What Freestanding Functions will GenAI Do?

Freestanding GenAI is the most controversial of use of GenAI. For me, freestanding GenAI means the provision of legal services without attorney involvement, either as a program of a legal services organization or as a separately managed application.

The primary barrier to this freestanding function is the unauthorized practice of law statutes. Some freestanding GenAI uses, though, can avoid UPL prohibitions by providing legal information, rather than legal advice. The dividing line between legal information that can be freely provided and legal advice that involves the application of the law to the facts of an individual's circumstances, of course, is not a clear one. But just as legal services providers post legal information on their websites, GenAI can provide such information in a manner sought by the user.

Beyond legal information, there is a whole spectrum of use cases that raise concerns. These start with document production, which may sound relatively simple, but can actually be quite complex. Then there is legal advice, which as noted is not too far from legal information. Finally, there is GenAI handling every aspect of a matter – drafting and filing documents, sending letters, corresponding via mail, and even making strategy decisions; basically everything save making appearances in court – for unrepresented litigants without any attorney involvement in the matter.

Conclusion

As I mentioned at the beginning of my testimony, I asked a lot of unanswered questions. One answer that I am fairly certain of, though, is that if the legal services community fails to use GenAI to fill the justice gap, others will. Even now, I can ask ChatGPT and other GenAI programs to produce any sort of legal document for me, and it will do so willingly. I can get what I would consider legal advice from Google (even though the answer includes a disclaimer, “For legal advice, consult a professional,” when a lawyer is out of reach, one may be tempted to rely on the Google response). I can even ask an avatar to represent me in Court. It is within this context that legal services providers, as a community, need to confront these questions in an intentional manner, so as to provide answers that ultimately benefit the client communities that we serve.

Testimony of Lisa Colpoys

Written Testimony of Lisa Colpoys to the New York State Bar Association President's Committee on Access to Justice: Hearing on Artificial Intelligence and Access to Justice, May 21, 2025

I'm Lisa Colpoys, and I currently serve as Senior Consultant to the AI Initiative of the Lawyers Trust Fund of Illinois. As the IOLTA program in Illinois, the Lawyers Trust Fund ("LTF") supports 55 civil legal aid programs throughout the state with critical funding that ensures they can carry out their missions to deliver legal services to a wide variety of vulnerable communities and individuals. The AI Initiative was launched in September 2024 to help legal aid programs understand, fully leverage the opportunities of, and navigate challenges presented by generative artificial intelligence. To be clear, the intent of this initiative is not to replace legal aid professionals with technology, but instead to support and supplement their work so they are better equipped to serve their clients and communities. I hope it can serve as a model for other state justice communities.

Generative artificial intelligence ("AI") holds transformative potential to enhance access to justice, particularly for underserved populations, including tenants facing eviction, survivors of violence, immigrants, debtors, and many others. AI-enabled technology can empower people who can't afford a lawyer to more effectively represent themselves and obtain better outcomes in their legal matters. While I recognize the ground-breaking work that is occurring across the country to develop AI tools to support self-represented litigants, the focus of my testimony is on the use of artificial intelligence to support legal aid professionals who represent and help people in need of legal services. In this testimony I will briefly discuss the following:

- Why legal aid lawyers and advocates should embrace the use of AI; and
- How we can encourage and support the use of AI by legal aid programs.

The Case for AI in Legal Aid

The "justice gap," which is the difference between the availability of and the need for civil legal services in the United States has been well documented, and has increased over the last 40 years. The Legal Services Corporation's most recent [Justice Gap Study](#) in 2022, found that "[l]ow-income Americans did not receive any or enough legal help for 92% of their civil legal problems." Many people never seek legal assistance, for a variety of reasons, but for those who do try to get help, legal aid organizations turn away half of them because they do not have sufficient capacity. These realities play out similarly across the country, in every state.

At the same time, the recent rise of Generative AI over the past 2-½ years is beginning to reshape the practice of law at all levels. While legal aid lawyers have not yet fully

embraced the use of AI in their practices, many are beginning to see how it can be useful. In October 2024 the Lawyers Trust Fund conducted a statewide survey of legal aid professionals in Illinois to learn about their perspectives on and use of AI.¹ Not surprisingly 90% of respondents said they were not using AI at all or using it only slightly in their work. However, half of all respondents said they are moderately or more motivated to use AI in their work and nearly two-thirds think their organization is open to their use of AI. These results are encouraging because they indicate an openness, and perhaps even a desire, by legal aid professionals to leverage AI in their work.

However, acknowledging AI's potential is only the beginning and translating that recognition to action is the next required step. As interest in AI has grown, I have been asked many times by legal aid leaders what AI tools their organization should use.

While this is a natural question, it may not be the most strategic starting point. Legal aid professionals should begin by identifying the specific challenges they face and the pain points in their daily work. Then they will be able to assess whether AI offers the right solution and whether the benefits align with their missions.

There are many reasons why legal aid professionals should embrace AI, and not only because it offers to increase efficiency and expand their capacity to serve more people, although those are key considerations for organizations that collectively meet less than 10% of the need for their services. When deployed responsibly and with the appropriate guardrails, AI can help legal aid reach communities traditionally left out of the legal system, reduce administrative burdens that drain capacity, and hopefully give overworked legal aid professionals some needed work-life balance. This last point is particularly important because it supports the mental health of legal aid lawyers, who are often susceptible to burnout.

Encouraging and Supporting the Use of AI by Legal Aid Professionals

Legal aid lawyers are overwhelmed by the volume of people who need their help, and frankly these days they may have more important issues to address than figuring out how to use AI, such as how to keep their organizations funded and how to support vulnerable clients. Of course AI can help them address those issues too, but legal aid professionals first need encouragement and support to understand the potential of AI and how it can be used in their practices. They also need time and space to experiment, to learn how to use AI technology, and to integrate AI tools into their daily work.

In Illinois, the Lawyers Trust Fund has invested in providing necessary encouragement and support to all the legal aid programs it funds. Through its AI Initiative, LTF supports staff members at grantee organizations with educational programs, interactive learning

¹ See the attached slide presentation for a summary of results from this survey.

opportunities, technical assistance, and curated resources. Funding entities in other states, including New York and California, and the federally funded Legal Services Corporation are also investing in training on AI for legal aid professionals.

By starting with a survey of legal aid professionals we sought to understand what their thoughts are about the use of AI and where they are in their journey. Based on the survey results we designed several mechanisms and programs to encourage and support learning about artificial intelligence and how it may be used in legal aid, including the following:

1. An “Intro to AI” webinar series to provide legal aid professionals with basic knowledge about what artificial intelligence is, how to communicate effectively with AI tools, how to create an AI use policy, and the ethics of AI in a legal aid practice. The webinars were hosted live over Zoom and the recordings are available for replay on demand.
2. A statewide moderated discussion group on the use of artificial intelligence in legal aid provides a forum for legal aid professionals to ask questions and learn about various topics related to the use of AI.
3. Weekly virtual AI office hours that legal aid professionals can attend to ask questions and share their experiences with AI. Some sessions feature experts discussing AI related topics or AI vendors demonstrating how their tool can be used by legal aid professionals.
4. Peer learning groups of 6-10 people from different organizations are evaluating specific use cases for AI, testing AI tools, and developing best practices. The first cohort is evaluating AI grant writing tools. At the end of their work a report will be released that will benefit the entire legal aid community. Soon another group will convene to assess how AI can be used by public benefits lawyers who represent claimants for disability benefits.
5. An online resource library of relevant articles, guides, sample policies, training webinars, vendor demo videos, and more.
6. An opportunity for one-time funding for purposes or projects related to justice innovations (including AI), among other LTF strategic initiatives. This money may be used to purchase software, AI licenses, consulting services, training, and related products and services.

