



**THE STATE BAR
OF CALIFORNIA**

180 HOWARD STREET, SAN FRANCISCO, CA 94105-1639

**OFFICE OF PROFESSIONAL COMPETENCE,
PLANNING & DEVELOPMENT**

TELEPHONE: (415) 538-2116

MEMORANDUM

DATE: February 19, 2009
TO: Members of the Board's Regulation, Admissions & Discipline Oversight Committee
FROM: Randall Difuntorum, Director, Professional Competence Programs
SUBJECT: RAD Meeting on March 5, 2009 – Status of the Professional Competence Unit

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This memorandum provides a 2008 year-end report 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 vs. Actuals. Board members with questions may contact me at (415) 538-2161 or Lauren McCurdy at (415) 538-2107.

1. ETHICS HOTLINE

- In 2008, 21,467 member inquiries were received with a completion rate of 85%. This completion rate includes distribution of 670 copies of published ethics opinions and other written materials requested by inquirers and 5,983 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, 1,514 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.
- In 2008, 24 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. The surveys received give the Hotline solid marks in each survey category. (Copies of those surveys received between October and December of 2008, since the last report to RAD, are attached.)

2. COPRAC

- Since the last Professional Competence status report submitted for the Board Committee's November 10, 2008 meeting, COPRAC met on November 14, 2008 in Los Angeles, and January 16, 2009 in San Francisco.
- At its November 10, 2008 meeting, COPRAC considered public comments received on proposed formal opinion Interim No. 98-0001 (re offers of settlement conditioned on a client's waiver of statutory right to seek attorney's fees). COPRAC approved the opinion for submission to RAD as revised in response to the public comments. To receive oral comments on proposed formal opinions Interim No. 06-0001 (re duties in enforcing charging liens) and Interim No. 06-0006 (re fee disputes and Civ. Code Sec. 1542 waivers), a special open session was scheduled for November 10th meeting. COPRAC also considered four new topics for possible formal opinions. COPRAC's proposed formal opinion Interim No. 05-0001 (re modification of fee agreements) is on RAD's March 5th agenda as open action item III.E and it is anticipated that COPRAC's advisor/immediate past chair, Dennis Maio, will represent COPRAC on this item.
- At its January 16, 2009 meeting, COPRAC considered the topic of lawyer involvement with non-lawyers in rendering mortgage loan modification services. COPRAC determined to develop an ethics alert article on this topic. The article was recently published on the State Bar website in the Ethics Information area. (<http://calbar.ca.gov/calbar/pdfs/ethics/Ethics-Alert-Foreclosure.pdf>) COPRAC also considered a proposed comment letter to the California Law Revision Commission concerning that Commission's tentative recommendation on Evidence Code amendments on survival of the attorney-client privilege.
- The following proposed formal opinion circulated for a 90-day public comment period that ended on February 3, 2009. The comments received will be considered at the February 27th meeting of COPRAC.

Formal Opinion Interim No. 06-0006

ISSUES: Is it ethically proper for an attorney who is settling a fee dispute with a client to include a general release and a Civil Code section 1542 waiver in the settlement agreement? Does the existence of a legal malpractice claim against the attorney alter the ethical propriety of including a general release and section 1542 waiver in the settlement agreement?

DIGEST: If an attorney contemplates entering into a settlement agreement with a current client that includes a general release of a legal malpractice claim or pursues a settlement agreement with a client, the terms of which are broad enough to release a legal malpractice claim, the attorney must promptly disclose to the client the facts giving rise to the legal malpractice claim. The attorney must consider whether it is necessary or appropriate to withdraw from the representation. If the attorney does not withdraw, the attorney must:

1. Comply with rule 3-400(B) by advising the client of the right to seek independent counsel and giving the client an opportunity to do so;

2. Advise the client that the lawyer is not representing or advising the client as to the settlement of the fee dispute or the legal malpractice claim; and
3. Fully disclose to the client the terms of the settlement agreement, in writing, including the possible effect of the general release and section 1542 waiver, unless the client is represented by independent counsel.

→ COPRAC's next meeting is scheduled for February 27, 2009 and will be held at the Los Angeles State Bar office.

