



**MEMORANDUM**

**DATE:** October 15, 2007

**TO:** Members of the Board's Regulation, Admissions & Discipline Oversight Committee

**FROM:** Randall Difuntorum, Director, Professional Competence Programs

**SUBJECT:** RAD Meeting on November 9, 2007 – Current Year Update on the Status of the Professional Competence Unit

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This memorandum provides an update on the activities of the Professional Competence Unit. In addition to this memorandum, provided are the following: (1) Professional Competence Staff List; (2) Ethics Hotline Activity Statistics; (3) Volume of Ethics Hotline Calls by Paralegal; and (4) Professional Competence Budget Summary – Authorized v. Actuals. Board members with questions may contact me at (415) 538-2161 or Lauren McCurdy at (415) 538-2107.

**1. ETHICS HOTLINE**

- As of August 31, 2007, 9,712 member inquiries were received with a completion rate of 83%. This completion rate includes distribution of 486 copies of published ethics opinions and other written materials requested by inquirers and 4,087 referrals to information posted at the Bar's website. (As all of the published State Bar Formal Opinions are posted in the Ethics Information Area of the website, there is a decreasing need for distribution by mail.) Of the total calls, 1,274 were courtesy follow-up calls to members who placed a call to the Hotline, received a call back from Hotline staff but were not available at that time to take the call from the Hotline staff person. These members receive instructions on how to call-in and receive priority handling when they choose to return the Hotline's call at their convenience. However, sometimes they do not call and in those circumstances the Hotline initiates a courtesy follow-up call.
- For the period of June 1, 2007 through August 31, 2007, 25 voluntary satisfaction surveys were received from members who utilized the Ethics Hotline service. Each survey asks for a rating on several specified categories of service, including: satisfaction with the system for handling the calls; helpfulness of receptionist; helpfulness of paralegal; usefulness of materials sent; whether the inquirer would recommend the Hotline to others; and whether they received the assistance they needed. For the most part, the surveys received gave the Hotline very high marks. In addition, the Hotline received a letter of commendation for a staff person who assisted the member with an inquiry. (A copy of the surveys and the letter received are attached.)

- For the sixth year running, the Professional Competence office sponsored an exhibit booth at the State Bar Annual Meeting in Anaheim. Each year this exhibit booth features the Ethics Hotline program and the other professional competence resources administered by Professional Competence staff. We continued the prior "Ethics Hotline Café" theme, intended to help brand the Ethics Hotline program as a user-friendly member service that offers information on professional conduct issues that arise on a day-to-day basis. The branding effort seeks to dispel perceptions of the Ethics Hotline program as a crisis hotline that only addresses very serious ethical dilemmas that ordinarily arise on an infrequent basis. The booth staff included Ethics Hotline paralegals who answered ethics questions from exhibit hall visitors. As has been the case in prior years, the presence of Ethics Hotline staff at the State Bar Annual Meeting Exhibit Hall was very favorably received. Members who didn't pose questions often discussed recent professional responsibility developments with the paralegals through the vehicle of a PowerPoint game that allowed the members to test their knowledge of the Rules of Professional Conduct. In addition, many visitors simply stopped-by to express their appreciation for the Ethics Hotline program as a long-standing State Bar member service. To publicize the Ethics Hotline toll-free telephone number and the Ethics Information page at the State Bar website, over 600 free promotional items were distributed (including: imprinted coffee mugs; bookmark/magnifiers; compact mirrors; and, minimum value Starbuck's coffee cards in a personalized card holder). In addition, approximately 120 copies of an Ethics Resources CD-Rom, and 100 copies of a 2007 Rules of Professional Conduct pamphlet were distributed bearing the Ethics Hotline toll-free telephone number and the Ethics Information page URL.

## 2. COPRAC

- Since the last Professional Competence status report submitted for the Board Committee's July 19, 2007 meeting, COPRAC met on August 3rd and 4th, 2007 in Santa Monica at the chair's office of Bryan, Cave LLP and on September 27, 2007 at the State Bar Annual Meeting in Anaheim.
- The following opinions were approved by the Board Committee and published on August 14, 2007:

### Formal Opinion 2007-173 (Interim No. 05-0003)

- ISSUE:
1. May an attorney, consistent with ethical obligations, deposit a client's will or other testamentary documents with a private will depository, without the client's consent?
  2. May an attorney, consistent with ethical obligations, register a client's will or other testamentary documents with a private will registry, without the client's consent?

DIGEST: An attorney who retains a client's will or other estate planning documents on deposit may terminate the deposit in accord with the client's instructions and/or consent. If the attorney cannot locate the client, the attorney may only terminate the deposit pursuant to Probate Code section 700, et seq. An attorney may register certain identifying information about a client's will or other estate planning documents with a private will registry if the attorney can determine, based upon knowledge of the client, the client's matter and investigation of the will registry, that registration will not violate the attorney's fiduciary duties of confidentiality and competence.

Formal Opinion 2007-174 (Interim No. 05-0006)

**ISSUE:** Is an attorney ethically obligated, upon termination of employment, promptly to release to a client, at the client's request, (1) an electronic version of e-mail correspondence, (2) an electronic version of the pleadings, (3) an electronic version of discovery requests and responses, (4) an electronic deposition and exhibit database, and/or (5) an electronic version of transactional documents?