These efforts are designed to help legal aid professionals harness AI responsibly. A very real concern is that legal aid organizations will fall behind their counterparts in the private bar in adopting AI because of resource disparities. AI systems are often expensive, and legal aid organizations frequently lack the budget and in-house technical expertise to evaluate and implement them. If legal aid lawyers and professionals do not understand how AI can be used to support their work and they are not at the table to shape how AI will be used, they risk having it deployed in ways that will negatively impact their clients and will widen the justice gap. The time for legal aid lawyers to embrace AI is now, so they can help ensure that justice is more, not less, accessible in the future.

Legal Aid Community Perspectives on AI: Survey Results & Insights

Lawyers Trust Fund of Illinois
February 18, 2024

Overview

AI Survey Objectives

Methodology

Key Findings

Recommendations & Next Steps

Legal Aid Community Survey Objectives



Uncover, understand current awareness & adoption of AI



Identify concerns and potential challenges



Determine training and support needs



Gauge level of motivation to use AI



Collect baseline data

Methodology

Surveyed Illinois legal aid professionals between Oct 3 - 22, 2024 (20 days)

Distributed survey through these channels:

3 emails to all 48 LTF grantees with a request to distribute to team.

3 emails to 20 contacts from discovery meetings in Sept.

3 posts to the [AI in Legal Aid Google Group](#).

Methodology

Survey instrument had **15** questions: 10 on AI use & opinions, 5 demographic.

Estimated time to complete: **5 minutes**

Number of responses: **376**

Number of employees at LTF grantees: **1612**
(most recent available #, from CY 2023)

Response rate: **23.33%**

Results Preview (Spoiler Alert!)

Respondents' demographic characteristics tracked with legal aid workforce.

Most respondents were **not very familiar** with and **do not use AI** in their work.

Most respondents are **at least moderately (or higher) motivated** to use AI at work.

The top concern is **accuracy** of AI results.

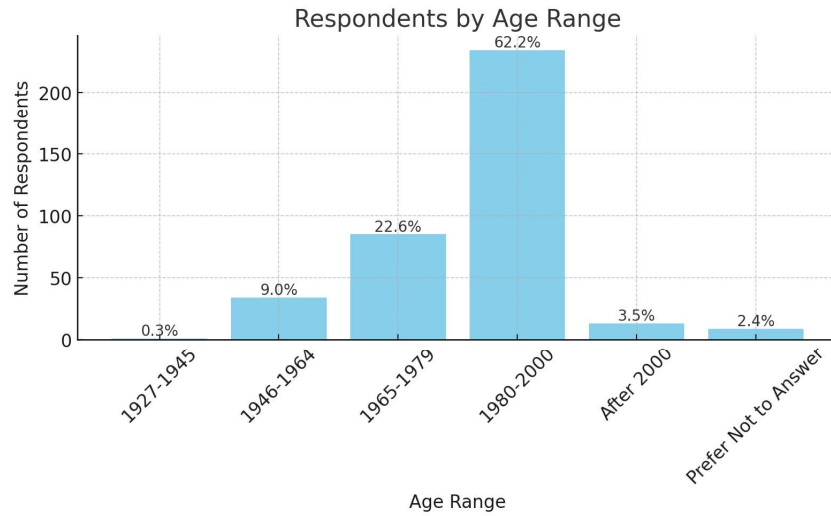
Survey Demographics: Who Responded

Alignment with legal aid workforce

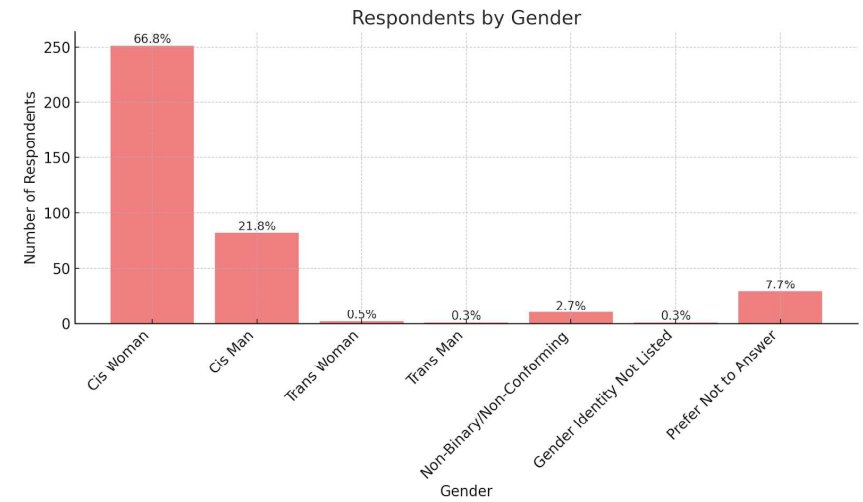
- Demographic information aligns closely with data in LTF's 2024 [Legal Aid Grantees & Services](#) report.
- The highest percentage reported for each category were white, cis-woman, millennial, attorneys

	Gender	Age	Race/Ethnicity	Role
LTF Report	73% cis-woman	62% millennial	54% white	42% attorney
AI Survey	67% cis-woman	62% millennial	60% white	30% attorney