3. RULES REVISION COMMISSION

→ Since the last Professional Competence status report submitted for the Board Committee's November 10, 2008 meeting, the Commission met on December 12, 2008 in San Francisco and January 16, 2009 in Los Angeles. Visitors at the open session of these meetings included: Jeffrey Tidus (COPRAC liaison); Diane Karpman (Beverly Hills Bar Association liaison); Governor Michael Marcus; Governor Howard Miller; and Donald Steedman and Russell Weiner of the Office of the Chief Trial Counsel. The Commission's next meeting is scheduled for February 20, 2009 and will be held at the San Francisco State Bar office.

→ Among the items on the agenda for the Commission's February 20th meeting are the following proposed new or amended rules: Rule 1.8.6 (payments not from clients); Rule 3.3 (trial conduct); Rule 3.6 (trial publicity); Rule 5-210 (member as witness); and Rule 6.3 (membership in legal services organization). New Commission procedures require that all assigned rule drafts be submitted in the form of a comparison table showing changes to any comparable ABA Model Rule.

→ At the Board's January 10, 2009 planning meeting, the Commission presented a special report on selected rule comparisons with the ABA Model Rules. The Commission's representatives answered Board member questions about the Commission's proposed rules and specific deviations from comparable ABA Model Rules. The Board also discussed the Commission's charge and the guidance afforded on issue of conformance to the ABA Model Rules. Following discussion, the State Bar President assigned a new Board Subcommittee to review the Commission's charge and to report back with any recommendations for clarifications or changes. After the Board's meeting, the Commission sent a February 3, 2008 memorandum to the Board Subcommittee raising a specific issue to consider relating to the style manual that the Commission has been asked to use in drafting proposed rule language. A status report from the Board Subcommittee is on RAD's March 5th agenda as open report item V.A. and Commission staff will be present to observe the Subcommittee's presentation for a report back to the Commission at its March 27, 2008 meeting.

→ The Commission has begun preparations to present a panel at the 2009 Annual Statewide Ethics Symposium. The Symposium is scheduled to be held in San Diego on May 2, 2009.

4. COMPETENCE PUBLICATIONS

→ Handbook on Client Trust Accounting for CA Attorneys:
In 2008, 52 copies have been sold. The online version of the handbook posted at the Bar's website was downloaded 164,178 times.

- California Compendium on Professional Responsibility:
In 2008, 251 copies of the Compendium updates were sold. The production of the 2009 Compendium update is due to be completed by the 2nd quarter of 2009.
- CA Rules of Professional Conduct & State Bar (a.k.a Publication No. 250):
In 2008, 1,792 copies of the 2008 Publication 250 were sold and an online PDF version of the Rules of Professional Conduct posted at the Bar's website was downloaded 20,504 times.

5. COMPETENCE RESOURCES AT CALBAR.CA.GOV

- The State Bar tracks the web activity for all website pages accessed. The chart below lists selected web pages administered by Professional Competence and the 2008 activity in terms of downloads and visits (a.k.a. "hits").

2008 Professional Competence Web Resources – Activity Detail	
Webpage	Number of Downloads/Visits
Trust Accounting Handbook pdf	164,178 downloads
COPRAC pages	38,847 visits
Rules of Professional Conduct html pages	65,372 visits
The State Bar Act html pages	137,624 visits
Ethics Hotline html pages	26,345 visits
Ethics Opinions html pages	61,938 visits
2008 California Rules of Professional Conduct pdf	20,504 downloads

- COPRAC's ethics alert on lawyer involvement with non-lawyers in rendering mortgage loan modification services was posted at homepage of Bar's website, and Hotliner News (online newsletter) Featured Articles page of the website.
- Updated copy of the *Handbook on Client Trust Accounting for California Attorneys* was posted at the Bar's website.
- The meeting materials for the Rules Revision Commission's December, January & February meetings were posted at the Commission's Meeting Materials page of the website.

