



MEMORANDUM

DATE: October 28, 2009
TO: Members of the Board's Regulation & Admissions Oversight Committee
FROM: Randall Difuntorum, Director, Professional Competence Programs
SUBJECT: RAC Meeting on November 12, 2009 – Status of the Professional Competence Unit

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This memorandum provides an update on the activities of the Professional Competence Unit through August 2009. 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

- As of August 31, 2009, 10,734 member inquiries were received with a completion rate of 85%. This completion rate includes distribution of 403 copies of published ethics opinions and other written materials requested by inquirers and 4,625 referrals to information posted at the Bar's website. (Due to the availability of State Bar Formal Opinions at the Ethics Information area of the website, there is a decreasing need for distribution of this information by mail.) Of the total calls, 839 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 received instructions on how to call-in and receive priority handling when they choose to return the Hotline's call at their convenience. However, when no return call is received, the Hotline initiates a courtesy follow-up call.
- For the period of June 1, 2009 through August 31, 2009, 11 voluntary satisfaction surveys and one thank you note 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. Nearly all of the surveys received gave the Hotline the highest possible marks in each survey category. One survey indicated dissatisfaction based on their experience with the response time. (Copies of the surveys and thank you note received are attached.)
- For the eighth year running, the Professional Competence office sponsored an exhibit booth at the State Bar Annual Meeting in San Diego. Each year this exhibit booth features the Ethics Hotline program and other professional

competence resources administered by Professional Competence staff. 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 professional responsibility computer 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 benefit. To publicize the Ethics Hotline toll-free telephone number and the Ethics Information page at the State Bar website, over 250 free promotional items were distributed. In addition, approximately 150 copies of a comprehensive Ethics Resources CD-Rom were sold for \$1.00 each, and 200 copies of a 2009 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 16, 2009 meeting, COPRAC met on July 10th in Los Angeles and September 10th at the Annual Meeting in San Diego. COPRAC's annual new member appointment recommendations were considered and approved at the Board's July meeting. At the September meeting COPRAC considered and finalized 7 letters of comment on proposed new and amended rules for submission to the Rules Revision Commission.
- The following opinions passed the 30-day RAD approval period and were published at the Bar's website on July 16, 2009 and October 5, 2009, respectively:

Formal Opinion No. 2009-177 (Formerly Interim Opn. No. 06-0001):

ISSUE: In what manner may an attorney maintain her rights in a charging lien when her former client demands that the attorney endorse a settlement check jointly payable to the client and his current and former attorneys without violating the requirement of rule 4-100 of the California Rules of Professional Conduct that the attorney promptly pay or deliver funds to which the client is entitled?

DIGEST: When responding to a request to endorse a settlement check made jointly payable to a client and his or her current and former attorneys where the former attorney has asserted a valid lien on the settlement proceeds, the former attorney must take prompt steps to find a reasonable method or methods of delivering the undisputed portion of the proceeds to which the client is entitled. The former attorney does not violate rule 4-100 by refusing to use a method that would extinguish the attorney's charging lien, but has a duty to consult governing legal authorities and make a reasonable determination of the amount to which he or she is entitled under the circumstances. If the client does not agree to proposed reasonable methods for delivering the undisputed portion or does not agree with the former attorney's determination of the amount of the proceeds that undisputedly belong to the client, the attorney must promptly seek resolution of the fee dispute through arbitration or judicial determination, as appropriate.

Formal Opinion No. 2009-178 (Formerly Interim Opn. 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: An attorney must promptly disclose to the client the facts giving rise to any legal malpractice claim against the attorney. When an attorney contemplates entering into a settlement agreement with a current client that would limit the attorney's liability to the client for the lawyer's professional malpractice, 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 regarding the settlement 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 provisions limiting the lawyer's liability to the client, unless the client is represented by independent counsel.

→ The following opinion was tentatively approved by COPRAC for a 90-day public comment circulation and has been posted at the public comment page of the Bar's website:

Formal Opinion Interim No. 08-0002 (comment deadline: February 4, 2009):

ISSUES: Does an attorney violate the duties of confidentiality and competence he or she owes to a client by: 1) using a computer to which the organization employing the attorney and its supervisors have access; 2) using computer software to which the software developer has access; or 3) using a public or home wireless connection?