**DIGEST:** An attorney is ethically obligated, upon termination of employment, promptly to release to a client, at the client's request: (1) an electronic version of e-mail correspondence, because such items come within a category subject to release; (2) an electronic version of the pleadings, because such items too come within a category subject to release; (3) an electronic version of discovery requests and responses, because such items are subject to release as reasonably necessary to the client's representation; (4) an electronic deposition and exhibit database, because such an item itself contains items that come within categories subject to release; and (5) an electronic version of transactional documents, because such items are subject to release as reasonably necessary to the client's representation. The attorney's ethical obligation to release any electronic items, however, does not require the attorney to create such items if they do not exist or to change the application (e.g., from Word (.doc) to WordPerfect (.wpd)) if they do exist. Prior to release, the attorney is ethically obligated to take reasonable steps to strip from each of these electronic items any metadata reflecting confidential information belonging to any other client.

→ At its August 3 & 4, 2007 meeting, COPRAC approved the following opinion for a 90-day public comment circulation ending on December 14, 2007.

Formal Opinion Interim No. 05-0005

**ISSUES:** What are a successor attorney's ethical obligations when her client in a contingency fee matter instructs her not to notify prior counsel, who has a valid lien against the recovery, of the fact or the amount of a settlement?

**DIGEST:**

1. When a client instructs successor counsel not to disclose a settlement to a prior counsel with a valid lien, successor counsel must advise the client of the adverse ramifications of concealing the settlement, including a potential claim by prior counsel against the client. Should the client persist, successor counsel must nevertheless disclose the settlement to prior counsel.
2. A lawyer may not reveal confidential client information except with the consent of the client or as authorized or required by the State Bar Act, the Rules of Professional Conduct, or other law. Disclosure is required by law to fulfill the attorney's fiduciary duties to prior counsel. Disclosure is also authorized by law to enable both attorneys to protect their right to recover fees.
3. While the successor attorney is both obligated and permitted to disclose the fact and the amount of the

settlement to the prior attorney, successor counsel may not disclose anything more to the prior attorney, without the client's consent, including the client's demand that the fact and the amount of the settlement be concealed from the prior attorney.

4. Once prior counsel is notified, both attorneys must remain mindful of their duty of confidentiality to the client in attempting to reach an accord, amicably or through legal process, on the proper allocation of fees. Moreover, should the attorneys resort to legal process to resolve any dispute over allocation of the fee, successor counsel should provide the client with notice and an opportunity to participate. In any legal proceeding, the presiding officer will be in a position to limit the disclosure of confidential information appropriately.

- At its September 27, 2007 meeting COPRAC developed comment letter in response to the *Frye vs. Tenderloin Housing Clinic* report circulating for public comment.
- COPRAC conducted four programs at the State Bar Annual Meeting held in Anaheim. The four programs sponsored by COPRAC were entitled "Duties to Third Parties," "Recent Significant Developments Affecting the Law of Lawyers," "Forming and Reforming the Attorney-Client Relationship," and "Recognizing and Avoiding Conflicts of Interest." With the exception of the "attorney-client relationship" program, all programs were selected to be video taped to be offered for on online self-study education. In addition, the Office of Professional Competence sponsored a program entitled "Ethical Fallout of Technology" presented by former RAD co-chair Judy Gilbert and former COPRAC chair Kevin Mohr.
- COPRAC's planning for the 2008 Annual Statewide Ethics Symposium has begun and the tentative plan is to hold the symposium on Saturday, May 3, 2008 in San Francisco.
- COPRAC's Rules Revision Commission Subcommittee is a standing subcommittee of COPRAC that monitors the work of the Rules Revision Commission. A liaison from the subcommittee attended the Rules Revision Commission's meeting on July 20, 2007, August 24 & 25, 2007 and September 28 & 29, 2007.
- On August 1, 2007 a member of COPRAC resigned due to health concerns. An interim appointment to fill the remaining term of the resigned member has been submitted to the Volunteer Involvement Committee and the Board of Governors for consideration at the Board's November 9, 2007 meeting.
- COPRAC's next meeting is scheduled for November 16, 2007 at the State Bar Offices in San Francisco. This is the first meeting of the new committee year, and a new member orientation session will be held at the beginning of this meeting.

### 3. RULES REVISION COMMISSION

- Since the last Professional Competence status report submitted for the Board Committee's July 19, 2007 meeting, the Rules Revision Commission met on July 20, 2007, and August 24 & 25 at the San Francisco State Bar office; and on September 28 & 29 at the State Bar Annual Meeting in Anaheim. At the July 20, 2007 meeting, the Commission finalized a group of five rules that were subsequently approved by RAD for circulation for a 90-day public comment period ending on October 26, 2007. These rules constitute the Commission's second batch of proposed rule amendments. At the Commission's August and September meetings, the Commission continued its work on its anticipated third batch of amendments. In particular, the Commission worked on proposed amendments to rule 2-100 (Communication with a Represented Party). The Commission's meetings on this rule have greatly benefited from the attendance of representatives from the California Attorney General, the California District Attorneys Association, the California Public Defenders Association, and the United States Attorney for the Central District of California, among others.
- In addition to the Commission's regular meetings, a public hearing to receive comments on the second batch of rules circulating for public comment was held at the site of the State Bar Annual Meeting in Anaheim on Saturday, September 29, 2007 from 2:00 pm to 4:00 pm. A representative of the San Diego County Bar Association Ethics Committee appeared and offered testimony. This representative addressed all five of the rules circulating for comment, expressing approval of four of the proposed rules as drafted and suggesting a possible clarification of the one other proposed rule.
- The Commission's next meeting is scheduled for November 2 & 3, 2007 and will be held at the San Francisco State Bar office. Among the items anticipated to be considered at that meeting is proposed amendments to rule 4-100 (Preserving the Identity of Funds and Property of Client), and initial consideration of proposed amendments to the rules governing: trial conduct; contact with witnesses; and trial publicity.