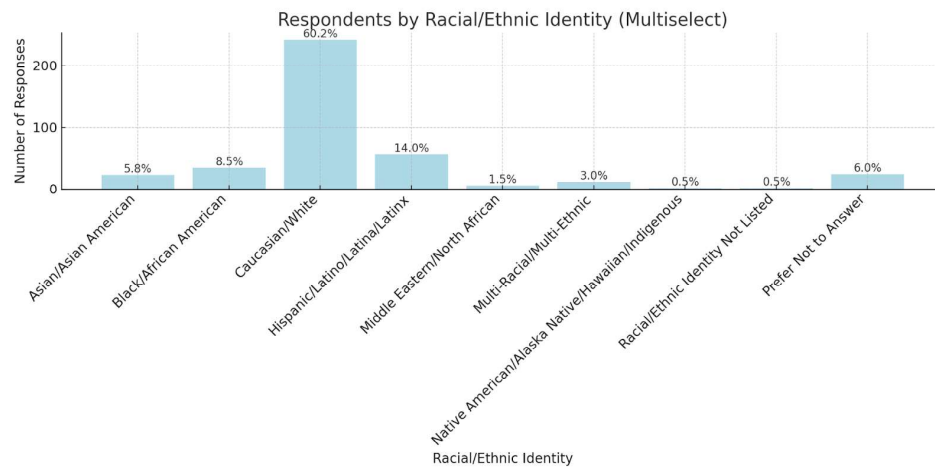
Respondent Age



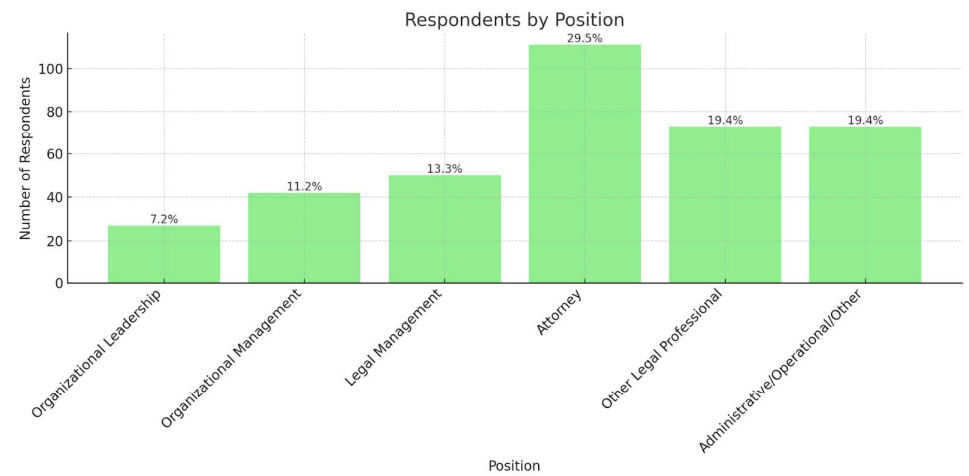
Respondent Gender



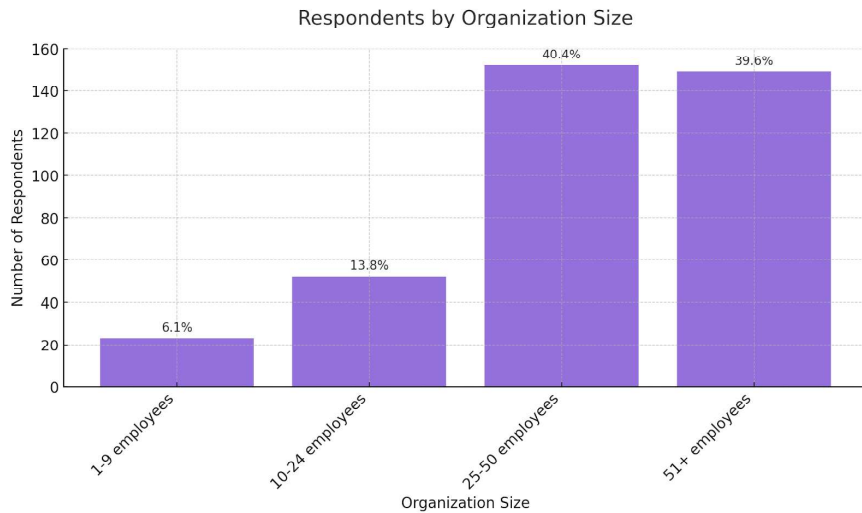
Respondent Racial/Ethnic Identity



Respondent Primary Role



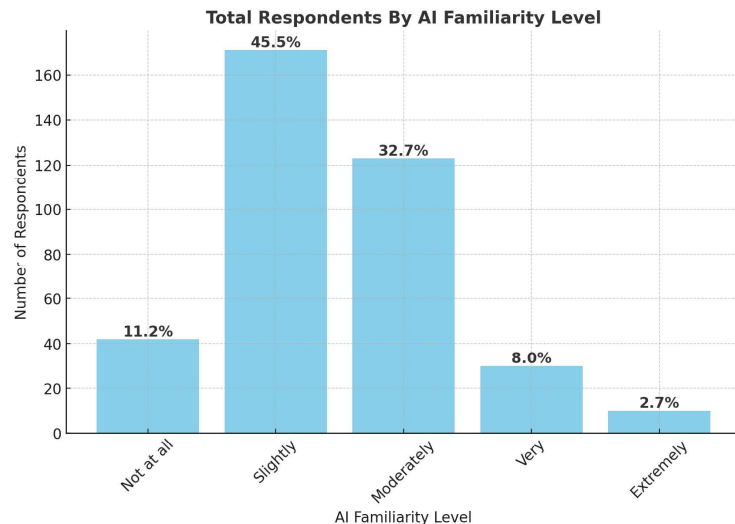
Respondent Organization Size



Survey Results: Key Findings

Familiarity with AI

Most respondents are not very familiar with AI.



Familiarity with AI by Demographic Categories

Those reporting higher AI familiarity levels are:

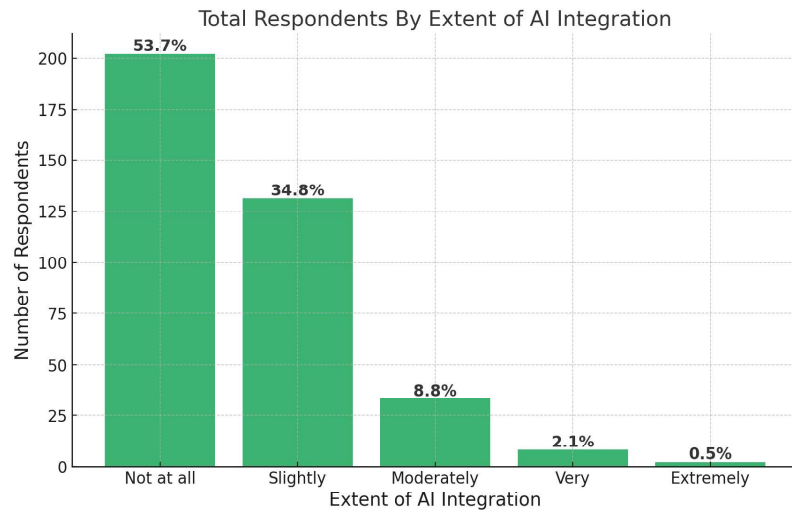
- Younger
- In non-legal roles
- Work at larger organizations

Gender did not significantly affect familiarity, except cis-men had a 10x higher percentage of “Extremely” familiar responses than cis-women

Racial/Ethnic identity had no significant effect on AI familiarity.

Current Use of AI

Nearly 90% do not use AI or use it only slightly in their work.



Current Use of AI by Demographic Categories

Very little difference in integration of AI into work by demographic categories – Nearly all “Not at all” or “Slightly.”

For all genders, ages, and races/ethnicities the most prevalent response was “Not at all.”

Org leaders and managers integrated AI into their work slightly more than other roles (but still only “Slightly.”)

People at larger organizations integrate AI into their work more than small orgs.

Insights: Current Use of AI

- Low integration of AI suggests potential **barriers to adoption** such as lack of familiarity, ethical concerns, or resource constraints.
- **Leadership may be exploring AI** but not yet pushing for broad organizational adoption.
- Larger organizations may have **more resources to experiment with AI**.
- The numbers indicate that AI tools are still **more of a concept than a daily tool** for most legal aid professionals.

How Legal Aid Uses AI Now

Over half (55%) of respondents said they don't use AI at all in their work.

Top 5 ways the other 45% use AI:

- Writing & editing (69%)
- Brainstorming & ideation (39%)
- Research (33%)
- Administrative tasks (33%)
- Translation (28%)

How Can AI help?

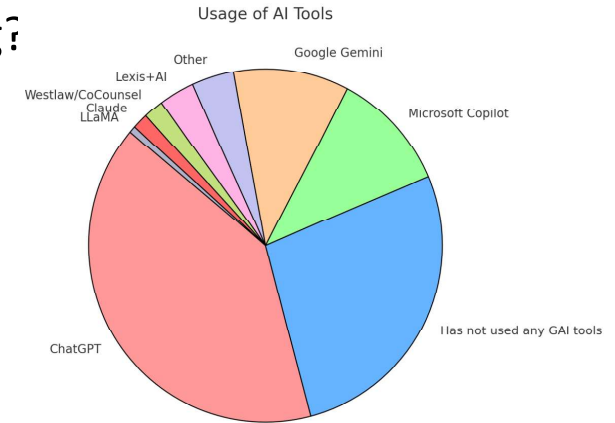
22% of respondents said they don't think AI will help them.