DIGEST: To comply with his or her duties of confidentiality and competence, an attorney must take appropriate steps to evaluate: 1) the level of security attendant to the use of a particular technology in the course of representing a client; 2) the legal ramifications to a third party who intercepts, accesses or exceeds authorized use of the electronic information; 3) the degree of sensitivity of the information; 4) the possible impact on the client of an inadvertent disclosure of privileged or confidential information or work product; and 5) whether reasonable precautions may be taken when using the technology to increase the level of security. With regard to use of a computer to which the organization employing the attorney and its supervisors have access, the attorney must consider the purpose of, and limitations on, the access and whether the organization itself or an individual with access may have an interest in the information that is in conflict with the client's interest. The attorney may need to take

precautions to ensure that any interested persons will not be able to access the information or, absent informed client consent, the attorney may need to consider whether he or she can competently represent the client without using the computer in connection with the representation. With regard to access to confidential information by a software developer, the attorney may use the software as long as the attorney does not have a reason to believe the information will be used improperly. However, he or she may need to discuss the issue with the client to determine appropriate methods of proceeding if the information at issue is highly sensitive or the software developer has an adverse interest in the matter. With regard to use of a public or home wireless connection, the attorney risks violating his or her duties of confidentiality and competence unless appropriate precautions are taken, such as using an adequate encryption device and a personal firewall. Depending on the situation, including if the information at issue is of a highly sensitive nature, the attorney may need to avoid using the wireless connection entirely, or notify the client of possible risks associated with use of the wireless connection and seek the client's informed consent to do so. Generally, the attorney should not use an unsecured public wireless connection that does not require a password for access.

- COPRAC conducted four educational programs at the State Bar Annual Meeting held in San Diego. The COPRAC sponsored programs were entitled "Conflicts for Lawyers: How to Get Yourself Disqualified, Sued and Disciplined," "Ethics Update 2009: Significant Developments in the Law of Lawyering," "How to Avoid Involuntary Pro Bono Work: Forming the Attorney-Client Relationship and Collecting Attorneys Fees," and "Other People's Money: An Overview of Client Trust Accounting." The Office of Professional Competence also sponsored two additional programs. The first program was entitled "Legal Ethics in the Global Digital Age," moderated by former RAD co-chair Judy Gilbert; Commission Consultant, Kevin Mohr, former COPRAC member Willis Baughman; and former San Diego County Bar Ethics Committee chair, Heather Rosing. This program was selected by Annual Meeting staff for a video webcast permitting online attendees. The second program, entitled "Legal Jeopardy," was co-sponsored by the San Diego Chapter of the American Inn's of Court. A summary of the program evaluation forms for these programs will be provided with the next RAC status report.
- COPRAC's next meeting is scheduled for October 30, 2009 and will be held in Los Angeles. In addition, on October 29th, a new member orientation meeting will be held to orient the incoming COPRAC members.

3. RULES REVISION COMMISSION

- Since the last Professional Competence status report submitted for the Board Committee's July 16, 2009 meeting, the Commission met on July 24 & 25 in San Francisco, August 28 & 29 by video-conference, September 11 at the Annual Meeting in San Diego, and October 16 & 17 by video-conference. The Commission project is proceeding as scheduled and the Board's role in adopting the proposed rules begins at the November Board meetings. The Board will consider the adoption of the proposed rules previously distributed as the Commission's Batches 1, 2, and 3 proposals (refer to Open Board Agenda Item NOV. 132).

- The public comment period for the Commission's Batch 4 proposed rules ended on October 23, 2009 and the Commission will consider revisions to those rules in response to the public comments at its December 11 & 12, 2009 meeting.
- On September 12, 2009, the Board Committee on Regulations and Admissions (RAC) held its first meeting and authorized the circulation of 11 proposed new and amended rules as the Commission's Batch 5 proposals for a 60-day public comment period that will end on November 13, 2009. A public hearing to receive testimony on the Batch 5 proposals is scheduled for November 10, 2009 at the State Bar's Office in San Francisco. Members of the Board are welcomed to attend the public hearing.
- The Commission's next meetings are scheduled for November 6 & 7 in Los Angeles and December 11 & 12 in San Francisco.
- On July 29, 2009 the Supreme Court approved Rule 1-650 (Limited Legal Services Programs), operative August 28, 2009. On August 26, 2009 the Supreme Court approved Rule 3-410 (Disclosure of Professional Liability Insurance) operative January 1, 2010.