### 4. COMPETENCE PUBLICATIONS

- Handbook on Client Trust Accounting for CA Attorneys:  
As of August 31, 2007, 54 copies have been sold. The online version of the handbook posted at the Bar's website was downloaded approximately 120,000times (this is an estimate as the website statistical reporting program is experiencing technical difficulties).
- California Compendium on Professional Responsibility:  
As of August 31, 2007, 97 copies of the Compendium updates were sold. The 2007 Compendium update is nearing completion, and is anticipated to be published shortly.

- CA Rules of Professional Conduct & State Bar (a.k.a Publication No. 250):  
As of August 31, 2007, 1,390 copies of the 2007 Publication 250 were sold and an online PDF version of the Rules of Professional Conduct posted at the Bar's website was downloaded approximately 17,000 times (this is an estimate as the website statistical reporting program is experiencing technical difficulties). Downloads of the PDF version are in addition to "hits" to individual rules that are posted in HTML.

## **5. COMPETENCE RESOURCES AT CALBAR.CA.GOV**

- Newly published Formal Opinion Nos. 2007-173 and 2007-174 were posted in the Ethics Information area of the website.
- Proposed Formal Opinion Interim No. 05-0005 (Client Instructions re: Prior Attorney's Lien) was posted at the Public Comment page of the website.
- The July, 2007 Discussion Draft presenting proposed amendments to five Rules of Professional Conduct was posted at the Public Comment page of the website
- A public hearing notice and registration form for the Commission's public hearing at the Annual Meeting to receive testimony on the July, 2007 Discussion Draft was posted at the Commission's page of the website.
- The meeting materials for the Rules Revision Commission's July 20, August 24 & 25, and September 28 & 29 meetings were posted at the Commission's Meeting Materials page of the website.
- An updated copy of COPRAC's roster of members was posted at COPRAC's homepage on the website.

cc: Marie M. Moffat  
Robert A. Hawley  
Doug Hull

## Professional Competence Staff List

<b>Professional Competence Staff Positions as of August 31, 2007</b>	
Number of Positions Authorized	14.5
Number of Positions Filled	12.5

<b>Professional Competence Employees as of August 31, 2007</b>	
	<b>Grade &amp; Classification</b>
	56EA – Director
VACANT	17A – Sr. Attorney
	16A – Attorney
	40C – Sr. Administrative Specialist
Filled on August 27, 2007	9 – Program/Court Systems Analyst (P/CSA)
	8 - Sr. Administrative Assistant
	8 – Paralegal
	8 – Paralegal
	8 – Paralegal
	8 – Paralegal
	8 – Paralegal
	8 – Paralegal
VACANT - posted	8 – Paralegal
	6 – Administrative Secretary
	4 – Data Analyst III
<p>NOTES: The P/CSA is a shared position between the Office of General Counsel and the Office of Professional Competence. In addition, though not represented in the above chart, casual hourly law clerks are used from time to time.</p>	

## ETHICS HOTLINE ACTIVITY STATISTICS - 2007

Month	Work Days	Incoming Calls	Completed Calls	Left Messages	Percentage of Incoming Calls that are Completed Calls	Percentage of Incoming Calls that are Left Messages	Resources Mailed/Faxed	Internet Resource Referrals
January	21	1324	1116	208	84%	16%	45	556
February	18	1100	859	241	78%	22%	57	481
March	21	1255	1107	148	88%	12%	73	545
April	21	1254	1061	193	85%	15%	76	516
May	22	1307	1062	245	81%	19%	60	497
June	21	1178	977	201	83%	17%	45	467
July	21	1090	908	182	83%	17%	62	509
August	23	1204	978	226	81%	19%	68	516
<b>Cumulative Totals</b>	<b>168</b>	<b>9712</b>	<b>8068</b>	<b>1644</b>	<b>83%</b>	<b>17%</b>	<b>486</b>	<b>4087</b>

### EXPLANATIONS

**Incoming Calls:** Total member inquiries to the Hotline received during that month.

**Completed Calls:** Member inquiries received in that month which were handled and resolved by staff during that month.

**Left Messages:** Member inquiries received that month where staff left an initial message or courtesy follow-up message, but did not reach the member to resolve the inquiry.

**Percentage of Incoming Calls that are Completed Calls:** Proportion of Incoming Calls that were Completed Calls handled and resolved by the staff.

**Percentage of Incoming Calls that are Left Messages:** Proportion of Incoming Calls where staff left a message but the member did not return the call.

#### Key Hotline Activity Averaged by Day and Month

(through August 31, 2007)

**Daily:** Incoming Calls: 58  
Completed Calls: 48

**Monthly:** Incoming Calls: 1,214  
Completed Calls: 1,009

#### Aggregate Outgoing Calls

**Current Month:** 1,813

**Cumulative to Date:** 14,769

This figure accounts for all calls placed by staff, including: Completed Calls, Left Messages and courtesy follow-up messages. Due to "telephone tag" with members, staff may place multiple calls and leave multiple messages prior to completing a call.