Top 5 ways the other 78% say AI can benefit them:

- Administrative tasks (65%)
- Writing & editing (54%)
- Forms automation (50%)
- Research (49%)
- Translation (47%)

Which GAI tools are people using?

- 36% have not used any GAI tools
- Most common = Chat GPT
- Very low legal research tools use



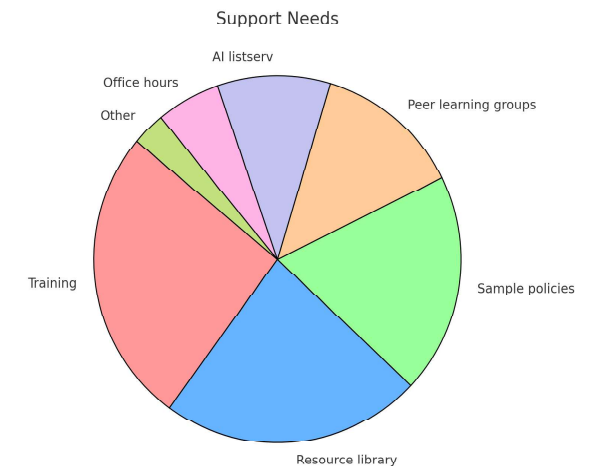
Concerns and Challenges

- Top concern = **Inaccurate results** (70%)
- Other top concerns*:
 - Ethical implications (53%)
 - Data privacy & security (52%)
 - Confidentiality (51%)
 - Bias (36%)
 - Lack of knowledge & skills (31%)

*3.5% wrote in environmental impact

Support Needs

- 66% of respondents want training
- At this time, passive methods of support are preferred over interactive support

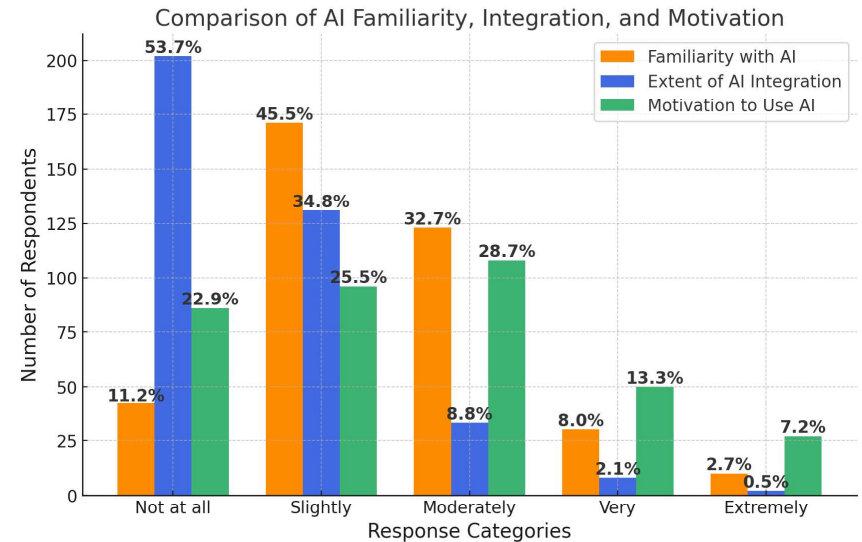


Training Topics

Top training requests = AI basics, ethics, & hands-on AI tool training (61% each)



Personal Motivation higher than Familiarity, Current Use



Personal Motivation by Demographic Categories

Half of all respondents are **moderately or more motivated** to use AI in their work.

Motivation is even across **genders and ages**.

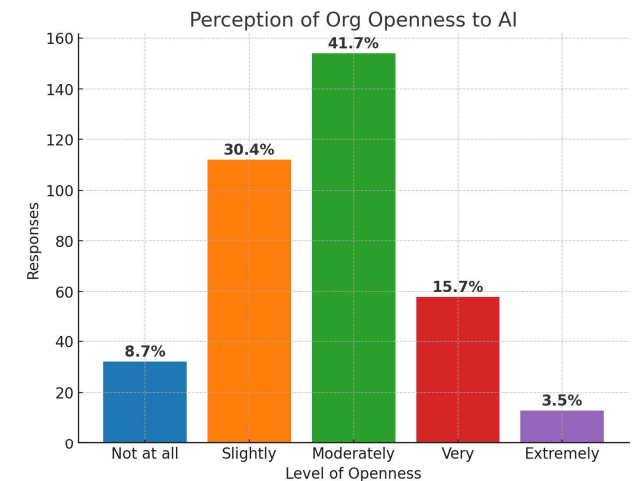
Black respondents were the **most motivated** to use AI and white respondents were the least.

Organization **leaders and managers** are slightly more motivated than others to use AI.

People at the **smallest programs lag behind those at larger programs**.

Perception of Organization Openness to AI

Nearly 2/3 think their employer is moderately or more open to using AI.



Summary of Key Findings

There is **higher personal motivation** to use AI than current familiarity and use levels.

Many **remain cautious**—concerns about accuracy, ethics, and privacy are challenges to adoption.

Training is tops—legal aid professionals want training on AI basics, helpful resources, and sample policies.

Initial interest in AI is focused on **efficiency**, not direct services.

Recommendations & Next Steps



Develop foundational AI training, resource library, and peer learning opportunities for interested professionals.



Foster discussions on use cases, policies, ethics, and other important AI topics.



Develop vendor engagement guidance and checklist.



Strategize about how to address major concerns and challenges.

Call to Action

1

Join the AI conversation!

- [AI Discussion Group](#)
- Weekly Virtual AI Office Hours

2

Share feedback and ideas.

- lisa@ltf.org
- [AI Discussion Group](#)

3

Discuss how you want to use AI, then join a peer learning group in the future to work with colleagues on solutions.

Q&A



QUESTIONS AND DISCUSSION
ENCOURAGED.



THANK YOU FOR YOUR TIME
AND PARTICIPATION!

Testimony of Sam Harden

Sam Harden, Esq.¹
Senior Innovation Manager
Pro Bono Net
sharden@probono.net

RE: NYSBA President's Committee on Access to Justice

To whom it may concern:

The following is my written testimony on generative AI for the NYSBA President's Committee on Access to Justice. I've divided these thoughts into three sections:

1. What encourages me about AI and access to justice;
2. Concerns regarding AI and access to justice; and
3. My suggestions for the NYSBA and NY-based organizations regarding AI.

I will note that these are my personal thoughts and opinions and not those of Pro Bono Net, my current employer. I appreciate very much the opportunity to give this testimony to the Committee.

Sincerely,

/s/Sam Harden
Sam Harden

¹ Licensed in Florida, FL Bar No 0069017

What encourages me about AI and access to justice

Increased capacity of attorneys

If used well, I believe AI could let attorneys operate more at the “top of their license” rather than spend their time handling rote or repetitive tasks. The following are a few examples of this, but is non-exhaustive:

1. A housing lawyer who is able to use an AI assistant to help them prepare for a court hearing docket. The AI assistant is able to give them a rundown of each client, case, details, and current status, as well as answer questions about each case and client.
2. An AI agent that is able to handle tasks like finding documents or handling other tasks based on a client file, just on verbal instructions. A plausible scenario based on current AI capabilities:

Lawyer: Do you remember where the diagnosis of COPD came from?

Agent: The diagnosis came from a visit in March to Dr. X's office, according to the case notes on the client intake interview?

Lawyer: Do we have the records from Dr. X's office in the file?