4. COMPETENCE PUBLICATIONS

- Handbook on Client Trust Accounting for CA Attorneys:
The online version of the handbook has been downloaded 109,169 times, year-to-date. A revised 2009 online version of the handbook was posted at the Bar's website in June. This edition marks the conversion from the former WordPerfect document to the new Word document. The 2006 hard copy edition has been out-of-print since March 2009.
- California Compendium on Professional Responsibility:
As of August 31, 2009, 371 copies of the Compendium updates were sold. Sales of the 2009 Compendium update are set to begin in late October. The online version of the Compendium index has been downloaded 83,166 times, year-to-date.
- CA Rules of Professional Conduct & State Bar (a.k.a Publication No. 250):
As of August 31, 2009, 995 copies of the 2009 Publication 250 were sold and an online PDF version of the Rules of Professional Conduct posted at the Bar's website has been downloaded 84,789 times, year-to-date.

5. COMPETENCE RESOURCES AT CALBAR.CA.GOV

- Newly approved Rule 1-650 (Limited Legal Services Programs) and Rule 3-410 (Disclosure of Professional Liability Insurance) were posted at the State Bar Rules and related pages of the Bar's website.
- The meeting materials for the Rules Revision Commission's July 24 & 25, August 28 & 29, and October 16 & 17 meetings were posted at the Commission's Meeting Materials page of the website.
- Public Comment Discussion Drafts for the Rules Revision Commission's Batch 4 and Batch 5 proposed new and amended Rules of Professional Conduct were posted at the Public Comment page of the Bar's website.

- A public hearing notice for the September 12, 2009 hearing in San Diego on the Batch 4 rules, and the November 10, 2009 hearing in San Francisco on the Batch 5 rules, was posted at the Commission's homepage of the Bar's website.
- COPRAC's recent ethics alert entitled: "Legal Services to Distressed Homeowners and Foreclosure Consultants on Loan Modifications" posted at the Bar's website has been downloaded 96,365 times, year-to-date.
- COPRAC's Formal Opinion 2009-177 (Ethical Obligations in Enforcing Charging Liens) and Formal Opinion 2009-178 (Inclusion of Civil Code §1542 Waiver in the Settlement of a Fee Dispute with a Client) were posted at the Ethics Opinion page of the website. Formal Opinion Interim No. 08-0002 was posted at the Public Comment page of the Bar's website.

cc:

Robert A. Hawley

Professional Competence Staff List

Professional Competence Staff Positions as of August 31, 2009	
Number of Positions Authorized	14.5
Number of Positions Filled	13.5

Professional Competence Employees as of August 31, 2009	
	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
	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 - 2009

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	20	1386	1155	231	83%	17%	53	588
February	18	1314	1134	180	86%	14%	51	578
March	21	1471	1247	224	85%	15%	45	647
April	22	1406	1175	231	84%	16%	54	661
May	20	1273	1085	188	85%	15%	39	580
June	22	1342	1137	205	85%	15%	56	579
July	22	1309	1116	193	85%	15%	58	511
August	21	1233	1096	137	89%	11%	47	481
Cumulative Totals	166	10,734	9,145	1,589	85%	15%	403	4,625

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, 2009)

Daily: Incoming Calls: 65
Completed Calls: 55

Monthly: Incoming Calls: 1,342
Completed Calls: 1,143

Aggregate Outgoing Calls

Current Month: 1,812

Cumulative to Date: 15,848

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
2009 Monthly and Cumulative
Individual Paralegal Call Statistics**

JAN					
Paralegal	Total Calls	Left Msg.	Completed Calls	Return Calls	Call Backs
1	276	80	196	111	1
2	375	183	192	63	0
3	416	157	259	117	0
4	488	225	263	103	0
5	319	118	201	100	0
6	217	136	81	3	190
JAN TOTALS	2,091	899	1,192	497	191

FEB					
Paralegal	Total Calls	Left Msg.	Completed Calls	Return Calls	Call Backs
1	245	87	158	85	0
2	324	142	182	63	0
3	429	173	256	95	7
4	550	255	295	101	0
5	291	95	196	110	0
6	119	48	71	4	76
FEB TOTALS	1,958	800	1,158	458	83

MAR					
Paralegal	Total Calls	Left Msg.	Completed Calls	Return Calls	Call Backs
1	308	107	201	90	0
2	362	181	181	60	0
3	441	153	288	134	0
4	567	248	319	105	0
5	350	133	217	118	0
6	101	56	45	4	67
MAR TOTALS	2,129	878	1,251	511	67