**Ethics Hotline  
2007 Monthly and Cumulative  
Individual Paralegal Call Statistics**

JAN					
Paralegal	Total Calls	Left Msg.	Completed Calls	Return Calls	Call Backs
1	319	112	207	94	4
2	431	206	225	65	45
3	340	126	214	74	0
4	491	192	299	89	0
5	202	58	144	93	0
6	53	33	20	0	53
<b>JAN TOTALS</b>	<b>1,836</b>	<b>727</b>	<b>1,109</b>	<b>415</b>	<b>102</b>

FEB					
Paralegal	Total Calls	Left Msg.	Completed Calls	Return Calls	Call Backs
1	245	91	154	49	3
2	336	145	191	58	0
3	338	129	209	76	0
4	462	203	259	93	1
5	189	58	131	94	0
6	95	49	46	0	95
<b>FEB TOTALS</b>	<b>1,665</b>	<b>675</b>	<b>990</b>	<b>370</b>	<b>99</b>

MAR					
Paralegal	Total Calls	Left Msg.	Completed Calls	Return Calls	Call Backs
1	350	130	220	95	1
2	379	199	180	67	36
3	451	172	279	109	0
4	456	176	280	98	0
5	208	59	149	106	0
6	96	53	43	0	96
<b>MAR TOTALS</b>	<b>1,940</b>	<b>789</b>	<b>1,151</b>	<b>475</b>	<b>133</b>

APR					
Paralegal	Total Calls	Left Msg.	Completed Calls	Return Calls	Call Backs
1	243	83	160	74	3
2	371	169	202	91	0
3	408	167	241	91	0
4	483	186	297	113	1
5	245	79	166	92	0
6	83	57	26	0	83
7	217	117	100	2	215
<b>APR TOTALS</b>	<b>2,050</b>	<b>858</b>	<b>1,192</b>	<b>463</b>	<b>302</b>

MAY					
Paralegal	Total Calls	Left Msg.	Completed Calls	Return Calls	Call Backs
1	328	130	198	107	0
2	397	191	206	76	0
3	381	152	229	104	0
4	537	210	327	118	0
5	124	38	86	60	0
6	62	41	21	1	61
7	265	156	109	7	258
<b>MAY TOTALS</b>	<b>2,094</b>	<b>918</b>	<b>1,176</b>	<b>473</b>	<b>319</b>

JUNE					
Paralegal	Total Calls	Left Msg.	Completed Calls	Return Calls	Call Backs
1	231	87	144	68	2
2	299	130	169	56	1
3	370	143	227	110	1
4	507	214	293	91	0
5	52	13	39	23	0
6	48	28	20	0	48
7	133	41	92	36	68
<b>JUNE TOTALS</b>	<b>1,640</b>	<b>656</b>	<b>984</b>	<b>384</b>	<b>120</b>

**Ethics Hotline  
2007 Monthly and Cumulative  
Individual Paralegal Call Statistics**

JULY					
Paralegal	Total Calls	Left Msg.	Completed Calls	Return Calls	Call Backs
1	311	127	184	72	0
2	145	66	79	35	20
3	390	165	225	102	11
4	449	173	276	78	13
5	229	80	149	65	0
6	62	38	24	0	62
7	145	69	76	13	53
<b>JULY TOTALS</b>	<b>1,731</b>	<b>718</b>	<b>1,013</b>	<b>365</b>	<b>159</b>

AUG					
Paralegal	Total Calls	Left Msg.	Completed Calls	Return Calls	Call Backs
1	314	127	187	87	9
2	229	103	126	36	10
3	382	164	218	94	10
4	530	219	311	104	11
5	358	112	246	140	0
6	0	0	0	0	0
7					
<b>AUG TOTALS</b>	<b>1,813</b>	<b>725</b>	<b>1,088</b>	<b>461</b>	<b>40</b>

Y-T-D					
Paralegal	Total Calls	Left Msg.	Completed Calls	Return Calls	Call Backs
1	2,341	887	1,454	646	22
2	2,587	1,209	1,378	484	112
3	3,060	1,218	1,842	760	22
4	3,915	1,573	2,342	784	26
5	1,607	497	1,110	673	0
6	499	299	200	1	498
7	760	383	377	58	594
<b>Y-T-D TOTALS</b>	<b>14,769</b>	<b>6,066</b>	<b>8,703</b>	<b>3,406</b>	<b>1,274</b>

**NOTE:** The entries for paralegal 6 and 7 reflect statistics for Ethics Hotline call work performed by paralegals in training.

## Professional Competence Budget Summary Authorized vs. Actual

Year-to-Date as of August 31, 2007	
<b>Budget (Actual)</b>	\$1,476,998
<b>Budget (Authorized)</b>	\$1,785,919
<b>Savings</b>	\$308,921

Monthly as of August 31, 2007						
	<u>January</u>	<u>February</u>	<u>March</u>	<u>April</u>	<u>May</u>	<u>June</u>
<b>Budget (Actual)</b>	\$160,302	\$200,448	\$166,082	\$181,163	\$159,211	\$237,306
<b>Budget (Authorized)</b>	\$177,724	\$233,911	\$271,511	\$196,572	\$212,127	\$262,429
<b>Savings</b>	\$17,422	\$33,463	\$105,429	\$15,409	\$52,916	\$25,123
	<u>July</u>	<u>August</u>	<u>September</u>	<u>October</u>	<u>November</u>	<u>December</u>
<b>Budget (Actual)</b>	\$167,115	\$205,371				
<b>Budget (Authorized)</b>	\$236,181	\$195,464				
<b>Savings</b>	\$69,066	-\$9,907	\$0	\$0	\$0	\$0

**NOTE:** In part, year-to-date savings are attributed to salary savings from vacant budgeted positions that are not filled or have not been approved for filling by the Executive Director.