Agent: Checking - we do not have that record. Would you like me to prepare a medical records request to that office for them?

Lawyer: Yes please

Agent: [prepares medical records request, gives lawyer a link to review and sign]

3. An AI agent that receives case filings from an e-filing system and automatically sets dates on the lawyer's calendar for upcoming hearings and court appearances based on notices

Again, these are just three examples from a lawyer who has been out of full-time practice for many years. AI is a general-purpose tool that can do complex tasks well, and at volume, so I believe that there are many more use cases and efficiencies to be gained.

Self-Represented Users:

I also believe that AI can give self-represented people the increased ability to understand the legal system and handle their own issues. While there is plenty of “legal information” online in many different places, websites and online tools have traditionally been unable to synthesize it to fit a user's particular situation or facts. Part of that has been that, until now, the technology didn't really exist to do it in a quick way. Part of that has been the reluctance to do anything that could resemble giving someone “legal advice.” The following is an example of AI giving legal help, and that help vastly improving over time.

Gemini Deep Research answering legal questions:

Google Bard:

When Google Bard was first released in 2023, I used the anonymized Reddit Legal Advice Data Set and posed legal questions to the (then state of the art) model. The following is the question and Bard's response:

Question	Bard Response
<p>My boss hasn't paid me. What do i do?. I work in New Hampshire for a summer job thats 40 hours a week for 7 weeks. Its seasonal. Its run through a department of the town I live in, so I am employed by the town. My boss told me two things, and I'm not sure how to go about them.</p> <p>1) I can't get overtime. I'm not sure why not. Is there a rule/law for this? She "forgot" to pay us for a training session we had, so she said I have to wait until the seasonal employment is over in order to fill out a timesheet. Or put it in for a day I'm taking off.</p> <p>2) One week we spend an extra hour off-site. For the past two years, we did not get paid for that extra hour that 41 hour week. Should i be getting paid? How would I go about this professionally?</p> <p>Thanks for any & all help.</p>	<p>Hi there,</p> <p>I'm sorry to hear that your boss hasn't paid you for your work. It sounds like you're entitled to overtime pay, and you should also be paid for the training session you attended.</p> <p>Here's what I recommend you do:</p> <p>First, gather your evidence. This includes your timesheets, pay stubs, and any other documentation that shows that you worked overtime or attended the training session. Then, talk to your boss. Be polite but firm, and explain that you believe you are entitled to overtime pay and payment for the training session. If your boss is unwilling to pay you, you can take the following steps:</p> <p>File a wage claim with the New Hampshire Department of Labor. You can do this online or by mail.</p> <p>Hire an attorney. An attorney can help you file a wage claim and represent you in court if necessary.</p> <p>It's important to note that you have three years to file a wage claim in New Hampshire. So, don't delay if you believe you're owed unpaid wages.</p> <p>As for the extra hour you worked off-site, you should also be paid for that time. You can talk to your boss about this, or you can file a wage claim if you're not paid.</p> <p>I hope this helps!</p> <p>Sincerely, Bard</p>

In a survey I ran of legal professionals back in 2024, survey takers rated Bard's response as 3.11 out of 5 for helpfulness, and at a 3.56 out of 5 for giving actionable next steps. You can view [an interactive dashboard of the survey responses here](#).

Gemini Deep Research:

When posed with the same question, the current version of Gemini Deep Research provides a shockingly better response. The model first creates a research plan and asks the user for feedback on it:

1. Research Websites
 - a. Search for New Hampshire labor laws regarding overtime pay for municipal employees.
 - b. Investigate New Hampshire regulations concerning payment for mandatory training sessions for employees of towns or municipalities.
 - c. Find information on the timeframe within which employees in New Hampshire must be paid for work performed, including training.
 - d. Research New Hampshire laws regarding payment for all hours worked, including any hours exceeding the regular schedule.
 - e. Look for resources or agencies in New Hampshire that handle wage and hour disputes for employees working for towns or municipalities.
 - f. Find information on how an employee in New Hampshire can file a complaint about unpaid wages with the relevant state authorities.
 - g. Search for best practices for employees in New Hampshire to professionally address concerns about unpaid wages with their employer.
 - h. Explore if there are any specific exemptions from overtime laws in New Hampshire for seasonal employees working for municipal departments.
2. Analyze Results
3. Create Report

Once the research plan is approved by the user, the model then searches the internet and creates a multi-page report for the user, with verifiable sources cited. The report is astoundingly in-depth and contains very nuanced analysis. Link to [report created by Gemini Deep Research](#).

The model is also capable of generating an "audio overview" - this is essentially a podcast between two speakers, with male and female-coded voices, discussing the findings from Deep Research. You can listen to the [audio overview here](#).

Creation of new AI-based self-help resources for specific legal issues

I also see the potential of legal self-service tools to be greatly enhanced by AI. Imagine AI-enabled tools for self-represented litigants to help them solve discrete problems. These tools can step in to provide assistance for situations where lawyers cannot or will not, due to

economic reasons. A good example would be small claims cases, where the value of the claim would be outweighed by attorney's fees if a party were to retain counsel. Tools such as <https://www.garfield.law/> could fill the gap for litigants.

Ability for legal aid organizations to quickly deploy and test tech solutions

Legal aid organizations can use AI to rapidly prototype solutions and test them. An example: a tenant's rights organization could use Gemini's coding feature to test out different flows for an online decision tree, within minutes. An example of one such online flow created with Gemini is here: <https://gemini.google.com/share/682a9c1c2674>

Before hiring a development firm, the organization could test this prototype out internally and with potential users, saving a large amount of time and money.

While this was created with what is now an experimental mode, its functionality will improve with time. It's not hard to imagine a future where organizations can essentially use AI models to do what they're currently paying development firms to do.

Concerns regarding AI and access to justice:

The accountability of AI companies to their users when providing quasi-legal services remains in question. I recommend reading the pleadings and motions in [Garcia v. Character Technologies](#), which is (as far as I know) a case of first impression on AI provider liability when a user takes action based on the AI model's responses. While this is a wrongful death case and only obliquely concerns liability over AI chatbots falsely labeled as mental health professionals (see the [Garcia complaint](#), para. 241). It's not a big leap in faith to imagine a suit for liability over a "legal advice" chatbot when a user follows bad advice to their detriment. Currently this is an unsettled area of law. See also: [Instagram's AI Chatbots Lie About Being Licensed Therapists](#).

While I am not a believer that State Bars should be the regulator of AI providers, for many reasons, I do believe that some type of "light touch" regulation is necessary to protect people.

I also worry that hallucinations will continue to be a problem. Both AI and humans get things wrong. But AI has four main disadvantages that typical humans don't have when getting things wrong:

1. AI can be *confidently* wrong, and then double-down on it;
2. AI can be wrong at a far greater speed and scale;
3. AI can be unaccountable after being wrong, and
4. People have a higher tendency to believe technology (like AI) is accurate over other humans

When it comes to things like hallucinating baking soda instead of baking powder in a recipe, the results can be harmless. But for things such as statutes of limitations, the consequences of a hallucination can be very costly.

Again, I do not believe that having State Bar Associations regulate AI companies because their products may be capable of giving legal advice is the answer. But I do not think our current tort liability structures are sufficient as de-facto regulation either, as evidenced by the [Garcia v. Character Technologies](#) case.

I also worry that State Bars' tendency toward over-regulation will hurt smaller, more legal-focused providers (both non and for-profit), while letting Google and OpenAI continue to allow their models to provide legal advice. Similar to the [Florida Bar's decision to regulate TIKD out of business](#) for competing with law firms, I worry that regulators will try and prevent smaller innovative companies from offering AI-enabled products (such as the <https://www.garfield.law/> product offered in the UK).