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

Professional Competence Staff List

Professional Competence Staff Positions as of December 31, 2008	
Number of Positions Authorized	14.5
Number of Positions Filled	13.5

Professional Competence Employees as of December 31, 2008	
	Grade & Classification
	56EA – Director
VACANT	17A – Sr. Attorney
	16A – Attorney
	40C – Sr. Administrative Specialist
	9 – Program/Court Systems Analyst (P/CSA)
	8 - Sr. Administrative Assistant
	8 – Paralegal
	8 – Paralegal
	8 – Paralegal
	8 – Paralegal
	8 – Paralegal
	8 – Paralegal
VACANT (hiring decision pending)	8 – Paralegal
	6 – Administrative Secretary
	4 – Data Analyst II
<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 - 2008

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	1241	1036	205	83%	17%	51	456
February	19	1092	857	235	78%	22%	33	445
March	20	1224	1041	183	85%	15%	68	486
April	22	1377	1139	238	83%	17%	78	558
May	21	1240	1024	216	83%	17%	59	482
June	21	1162	1010	152	87%	13%	52	538
July	22	1284	1160	124	90%	10%	79	568
August	21	1195	998	197	84%	16%	44	508
September	21	1256	1129	127	90%	10%	53	539
October	22	1288	1138	150	88%	12%	52	565
November	17	1017	875	142	86%	14%	59	417
December	22	1104	917	187	83%	17%	42	421
Cumulative Totals	249	14,480	12,324	2,156	85%	15%	670	5,983

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 December 31, 2008)

Daily: Incoming Calls: 58
Completed Calls: 49

Monthly: Incoming Calls: 1,207
Completed Calls: 1,027

Aggregate Outgoing Calls

Current Month: 1,741

Cumulative to Date: 21,467

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
2008 Monthly and Cumulative
Individual Paralegal Call Statistics**

JAN					
Paralegal	Total Calls	Left Msg.	Completed Calls	Return Calls	Call Backs
1	222	100	122	76	0
2	241	98	143	47	0
3	379	151	228	74	0
4	508	240	268	84	0
5	227	55	172	110	0
6	39	18	21	0	30
JAN TOTALS	1,616	662	954	391	30

FEB					
Paralegal	Total Calls	Left Msg.	Completed Calls	Return Calls	Call Backs
1	226	82	144	78	0
2	229	89	140	49	0
3	397	154	243	85	0
4	488	216	272	78	0
5	206	75	131	80	0
6	25	14	11	8	5
FEB TOTALS	1,571	630	941	378	5

MAR					
Paralegal	Total Calls	Left Msg.	Completed Calls	Return Calls	Call Backs
1	316	125	191	111	0
2	0	0	0	0	0
3	546	243	303	94	0
4	530	229	301	94	0
5	304	101	203	131	0
6	13	8	5	0	13
MAR TOTALS	1,709	706	1,003	430	13

APR					
Paralegal	Total Calls	Left Msg.	Completed Calls	Return Calls	Call Backs
1	355	140	215	111	22
2	12	5	7	1	0
3	457	176	281	103	1
4	663	283	380	121	0
5	374	128	246	127	0
6	16	7	9	5	0
7	55	32	23	0	55
APR TOTALS	1,932	771	1,161	468	78

MAY					
Paralegal	Total Calls	Left Msg.	Completed Calls	Return Calls	Call Backs
1	276	95	181	112	0
2	205	97	108	18	0
3	214	77	137	53	0
4	568	244	324	101	0
5	344	124	220	101	0
6	5	1	4	0	5
7			0		
MAY TOTALS	1,612	638	974	385	5

JUNE					
Paralegal	Total Calls	Left Msg.	Completed Calls	Return Calls	Call Backs
1	288	98	190	106	0
2	230	93	137	26	0
3	293	104	189	97	0
4	529	231	298	96	10
5	269	83	186	103	0
6	104	64	40	3	101
7			0		
JUNE TOTALS	1,713	673	1,040	431	111

**Ethics Hotline
2008 Monthly and Cumulative
Individual Paralegal Call Statistics**

JULY					
Paralegal	Total Calls	Left Msg.	Completed Calls	Return Calls	Call Backs
1	151	45	106	68	0
2	419	199	220	63	4
3	322	115	207	106	0
4	559	257	302	111	0
5	339	106	233	140	0
6	254	164	90	8	243
7	26	16	10	0	26
JULY TOTALS	2,070	902	1,168	496	273

AUG					
Paralegal	Total Calls	Left Msg.	Completed Calls	Return Calls	Call Backs
1	257	98	159	98	0
2	411	198	213	59	0
3	355	122	233	104	0
4	426	163	263	98	0
5	297	99	198	119	0
6	228	150	78	4	207
7	0	0	0	0	0
AUG TOTALS	1,974	830	1,144	482	207