# Ethics Hotline Customer Satisfaction Survey

**Thank you** for taking the Customer Satisfaction Survey. Fax completed survey to (415) 538-2171 or click the "Submit by Email" button

Please rate your satisfaction level with each of the following statements.

- 1 = very dissatisfied
- 2 = somewhat dissatisfied
- 3 = neutral
- 4 = somewhat satisfied
- 5 = very satisfied

1      2      3      4      5

- |   |                       |                       |                       |                       |                                  |
|---|-----------------------|-----------------------|-----------------------|-----------------------|----------------------------------|
| 1. Rate your overall satisfaction with the hotline experience.    | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input checked="" type="radio"/> |
| 2. How satisfied are you with the information our staff provided? | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input checked="" type="radio"/> |
| 3. How helpful was the paralegal?                                 | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input checked="" type="radio"/> |
| 4. How helpful was the receptionist?                              | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input checked="" type="radio"/> |
| 5. How satisfied are you with our system for receiving calls?     | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input checked="" type="radio"/> |
| 6. Rate your overall satisfaction with the Calbar ethics website. | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input checked="" type="radio"/> |
|   | strongly disagree     |                       |                       | strongly agree        |                                  |
| 7. I would recommend the Ethics Hotline to others.                | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input checked="" type="radio"/> |
| 8. Comments / Suggestions:  |                       |                       |                       |                       |                                  |

Name of the paralegal you spoke with (optional) LYNN

Your Name \_\_\_\_\_ Telephone \_\_\_\_\_

Address \_\_\_\_\_ 1374 Email \_\_\_\_\_

\_\_\_\_\_

**THANK YOU!**

Fax completed survey to (415) 538-2171 or click the "Submit by Email" button



# Ethics Hotline Customer Satisfaction Survey

**RECEIVED**  
By Ethics Hotline at 9:43 am, Jun 12, 2007

**Thank you** for taking the Customer Satisfaction Survey. Fax completed survey to (415) 538-2171 or click the "Submit by Email" button

Please rate your satisfaction level with each of the following statements.

- 1 = very dissatisfied
- 2 = somewhat dissatisfied
- 3 = neutral
- 4 = somewhat satisfied
- 5 = very satisfied

	1	2	3	4	5
1. Rate your overall satisfaction with the hotline experience.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
2. How satisfied are you with the information our staff provided?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
3. How helpful was the paralegal?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
4. How helpful was the receptionist?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
5. How satisfied are you with our system for receiving calls?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>
6. Rate your overall satisfaction with the Calbar ethics website.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
	strongly disagree			strongly agree	
7. I would recommend the Ethics Hotline to others.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>

8. Comments / Suggestions:

This is an invaluable resource for California lawyers. I am impressed with the friendly, efficient and helpful staff. Keep up the good work!

Dave the receptionist was super helpful

Name of the paralegal you spoke with (optional) Elbert

Your Name \_\_\_\_\_ Telephone \_\_\_\_\_

Address \_\_\_\_\_ Email d \_\_\_\_\_

**THANK YOU!**

Fax completed survey to (415) 538-2171 or click the "Submit by Email" button



# Ethics Hotline Customer Satisfaction Survey

**Thank you** for taking the Customer Satisfaction Survey. Fax completed survey to (415) 538-2171 or click the "Submit by Email" button

Please rate your satisfaction level with each of the following statements.

- 1 = very dissatisfied
- 2 = somewhat dissatisfied
- 3 = neutral
- 4 = somewhat satisfied
- 5 = very satisfied

	1	2	3	4	5
1. Rate your overall satisfaction with the hotline experience.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
2. How satisfied are you with the information our staff provided?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
3. How helpful was the paralegal?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
4. How helpful was the receptionist?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
5. How satisfied are you with our system for receiving calls?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
6. Rate your overall satisfaction with the Calbar ethics website.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
	strongly disagree			strongly agree	
7. I would recommend the Ethics Hotline to others.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
8. Comments / Suggestions:					

Elbert was extremely helpful in addressing my questions and concerns regarding the disposal of client files. In that there is no case law nor firm rules regarding such disposition, Elbert offered a host of sources to review to inform our firm's decision. After reviewing the formal opinion and Rules of Official Conduct, we were able to make a sound and viable decision. His professionalism and knowledge were exemplary. Additionally, David the receptionist was incredibly helpful and informative in anticipating my questions, alerting me as to what I could expect from the State Bar Ethics Hot Line process and affording me an excellent initial contact experience. Davis was also extremely professional, helpful and patient. Overall I had a most EXCELLENT and delicious experience and would not hesitate to call the Hot Line again and would absolutely recommend it to any other colleagues. Thank you all so very much!!!

Name of the paralegal you spoke with (optional) Elbert

Your Name \_\_\_\_\_ Telephone \_\_\_\_\_

Address \_\_\_\_\_ Email \_\_\_\_\_

**THANK YOU!**

Fax completed survey to (415) 538-2171 or click the "Submit by Email" button



# Ethics Hotline Customer Satisfaction Survey

**Thank you** for taking the Customer Satisfaction Survey. Fax completed survey to (415) 538-2171 or click the "Submit by Email" button

Please rate your satisfaction level with each of the following statements.

- 1 = very dissatisfied
- 2 = somewhat dissatisfied
- 3 = neutral
- 4 = somewhat satisfied
- 5 = very satisfied

	1	2	3	4	5
1. Rate your overall satisfaction with the hotline experience.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
2. How satisfied are you with the information our staff provided?	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
3. How helpful was the <del>paralegal</del> <i>staff attorney</i> ?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
4. How helpful was the receptionist?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>
5. How satisfied are you with our system for receiving calls?	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
6. Rate your overall satisfaction with the Calbar ethics website.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>
7. I would recommend the Ethics Hotline to others.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
8. Comments / Suggestions:					

strongly disagree

strongly agree

Our difficulty is that there is no clear guidelines for retaining civil files as they relate to minor settlements + structured settlements + annuities. The hotline was helpful to the extent possible.