My suggestions for the NYSBA and NY-based organizations regarding AI:

There are two main things that I believe NY-based organizations should be doing with AI, if they're not already:

User testing with clinic participants or court users

As I mentioned above, organizations can now easily and quickly test out tech solutions with AI. Determining whether or not a solution is actually effective, however, requires user testing and experimentation inside an agile framework. As I [outlined in this article](#), I believe that organizations can now rapidly prototype and test out ideas *without* paying for intensive development or having an in-house development team. Once those ideas are proven through testing, the organization can then choose how and when to develop and deploy them.

Experimenting with AI use in-house for different tasks

I also believe that organizations should be experimenting with AI tools in-house to help them automate workflows and enable staff to save time on tasks. Many legal aid organizations use LegalServer as their matter management and reporting system, which has a very robust API ecosystem. This means that AI systems could be built that interface with LegalServer to do things like update cases, schedule appointments, create case documents, update clients on cases, and handle reporting tasks. Obviously, any time AI is integrated into a system that stores sensitive client data, security and privacy are key, but these risks can be managed.

Testimony of Kristen Sunday

Paladin

The Opportunity for AI to Help Close the Justice Gap

By Kristen Sunday

Written for the New York State Bar Association's
Panel on AI and Access to Justice

July, 2025

Introduction

Thank you to the New York State Bar Association's President's Committee on Access to Justice for the invitation to submit this testimony for the hearing on Artificial Intelligence and Access to Justice. As the Co-Founder and CEO of [Paladin](#), the leading pro bono management platform, I work with over 400 legal services organizations and law firms across the country who are exploring how artificial intelligence (AI) can support their legal aid and pro bono work. I am delighted to share my views on the opportunities and main concerns regarding incorporating AI into solving the justice gap, as well as four successful case studies for consideration.

Harnessing AI for Access to Justice

AI is rapidly reshaping nearly every industry, and access to justice is no exception. For legal services organizations (LSOs) who serve on the front lines for low-income individuals navigating legal crises, AI represents a transformational opportunity. These groups face chronic underfunding, staff shortages, and rising demand. Especially in this environment, AI's potential to streamline workflows, expand reach, and improve outcomes isn't just exciting; it's essential.

Across the country, pioneering LSOs are already demonstrating what's possible. From Tennessee to California to North Carolina to New York, AI is being deployed to automate expungement processes, power virtual legal information, accelerate case reviews, and support low-income tenants in need of essential housing information. These case studies are excellent case studies in potential AI use cases, and provide a foundational blueprint for other organizations.

Opportunities for AI and Access to Justice

The biggest opportunity I see for AI in enhancing access to justice is its ability to dramatically increase the scale and speed of legal aid beyond what humans can do, while keeping experts at the center of the process.

For example, at the Legal Aid Society of Middle Tennessee and the Cumberlands, the pro bono team created an AI-powered system that generates expungement petitions by reading anonymized criminal records, separating out convictions from charges, and identifying which of them qualify for expungement. From there, the AI tool was able to produce a draft petition for review and submission by the team's attorneys. In the past, this work had been conducted completely manually, but now takes a mere fraction of the time. To give you a sense of scale, at one single legal clinic, Legal Aid Society cleared 324 charges for 98 people in one day; *far* more than would've been possible without automation. This work isn't just about technical efficiency; it's truly about economic mobility for families who can now access housing and jobs previously denied due to criminal records.

The California Innocence Project is another great example of an LSO using AI for tedious and high stakes work. Partnering with Casetext's CoCounsel, they build an AI program that can sift through thousands of pages of case files, extract key details, including contradicting testimony, and even propose lines of questioning. This gives their attorneys an important starting point, and frees up time to focus on case strategy, rather than document review. For someone wrongly imprisoned, time saved and greater accuracy can mean the difference between continued incarceration and freedom.

In North Carolina, Legal Aid of North Carolina built an AI chatbot to power a 24/7 legal information assistant named LIA, which helps users understand their rights in plain language across topics like housing, family law, and consumer rights. The demand is incredibly high across the state, and Legal Aid of North Carolina is unable to answer many clients' calls due to capacity. In just a few months, the AI-powered portal had received over 95,000 views and helped thousands of individuals. In a world where most people facing legal issues never even speak to an attorney, this is a meaningful step forward.

Lastly, in an example of a technology serving both legal aid lawyers and the public simultaneously, New York City's Housing Court Answers created dual AI tools that help both internal staff navigate complex housing law, as well as another external-facing tool for tenants that answers basic legal questions online. These tools empower advocates and self-represented individuals alike, creating efficiencies and reducing staff pressure while delivering trusted information through human-in-the-loop development.

These are just a few of the AI-enabled breakthroughs taking place now. Together, they suggest a future where AI doesn't replace legal professionals, but rather increases their capacity, bringing help to many more people who desperately need it.

What to Watch

Despite the progress, real concerns remain.

First, whether the tools are built for internal legal aid use or are client-facing, accuracy and safety are paramount. Legal information and advice is high-stakes, and AI outputs must be rigorously vetted and held to a high standard. Most LSOs understand this, using human-in-the-loop models where legal experts review and validate AI responses. Still, the risk of hallucinations or incorrect guidance is real; especially if tools are deployed without appropriate safeguards.

Second, there's a growing divide between organizations that have the resources to implement AI and those that don't. Developing AI tools, even with open-source models, requires capacity, funding, and trust from leadership. Without targeted investment and public-private partnerships, we risk a two-tiered system: one where some LSOs can scale and serve exponentially more clients, while others fall further behind. Or even worse, one where for-profit companies gain access to the most advanced tools, where non-profits do not. Which is why I am a strong advocate for pairing the organizations to co-develop solutions for legal aid use cases.

Where to Start

A natural place to start with AI in the legal aid community is to leverage it for well-scoped use cases that allow us to scale legal information that already exists.

For example, every LSO, court help center, and clinic has internal FAQs, guidance docs, intake notes, and training materials. What's missing is the infrastructure to make that knowledge more accessible, navigable, and customized based on the individual's situation, all without having to speak with a lawyer.

Projects like Housing Court Answers and LIA are already doing this: organizing their knowledge into structured datasets, feeding it into safe, domain-specific AI tools, and iterating based on user feedback and internal expertise. This is replicable and scalable, and as we create blueprints for different areas of law and access channels, we should be open-sourcing them to the community.

In addition, I feel strongly that larger organizations must be funding and co-developing this type of foundational infrastructure, making it easier for LSOs everywhere to integrate with shared tools, vetted knowledge bases, and pre-trained models. The more we collaborate, the more effective and efficient the community will be.

Conclusion

AI presents one of the best chances we've had to meaningfully close the justice gap. However, it is a tool that must be shaped with care, thoughtfulness, safeguards, and iteration. Successful AI infrastructure for legal aid should aim to not replace lawyers, but rather, democratize legal information and advice for the common good. I appreciate the opportunity to share my perspective.

Appendix D – Sample Gen-AI Policy

(Below is intentionally blank)

Sample Gen-AI Policy 1

Artificial Intelligence and Machine Learning Policy for

DRAFT 02-09-2024
Attorney-Client Privilege

encourages our attorneys to use artificial intelligence (AI) tools to support their client representation, however, any use of such tools must be consistent with our legal, ethical, and professional obligations as lawyers. This includes, but is not limited to, ensuring that any content or information produced by AI tools is reviewed for accuracy and completeness by the attorney using the technology.