SEPT					
Paralegal	Total Calls	Left Msg.	Completed Calls	Return Calls	Call Backs
1	250	90	160	89	1
2	270	118	152	43	0
3	289	90	199	95	0
4	518	207	311	82	0
5	354	118	236	105	0
6	152	104	48	2	150
7	0	0	0	0	0
SEPT TOTALS	1,833	727	1,106	416	151

OCT					
Paralegal	Total Calls	Left Msg.	Completed Calls	Return Calls	Call Backs
1	111	45	66	38	0
2	430	225	205	75	0
3	391	130	261	125	0
4	552	235	317	101	1
5	281	91	190	105	0
6	292	171	121	6	268
7	0	0	0	0	0
OCT TOTALS	2,057	897	1,160	450	269

NOV					
Paralegal	Total Calls	Left Msg.	Completed Calls	Return Calls	Call Backs
1	0	0	0	0	0
2	222	103	119	40	0
3	366	126	240	119	0
4	502	230	272	92	0
5	332	125	207	101	0
6	208	132	76	2	175
7	9	3	6	0	0
NOV TOTALS	1,639	719	920	354	175

DEC					
Paralegal	Total Calls	Left Msg.	Completed Calls	Return Calls	Call Backs
1	0	0	0	0	0
2	319	142	177	69	0
3	435	150	285	148	0
4	524	248	276	95	1
5	252	99	153	73	0
6	196	137	59	0	196
7	15	1	14	2	0
DEC TOTALS	1,741	777	964	387	197

Y-T-D					
Paralegal	Total Calls	Left Msg.	Completed Calls	Return Calls	Call Backs
1	2,452	918	1,534	887	23
2	2,988	1,367	1,621	490	4
3	4,444	1,638	2,806	1,203	1
4	6,367	2,783	3,584	1,153	12
5	3,579	1,204	2,375	1,295	0
6	1,532	970	562	38	1,393
7	105	52	53	2	81
Y-T-D TOTALS	21,467	8,932	12,535	5,068	1,514

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 December 31, 2008	
Budget (Actual)	\$2,248,639
Budget (Authorized)	\$2,657,379
Savings	\$408,740

Monthly as of December 31, 2008							
	<u>January</u>	<u>February</u>	<u>March</u>	<u>April</u>	<u>May</u>	<u>June</u>	
Budget (Actual)	\$151,353	\$185,468	\$201,991	\$183,615	\$220,237	\$224,069	
Budget (Authorized)	\$204,141	\$205,110	\$228,931	\$205,936	\$264,213	\$206,232	
Savings	\$52,788	\$19,642	\$26,940	\$22,321	\$43,976	-\$17,837	
	<u>July</u>	<u>August</u>	<u>September</u>	<u>October</u>	<u>November</u>	<u>December</u>	
Budget (Actual)	\$179,322	\$168,127	\$164,589	\$241,095	\$165,930	\$162,843	
Budget (Authorized)	\$209,436	\$209,717	\$209,747	\$270,021	\$210,126	\$233,769	
Savings	\$30,114	\$41,590	\$45,158	\$28,926	\$44,196	\$70,926	

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



We thank you for calling the Ethics Hotline and welcome any comments and suggestions that you may have.
Fax completed surveys to: (415) 538-2171 or click "Submit" at the end of this form.

Please choose the best answer for each question.

(1) (2) (3) (4) (5)

- Rate overall satisfaction with the hotline experience Very Dissatisfied Dissatisfied Neutral Satisfied Very Satisfied
- How satisfied are you with the information our staff provided? Very Dissatisfied Dissatisfied Neutral Satisfied Very Satisfied
- How helpful was the ethics research paralegal? Very Dissatisfied Dissatisfied Neutral Satisfied Very Satisfied
- How helpful was the receptionist? Very Dissatisfied Dissatisfied Neutral Satisfied Very Satisfied
- How satisfied are you with our system for receiving calls? Very Dissatisfied Dissatisfied Neutral Satisfied Very Satisfied
- Rate your overall satisfaction with the State Bar website. Very Dissatisfied Dissatisfied Neutral Satisfied Very Satisfied
- I would recommend this service to others. Strongly Disagree Disagree Neutral Agree Strongly Agree

COMMENTS/SUGGESTIONS:

They did a good job!
David the receptionist was also very helpful!