Name of the ~~paralegal~~ *staff attorney* you spoke with (optional)

*Mark*

Your Name \_\_\_\_\_

Telephone \_\_\_\_\_

*8*

Address \_\_\_\_\_

Email *H* \_\_\_\_\_

**THANK YOU!**

Fax completed survey to (415) 538-2171 or click the "Submit by Email" button





# Ethics Hotline Customer Satisfaction Survey

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	1	2	3	4	5
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2. How satisfied are you with the information our staff provided?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>
3. How helpful was the paralegal?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
4. How helpful was the receptionist?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
5. How satisfied are you with our system for receiving calls?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>
6. Rate your overall satisfaction with the Calbar ethics website.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
	strongly disagree			strongly agree	
7. I would recommend the Ethics Hotline to others.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>

8. Comments / Suggestions:

I have satisfactorily used the ethics service before and knew that there is usually a day turnaround; however, on this date, I had a very serious and urgent question and was ready to just accept the standard 1 day turnaround time frame. After making my urgency known to receptionist DAVID and after hanging up, I got a call back from DAVID who had taken it upon himself to go the extra mile and try and fit me in to a more immediate response time. He did find an available paralegal (Lynn Cobb) who dealt with my issues in a measured and non-hurried fashion and having gotten as much info as one could expect, my anxieties were relieved to a great degree.

Thank you for being there when I REEEEEEEALLY needed a quick response.

Name of the paralegal you spoke with (optional) Lynn Cobb

Your Name \_\_\_\_\_ Telephone \_\_\_\_\_

Address \_\_\_\_\_ Email \_\_\_\_\_

**THANK YOU!**

Fax completed survey to (415) 538-2171 or click the "Submit by Email" button





# Ethics Hotline Customer Satisfaction Survey

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- 1 = very dissatisfied
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- 4 = somewhat satisfied
- 5 = very satisfied

	1	2	3	4	5
1. Rate your overall satisfaction with the hotline experience.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
2. How satisfied are you with the information our staff provided?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
3. How helpful was the paralegal?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
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6. Rate your overall satisfaction with the Calbar ethics website.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
	strongly disagree			strongly agree	
7. I would recommend the Ethics Hotline to others.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>

8. Comments / Suggestions:

David - Receptionist - Great! Competent & Helpful!

Ricardo - knows his stuff! A real pro!

Thanks Guys!!

Name of the paralegal you spoke with (optional) Ricardo

Your Name \_\_\_\_\_ Telephone \_\_\_\_\_

Address \_\_\_\_\_ Email \_\_\_\_\_ .com

301

**THANK YOU!**

Fax completed survey to (415) 538-2171 or click the "Subn



# Ethics Hotline Customer Satisfaction Survey

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	strongly disagree			strongly agree	
7. I would recommend the Ethics Hotline to others.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>

8. Comments / Suggestions:

Name of the paralegal you spoke with (optional)

*CYN*

Your Name \_\_\_\_\_

Phone \_\_\_\_\_

Address \_\_\_\_\_

City \_\_\_\_\_

*f*

*Z*

**THANK YOU!**

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# Ethics Hotline Customer Satisfaction Survey

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	strongly disagree			strongly agree	
7. I would recommend the Ethics Hotline to others.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>

8. Comments / Suggestions:

THANK you very much! I spoke to David Jasper and Elbert Lee this morning - Both were exceedingly helpful AND professional. David S.

Name of the paralegal you spoke with (optional) \_\_\_\_\_

Your Name \_\_\_\_\_

phone \_\_\_\_\_

Address \_\_\_\_\_

mail \_\_\_\_\_

**THANK YOU!**

Fax completed survey to (415) 538-2171 or click the "Submit by Email" button



# Ethics Hotline Customer Satisfaction Survey

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3. How helpful was the paralegal?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
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	strongly disagree			strongly agree	
7. I would recommend the Ethics Hotline to others.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
8. Comments / Suggestions:					

*NA get*

*Thanks, Pam - I'm on my way!  
Carol*

Name of the paralegal you spoke with (optional)

*Pam*

Your Name

Telephone  
 Email  
*L. D. H.*

*cdh*

THANK YOU!

For completed survey to (415) 538-2171 or click the "Submit by



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	strongly disagree			strongly agree	
7. I would recommend the Ethics Hotline to others.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
8. Comments / Suggestions:					

David Jasper was extremely polite and helpful. He is a real asset to your organization.

Name of the paralegal you spoke with (optional) Pam Hill

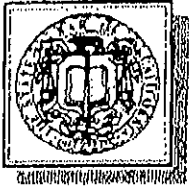
Your Name \_\_\_\_\_ Telephone \_\_\_\_\_

Address \_\_\_\_\_ Email \_\_\_\_\_

**THANK YOU!**

Fax completed survey to (415) 538-2171 or click the "Submit by Email" button





# Ethics Hotline Customer Satisfaction Survey

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3. How helpful was the paralegal?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
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	strongly disagree			strongly agree	
7. I would recommend the Ethics Hotline to others.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>

8. Comments / Suggestions:

I was enormously impressed with the service I received from david jasper. even though i called at the end of the day, he took the time to listen to my problem and asked questions which made me feel that he was actually interested in helping me. i have rarely called the ethics hotline in my many years of practice and had very limited expectations of the kind of help i would receive. to the contrary, I was treated with respect, interest and was really impressed with the help he offered me. he is a real asset to your organization.