This document is intended to provide high-level guidance regarding potential risks associated with use of AI tools by attorneys and staff, as well as outline some acceptable uses of AI tools. Nonetheless, attorneys who choose to use AI tools are solely responsible for ensuring that such use is permissible under applicable law and rules of professional responsibility and for keeping abreast of any changes to such laws or rules which may affect or limit their use of AI tools.

This document includes:

1. “General Policy” for AI Tools
2. Specific Considerations for Public and Proprietary/Internal Tools
3. Summary of Representative Professional Duties

General Policy

1. Purpose:

goal is to leverage AI tools to assist in the representation of clients and to remain well-informed of technologies and tools that could benefit our clients. The new technology is not designed to replace attorneys or staff; it is a tool to assist attorneys and staff with primary mission of outstanding advocacy for indigent individuals charged with serious offenses. The technology is employed to guide, recommend, perform routine tasks, and support decision-making processes.

2. Data privacy:

The use of AI should always comply with local, national, and international data protection legislation. AI systems may not access any personal or client data unless said system is specifically authorized to use client data and strictly necessary and lawful.

attorneys and staff members may not upload or submit or client information or data to a public AI tool. If attorneys and staff intend to upload or submit or client information or data to a proprietary or internal tool, the agreement between and the tool provider must prohibit the provider from getting access to confidential client information or data and ensure that the tool adheres to data privacy and security standards.

attorneys and staff should refrain from using any tools that have not been reviewed by IT staff or other qualified professionals to confirm that adequate data security safeguards are in place.

3. Transparency:

AI applications must be comprehensible and transparent to end-users.

attorneys and staff who use content or information created in whole or in part by AI tools must disclose to their supervisor(s), team members, and/or clients, as appropriate, that work product contains AI-generated content or information.

4. Quality and Accuracy:

The quality and accuracy of AI tools cannot be guaranteed. Therefore, attorneys and staff members should only use tools that have been thoroughly vetted and approved for use and all uses of AI tools must be carefully evaluated to ensure the highest possible accuracy. will regularly test, validate, and update models to minimize errors and retain adaptability to new data or changes in law. All outputs from these tools should be thoroughly reviewed by an attorney and fact-checked to ensure their validity.

If any attorney or staff member is concerned with an outcome, they must notify IT immediately.

5. Bias and fairness:

The AI tools are to assist in the review of data. Depending upon the nature of the query and the requested reports, incomplete and skewed information may result. This skewed information can result from biases in the system or hallucinations. All outputs from an AI tool must be critically evaluated.

will only authorize use of tool that have been evaluated and reviewed for the influence of bias. attorneys and staff must inform the IT staff and management if they have reason to believe tools are producing hallucinated and/or biased content, information, or outcomes.

6. Responsibility and Accountability:

There must be a clear line of responsibility and accountability for decisions made with AI aid. The final decision-making power should rest with human attorneys and paralegals, not systems.

All attorneys and staff using AI tools must abide by the rules of the courts and/or jurisdictions relevant to the use of such tools in matters pending before their tribunals.

attorneys and staff must not use AI tools on their personal computers or devices for work related to representation of office or clients.

7. Authorship and Plagiarism

When attorneys or staff members utilize AI tools in their public defense work, they must consider intellectual property (IP) implications. AI tools have the potential to generate content or data that could infringe third-party IP rights, such as copyrights or trademarks.

While AI tools may be used to aid in drafting work product, they are not a substitute for attorney work. Attorneys must ensure that all work product is their own original work and that it is rigorously reviewed to ensure accuracy.

8. Training:

Staff will be trained to understand and properly use AI tools. Ongoing training of staff is mandatory. Training will include both the legal and technological implications of AI.

9. Innovation:

The goals of the integration of AI into practice include promoting innovation, increasing efficiencies in case processing, improving prediction models, allowing staff to focus on direct representation of clients.

10. Review:

This AI policy will be periodically reviewed to incorporate changes in attorney ethics, best practices, and technological innovations.

Additional Considerations for Specific Classes of AI Tools

Public AI Tools:

Definition: a “public” tool is one that can be accessed by anyone, such as by accessing a public website and/or downloading software onto your computer.

Risks:

- Information that is submitted to or generated by public AI tools, such as the public versions of ChatGPT and Midjourney, is less likely to remain private or protected, and may be used to further train the AI tool.
- Content produced by these tools may infringe the intellectual property rights of a third party.
- AI tools “hallucinate” and provide information that is inaccurate, including fake case citations.
- Public AI tools may contain computer viruses or malicious code.

Specific Considerations for Public Tools:

- [REDACTED] staff may not download new software onto [REDACTED] devices or networks without approval from [REDACTED] IT.
- [REDACTED] staff are prohibited from inputting any [REDACTED] information that is protected by attorney-client privilege, confidentiality, a protective order, or the Health Insurance Portability and Accountability Act (HIPAA).
- [REDACTED] staff are prohibited from inputting any personal or identifiable data about themselves, [REDACTED] clients, [REDACTED] files, [REDACTED] staff or other court personnel.
- Public tools may be appropriate for tasks such as: (i) revising or drafting new public-facing content for [REDACTED] websites or social media pages; (ii) summarizing public documents, such as public reports, journal articles, or newspaper articles; (iii) creating internal [REDACTED] documents or materials that are not intended for public distribution or dissemination; (iv) assisting with legal research, provided that all research is reviewed and verified by an attorney.

Proprietary or Internal AI Tools:

Definition: A proprietary or internal AI tool is an AI tool that [REDACTED] has vetted; is governed by a negotiated agreement between [REDACTED] and the tool provider; and that complies with [REDACTED] security protocols. Proprietary or internal tools may also be trained or fine-tuned on a data set owned or controlled by [REDACTED] will notify staff and maintain a list of approved

proprietary or internal AI tools. If you have questions about the status of a particular AI tools, please contact ██████████ IT.

Risks:

- While the risk is typically less than with public tools, content produced by proprietary or internal tools may still infringe the intellectual property rights of a third party.
- While the risk is typically less than with public tools, proprietary or internal tools may still “hallucinate” and provide information that is inaccurate, including fake case citations.

Specific Considerations for Proprietary or Internal Tools:

- Unlike public tools, proprietary or internal tools may be appropriate for use in case management or litigation support.
- Provided that ██████████ IT has vetted the tools, it may be permissible to upload confidential or proprietary information to the tools.
- Special care must be taken to ensure the output requested is accurate and does not contaminate the original data.

Representative Professional Duties

Duty of Confidentiality: Rule 1.6(c) imposes a duty on lawyers to make reasonable efforts to prevent the inadvertent or unauthorized disclosure of confidential information. Note [2] begins, “A fundamental principle in the client-lawyer relationship is that . . . the lawyer must not knowingly reveal information . . . related to the representation, whatever its source.” Use of AI tools could result in the disclosure of confidential information.

Duty of Competence: Rule 1.1 imposes a duty of competence on lawyers, which includes keeping up-to-date with technological advancements commonly used in legal practice. This could be interpreted to mean that if [REDACTED] staff members employ AI tools in their practice, they should comprehend how these tools function and be capable of explaining their use to clients when necessary.

Duty to Inform Client: Rule 1.4 mandates a lawyer to keep a client reasonably informed about the status of a matter and promptly comply with reasonable requests for information. If [REDACTED] staff members use AI tools to aid in a client's case, the client may have a right to be informed about this under Rule 1.4.