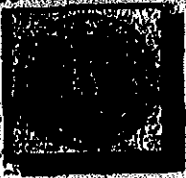
Paralegal you spoke with (optional)

Pam Hill

Call Date

12/17/2008





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)

Jan

Your Name _____

Address _____

Telephone _____

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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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 checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
2. How satisfied are you with the information our staff provided?	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
3. How helpful was the paralegal?	<input type="radio"/>	<input checked="" 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 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 checked="" type="radio"/>	<input 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 checked="" type="radio"/>	<input type="radio"/>
8. Comments / Suggestions:					

Name of the paralegal you spoke with (optional) Lynn

Your Name _____ phone _____

Address _____ il _____

THANK YOU!

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

RECEIVED ON: 11/21/08

Ethics Hotline Customer Satisfaction Survey



We thank you for calling the Ethics Hotline and welcome any comments and suggestions that you may have.
Fax completed surveys to: (415) 538-2171 or click "Submit" at the end of this form.

Please choose the best answer for each question.

	(1)	(2)	(3)	(4)	(5)
Rate overall satisfaction with the hotline experience	<input type="radio"/> Very Dissatisfied	<input type="radio"/> Dissatisfied	<input type="radio"/> Neutral	<input type="radio"/> Satisfied	<input checked="" type="radio"/> Very Satisfied
How satisfied are you with the information our staff provided?	<input type="radio"/> Very Dissatisfied	<input type="radio"/> Dissatisfied	<input type="radio"/> Neutral	<input type="radio"/> Satisfied	<input checked="" type="radio"/> Very Satisfied
How helpful was the ethics research paralegal?	<input type="radio"/> Very Dissatisfied	<input type="radio"/> Dissatisfied	<input type="radio"/> Neutral	<input type="radio"/> Satisfied	<input checked="" type="radio"/> Very Satisfied
How helpful was the receptionist?	<input type="radio"/> Very Dissatisfied	<input type="radio"/> Dissatisfied	<input type="radio"/> Neutral	<input type="radio"/> Satisfied	<input checked="" type="radio"/> Very Satisfied
How satisfied are you with our system for receiving calls?	<input type="radio"/> Very Dissatisfied	<input type="radio"/> Dissatisfied	<input type="radio"/> Neutral	<input type="radio"/> Satisfied	<input checked="" type="radio"/> Very Satisfied
Rate your overall satisfaction with the State Bar website.	<input type="radio"/> Very Dissatisfied	<input type="radio"/> Dissatisfied	<input type="radio"/> Neutral	<input type="radio"/> Satisfied	<input checked="" type="radio"/> Very Satisfied
I would recommend this service to others.	<input type="radio"/> Strongly Disagree	<input type="radio"/> Disagree	<input type="radio"/> Neutral	<input type="radio"/> Agree	<input checked="" type="radio"/> Strongly Agree

COMMENTS/SUGGESTIONS:

In the past almost 20 years, I have always received exceptional information that has been extremely useful in the matters for which I have called.

Paralegal you spoke with (optional)

Ricardo Patino

Call Date

11/21/2008



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back rece



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
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- 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 checked="" type="radio"/>	<input type="radio"/>
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 checked="" 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 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 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:

Name of the paralegal you spoke with (optional) Lynn

Your Name _____ telephone _____

Address _____ mail _____

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



RECEIVED ON: 10/09/08

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 checked="" type="radio"/>	<input type="radio"/>
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 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:

As to questions 1 and 2, I gave a 4 rather than 5 rating only because, despite her best efforts, the paralegal was unable to provide definitive information in response to my questions. She did encourage me to provide comment/input on the ambiguous language of Rule 1-311 which we were discussing.

Name of the paralegal you spoke with (optional) _____ She didn't say _____

Your Name _____ Telephone _____

Address _____ Email _____

OUI

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 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 checked="" 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 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:					

Name of the paralegal you spoke with (optional) Lynn

Your Name _____ Telephone _____

Address _____ Email _____