Name of the paralegal you spoke with (optional) PAM WILL

Your Name \_\_\_\_\_ ephone \_\_\_\_\_

Address \_\_\_\_\_ mail L

# Ethics Hotline Customer Satisfaction Survey

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	strongly disagree			strongly agree	
7. I would recommend the Ethics Hotline to others.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
8. Comments / Suggestions:					

MIMI WAS VERY PROFESSIONAL AND RESEARCHED THE QUESTION / ISSUE PRESENTED IN DETAIL. HER CALL BACK WAS TIMELY, AS PROMISED, FOLLOWED BY WRITTEN ETHICS AUTHORITY ON POINT. KUDOS!

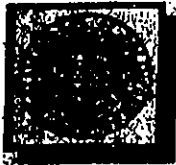
Name of the paralegal you spoke with (optional) Mimi

Your Name \_\_\_\_\_ Telephone \_\_\_\_\_

Address \_\_\_\_\_ Email \_\_\_\_\_

**THANK YOU!**

Fax completed survey to (415) 538-2171 or click the "Submit by Email" button



# Ethics Hotline Customer Satisfaction Survey

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3. How helpful was the paralegal?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
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	strongly disagree			strongly agree	
7. I would recommend the Ethics Hotline to others.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>

**B. Comments / Suggestions:**

Name of the paralegal you spoke with (optional)

*Sam*

Your Name

Telephone

Address

Email

01

124

**THANK YOU!**

Fax completed survey to (415) 538-2171 or click the "Submit b



# Ethics Hotline Customer Satisfaction Survey

**RECEIVED**  
By Ethics Hotline at 12:10 pm, Jul 27, 2007

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	strongly disagree			strongly agree	
7. I would recommend the Ethics Hotline to others.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
8. Comments / Suggestions:					

Lynn was extremely knowledgeable and helpful!

Name of the paralegal you spoke with (optional) Lynn

Your Name \_\_\_\_\_ Telephone \_\_\_\_\_

Address \_\_\_\_\_ Email \_\_\_\_\_

**THANK YOU!**

Fax completed survey to (415) 538-2171 or click the "Submit by Email" button



# Ethics Hotline Customer Satisfaction Survey

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1      2      3      4      5

- |   |                       |                       |                       |                       |                                  |
|---|-----------------------|-----------------------|-----------------------|-----------------------|----------------------------------|
| 1. Rate your overall satisfaction with the hotline experience.    | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input checked="" type="radio"/> |
| 2. How satisfied are you with the information our staff provided? | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input checked="" type="radio"/> |
| 3. How helpful was the paralegal?                                 | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input checked="" type="radio"/> |
| 4. How helpful was the receptionist?                              | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input checked="" type="radio"/> |
| 5. How satisfied are you with our system for receiving calls?     | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input checked="" type="radio"/> |
| 6. Rate your overall satisfaction with the Calbar ethics website. | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input checked="" type="radio"/> |
|   | strongly disagree     |                       |                       | strongly agree        |                                  |
| 7. I would recommend the Ethics Hotline to others.                | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input checked="" type="radio"/> |

8. Comments / Suggestions:

Receptionist David was very helpful and responsive. Information provided by Pamela Hill was very helpful. Thanks for the great service.

Name of the paralegal you spoke with (optional)

Pamela Hill

Your Name \_\_\_\_\_

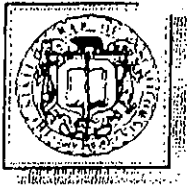
Telephone \_\_\_\_\_

Address \_\_\_\_\_

Email lfr \_\_\_\_\_

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- |   | 1                     | 2                     | 3                     | 4                     | 5                                |
|---|-----------------------|-----------------------|-----------------------|-----------------------|----------------------------------|
| 1. Rate your overall satisfaction with the hotline experience.    | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input checked="" type="radio"/> |
| 2. How satisfied are you with the information our staff provided? | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input checked="" type="radio"/> |
| 3. How helpful was the paralegal?                                 | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input checked="" type="radio"/> |
| 4. How helpful was the receptionist?                              | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input checked="" type="radio"/> |
| 5. How satisfied are you with our system for receiving calls?     | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input checked="" type="radio"/> |
| 6. Rate your overall satisfaction with the Calbar ethics website. | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input checked="" type="radio"/> |
|   | strongly disagree     |                       |                       | strongly agree        |                                  |
| 7. I would recommend the Ethics Hotline to others.                | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input checked="" type="radio"/> |

8. Comments / Suggestions:

Having never called into the hot line before, I was put immediately at ease by the receptionist, David. David was great at letting me know 'about the hot line', what to expect regarding call backs and did so with a professionalism that is often found lacking in today's business world.

Susan with whom I subsequently spoke with regarding my inquiries was also very helpful, and provided me with good information and direction.

Name of the paralegal you spoke with (optional) \_\_\_\_\_ Susan \_\_\_\_\_

Your Name \_\_\_\_\_ Telephone \_\_\_\_\_

Address \_\_\_\_\_ Email \_\_\_\_\_

**THANK YOU!**

Fax completed survey to (415) 538-2171 or click the "Subi



# ethics Hotline Customer Satisfaction Survey

**Thank you** for taking the Customer Satisfaction Survey. Fax completed survey to (415) 538-2171 or click the "Submit by Email" button

Please rate your satisfaction level with each of the following statements.