Duty to Obtain Client's Consent: Rule 1.6 prohibits a lawyer from revealing information related to the representation of a client unless the client provides informed consent. If an AI tool is used in a manner that could potentially disclose client information, this could violate Rule 1.6.

Nonlawyer Assistance: Rule 5.3 pertains to responsibilities regarding nonlawyer assistance. If an AI tool is viewed as a form of nonlawyer assistance, [REDACTED] staff members would have certain responsibilities under this rule to ensure that the AI tool's conduct aligns with the lawyer's professional obligations.

Sample Gen-AI Policy 2

Generative AI Policy

Effective Date: February 1, 2025

Introduction

[REDACTED] is committed to providing the highest level of service to our clients. This policy provides specific guidelines on the responsible use of generative artificial intelligence (AI) technologies at [REDACTED] including ChatGPT, Grammarly, Microsoft Copilot and other third-party generative AI services, which have the potential to greatly improve the quality of our work on behalf of our clients. In the adoption and utilization of these technologies, we are particularly vigilant about mitigating risks such as unintentional data leakage, biases in AI-generated content, and other potential ethical and security concerns. Ensuring our practices align with professional standards and ethics, especially regarding client confidentiality and data security, is paramount. [REDACTED] acknowledges the continuous development of generative AI technologies. This policy will be periodically reviewed and updated to reflect new advancements and ensure our practices remain aligned with the highest professional and ethical standards.

Definitions

- **Confidential Client Information:** Any non-public information that relates to a client's case or personal circumstances, which has been entrusted to [REDACTED] under the expectation of privacy.
- **Generative AI:** Computer systems and software, including tools like ChatGPT and similar third-party services, that use machine learning models to generate new content, predictions, or decisions from trained datasets.
- **Sensitive Information:** Data that, if disclosed, could result in harm or prejudice to [REDACTED] clients or the organization itself. This includes, but is not limited to, Personally Identifiable Information (PII) such as social security numbers, birthdates, and addresses.

Scope of Policy

This policy applies to all staff, interns, volunteers, and contractors at the [REDACTED] [REDACTED] who utilize any device to access [REDACTED] data, whether these devices are owned by [REDACTED] or personally owned by individuals. This includes, but is not limited to, computers, smartphones, tablets, and any other devices that can connect to [REDACTED] networks or access its data. The policy governs the use of generative AI technologies during the performance of duties or while engaged in activities associated with [REDACTED]

Professional Conduct and Ethical Considerations

In using Generative AI technologies, [REDACTED] staff must adhere to the Rules of Professional Conduct, ensuring that our use of technology does not compromise our commitment to providing competent and diligent representation to our clients. Each use of Generative AI must be considered carefully to ensure it meets the standards set forth by the New York State Bar Association (NYSBA) in their April 2024 report.¹

Permissible Uses of Generative AI

Generative AI technologies may be utilized for the following purposes:

- Conducting general information searches for non-confidential content, with the understanding that these searches do not replace more thorough legal research required for client services. Staff are cautioned to verify the accuracy and reliability of information obtained via AI-enhanced search engines.
- Synonym generation and alternative phrasing to improve document clarity.
- Assessment and enhancement of language accessibility.
- Simplification of complex legal terminology.
- Initial drafting of routine internal communications.
- Creation of non-sensitive document templates.

Prohibitions

Inputting or granting access to any confidential or sensitive client or organizational information into generative AI systems is strictly forbidden. This includes, but is not limited to, personal client details, case specifics, internal financial reports, and strategic planning documents. Examples of generative AI systems covered by this rule include, but are not limited to, platforms like ChatGPT, automated content generation tools, and predictive analytics software. Staff must ensure that these technologies do not store, process, or learn from such sensitive data under any circumstances.

Responsible AI Use and Risk Management

At [REDACTED] we are committed to balancing innovation with responsibility. Our policy mandates responsible use of generative AI technologies to minimize potential legal and ethical risks. This approach ensures that as we leverage the benefits of new technologies, we also protect our clients and uphold our ethical standards.

¹ <https://nysba.org/app/uploads/2024/04/Task-Force-on-AI-Report-draft-2024-04-02-FINAL.pdf>

Incident Response

In the event of a security incident involving generative AI technologies, including third-party tools like ChatGPT, the incident must be reported within 24 hours. The report should include details such as the nature of the incident, the third-party service involved, the systems impacted, potential data compromised, and initial observations. Staff must report incidents to their direct supervisor, the Director of Operations, or the vCIO. Prompt reporting is essential for mitigating risks effectively and securing our systems.

Review and Revision of Policy

This policy will be reviewed annually or as needed based on technological developments, especially advancements in third-party generative AI technologies such as ChatGPT. Adjustments will be made to ensure that our practices continue to protect client confidentiality and adhere to professional and ethical standards.

Acknowledgment of Understanding

All users of generative AI at [REDACTED] are required to sign an acknowledgment confirming their understanding and agreement to comply with this policy.

Name: _____

Signature: _____

Date: _____



Committee on Immigration Representation

December 18, 2025

TO: NYSBA's Executive Committee
FROM: Committee on Immigration Representation
RE: Report and Recommendations of the New York State Bar Association Standing

President's Committee on Access to Justice on Artificial Intelligence and Access to Justice in 2025

The Committee on Immigration Representation has voted to support the report and Recommendations of the New York State Bar Association's President's Committee on Access to Justice Report on Artificial Intelligence and Access to Justice in 2025. The committee voted in favor of supporting this report at a meeting held on December 17, 2025.

The Committee's support is grounded in the report's direct relevance to immigration representation and to the provision of legal services for low-income and underserved communities. Immigration law is uniquely complex, high-stakes, and resource-constrained, and immigrant clients face heightened vulnerability to misinformation, language barriers, fraud, and legal error, with consequences that may include detention, removal, and family separation. The report appropriately centers these access-to-justice realities and recognizes that any use of emerging technologies must expand capacity without compromising client protection, professional responsibility, or due process.

The Committee further supports the report because it adopts a measured and principled approach to the use of artificial intelligence in civil legal services. The report acknowledges the potential utility of AI for internal, staff-facing functions—such as research, drafting, intake triage, and administrative workflows—while expressly cautioning against premature client-facing deployment. It emphasizes the necessity of human oversight, clear governance structures, training, and accountability, and addresses material risks including hallucinations, unauthorized practice of law, confidentiality breaches, and the exacerbation of existing inequities, including those related to language access and the digital divide.

By rejecting efficiency-only narratives and affirming that human judgment, supervision, and care remain central to legal representation, the report provides a framework that is consistent with the Committee's longstanding commitment to ethical practice and the protection of immigrant communities. The Committee believes the report offers an appropriate basis for guiding future engagement with artificial intelligence in a manner that advances access to justice while safeguarding the integrity of the legal profession.

For these reasons, the Committee on Immigration Representation supports adoption of the report and its recommendations.

Respectfully submitted,

Committee on Immigration Representation
New York State Bar Association



Committee on Civil Rights

December 23, 2025

TO: NYSBA's Executive Committee

FROM: Committee on Civil Rights

RE: Report and Recommendations of the New York State Bar Association's Standing Committee, President's Committee on Access to Justice, Artificial Intelligence and Access to Justice in 2025

The Committee on Civil Rights has voted to support the report and Recommendations of the New York State Bar Association's President's Committee on Access to Justice Report on Artificial Intelligence and Access to Justice in 2025. The committee voted in favor of supporting this report at a meeting held on December 17, 2025.