- 1 = very dissatisfied
- 2 = somewhat dissatisfied
- 3 = neutral
- 4 = somewhat satisfied
- 5 = very satisfied

	1	2	3	4	5
1. Rate your overall satisfaction with the hotline experience.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
2. How satisfied are you with the information our staff provided?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
3. How helpful was the paralegal?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
4. How helpful was the receptionist?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
5. How satisfied are you with our system for receiving calls?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
6. Rate your overall satisfaction with the Calbar ethics website.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>
	strongly disagree			strongly agree	
7. I would recommend the Ethics Hotline to others.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>

8. Comments / Suggestions:

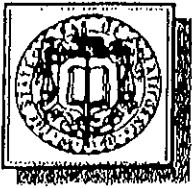
*The receptionist David and paralegal Susan were both extremely professional and helpful. I was able to gain a clear understanding of my issue after reviewing the authorities Susan provided.*

Name of the paralegal you spoke with (optional) Susan

Your Name \_\_\_\_\_ Telephone \_\_\_\_\_

Address \_\_\_\_\_ Email SI law.com





# Ethics Hotline Customer Satisfaction Survey

**Thank you** for taking the Customer Satisfaction Survey. Fax completed survey to (415) 538-2171 or click the "Submit by Email" button

Please rate your satisfaction level with each of the following statements.

- 1 = very dissatisfied
- 2 = somewhat dissatisfied
- 3 = neutral
- 4 = somewhat satisfied
- 5 = very satisfied

- |   | 1                     | 2                     | 3                     | 4                     | 5                                |
|---|-----------------------|-----------------------|-----------------------|-----------------------|----------------------------------|
| 1. Rate your overall satisfaction with the hotline experience.    | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input checked="" type="radio"/> |
| 2. How satisfied are you with the information our staff provided? | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input checked="" type="radio"/> |
| 3. How helpful was the paralegal?                                 | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input checked="" type="radio"/> |
| 4. How helpful was the receptionist?                              | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input checked="" type="radio"/> |
| 5. How satisfied are you with our system for receiving calls?     | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input checked="" type="radio"/> |
| 6. Rate your overall satisfaction with the Calbar ethics website. | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input checked="" type="radio"/> |
|   | strongly disagree     |                       |                       | strongly agree        |                                  |
| 7. I would recommend the Ethics Hotline to others.                | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input checked="" type="radio"/> |

8. Comments / Suggestions:

The receptionist, David, was helpful and intuitive with understanding the special needs of my request

Name of the paralegal you spoke with (optional) \_\_\_\_\_

Your Name \_\_\_\_\_ Telephone \_\_\_\_\_

Address \_\_\_\_\_ Email \_\_\_\_\_

**THANK YOU!**

Fax completed survey to (415) 538-2171 or click the "Submit by Email" button





# Ethics Hotline Customer Satisfaction Survey

RECEIVED  
By Ethics Hotline at 2:02 pm, Aug 28, 2007

**Thank you** for taking the Customer Satisfaction Survey. Fax completed survey to (415) 538-2171 or click the "Submit by Email" button.

Please rate your satisfaction level with each of the following statements.

- 1 = very dissatisfied
- 2 = somewhat dissatisfied
- 3 = neutral
- 4 = somewhat satisfied
- 5 = very satisfied

	1	2	3	4	5
1. Rate your overall satisfaction with the hotline experience.	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
2. How satisfied are you with the information our staff provided?	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
3. How helpful was the paralegal?	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
4. How helpful was the receptionist?	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
5. How satisfied are you with our system for receiving calls?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
6. Rate your overall satisfaction with the Calbar ethics website.	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
	strongly disagree			strongly agree	
7. I would recommend the Ethics Hotline to others.	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

8. Comments / Suggestions:

The way this system works, enables unethical law firms to continue their ways of practice without accountability. The paralegal that tried to help sounded meek and was uninformative. There is a difference between assisting someone and giving legal advice, she was unable to make that determination in my opinion. Because of this service another valid complaint will go unaddressed and enable this particular law firm to continue to over bill clients. Hence, there are currently two (2) matters under investigation for the same firm's unethical over billing practice. It is a shame that such a system hinders the public or employees of such firms to make valid complaints because of the incompetence of others.

Name of the paralegal you spoke with (optional) \_\_\_\_\_

Your Name \_\_\_\_\_ Telephone \_\_\_\_\_

Address \_\_\_\_\_ Email \_\_\_\_\_

**THANK YOU!**

Fax completed survey to (415) 538-2171 or click the "Sul

*Law Offices of*

\*Member of the California State Bar  
\*\*Case Analyst

June 22, 2007

Lauren Mc Currey  
The State Bar Of California  
180 Howard Street  
San Francisco, CA 94105

Re: Outstanding Attorney Ethics Hotline Service

Dear Ms. Mc Currey,

For the first time in my 17 year legal career, I called the California State Bar Ethics Hotline on June 22, 2007, to discuss a number of complex ethical issues. My call was handled by Ricardo Patino.

I am writing to tell you that I was totally impressed with Mr. Patino. His handling of the issues raised, and his knowledge of the relevant Rules of Professional Conduct, including case decisions, was remarkable and outstanding. He handled my call and questions with courtesy, thoroughness, and the utmost professionalism and competence.

Please convey my thanks and appreciation to Mr. Patino for his fine work. It is a great benefit to know the great value the Ethics Hotline provides.

Thank you for the fine services you provide.