APR					
Paralegal	Total Calls	Left Msg.	Completed Calls	Return Calls	Call Backs
1	316	114	202	96	5
2	407	192	215	63	5
3	196	75	121	65	5
4	570	233	337	117	5
5	318	113	205	128	0
6	202	95	107	14	35
APR TOTALS	2,009	822	1,187	483	55

MAY					
Paralegal	Total Calls	Left Msg.	Completed Calls	Return Calls	Call Backs
1	300	99	201	97	20
2	419	212	207	50	6
3	294	102	192	90	13
4	458	194	264	91	11
5	266	86	180	95	10
6	102	43	59	20	17
MAY TOTALS	1,839	736	1,103	443	77

JUN					
Paralegal	Total Calls	Left Msg.	Completed Calls	Return Calls	Call Backs
1	226	79	147	68	1
2	350	147	203	64	0
3	339	109	230	153	5
4	607	276	331	114	5
5	408	155	253	112	0
6	58	25	33	0	53
JUN TOTALS	1,988	791	1,197	511	64

**Ethics Hotline
2009 Monthly and Cumulative
Individual Paralegal Call Statistics**

JUL					
Paralegal	Total Calls	Left Msg.	Completed Calls	Return Calls	Call Backs
1	278	101	177	98	20
2	502	254	248	79	68
3	377	131	246	132	9
4	497	214	283	103	1
5	285	108	177	84	0
6	83	32	51	7	55
JUL TOTALS	2,022	840	1,182	503	153

AUG					
Paralegal	Total Calls	Left Msg.	Completed Calls	Return Calls	Call Backs
1	294	105	189	102	28
2	241	107	134	29	36
3	386	129	257	109	18
4	386	166	220	73	22
5	263	86	177	94	20
6	242	124	118	27	25
AUG TOTALS	1,812	717	1,095	434	149

Y-T-D					
Paralegal	Total Calls	Left Msg.	Completed Calls	Return Calls	Call Backs
1	2,243	772	1,471	747	75
2	2,980	1,418	1,562	471	115
3	2,878	1,029	1,849	895	57
4	4,123	1,811	2,312	807	44
5	2,500	894	1,606	841	30
6	1,124	559	565	79	518
Y-T-D TOTALS	15,848	6,483	9,365	3,840	839

NOTE: The entries for paralegal 6 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, 2009	
Budget (Actual)	\$1,289,043
Budget (Authorized)	\$1,490,523
Savings	\$201,480

Monthly as of August 31, 2009						
	<u>January</u>	<u>February</u>	<u>March</u>	<u>April</u>	<u>May</u>	<u>June</u>
Budget (Actual)	\$136,879	\$129,283	\$156,573	\$153,296	\$217,803	\$166,749
Budget (Authorized)	\$175,480	\$176,494	\$176,988	\$177,054	\$251,612	\$177,381
Savings	\$38,601	\$47,211	\$20,415	\$23,758	\$33,809	\$10,632
	<u>July</u>	<u>August</u>	<u>September</u>	<u>October</u>	<u>November</u>	<u>December</u>
Budget (Actual)	\$164,562	\$163,898				
Budget (Authorized)	\$177,761	\$177,753				
Savings	\$13,199	\$13,855	\$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

RECEIVED

By leem at 11:13 am, Sep 01, 2009



We thank you for calling the Ethics Hotline and welcome any comments or suggestions that you may have. Submit completed surveys by clicking **SUBMIT** at the end of the 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:

Thank god for the good people at the Ethics Hotline. Elbert Lee was instantly familiar with the issue and guided me to the 3 top references on the subject, and an insight into a Rule revision being circulated for comments

Paralegal you spoke with (optional)

Elbert Lee

Call Date

09/01/2009

Your Name

Street Address

Email Address

City

State

Zip Code

RECEIVED

By leem at 12:43 pm, Jun 10, 2009

Ethics Hotline Customer Satisfaction Survey



We thank you for calling the Ethics Hotline and welcome any comments or suggestions that you may have. Submit completed surveys by clicking **SUBMIT** at the end of the 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

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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:

I truly appreciate the ethics hotline service. Thank you!

Paralegal you spoke with (optional)

Lynn Cobb

Call Date

06/09/2009

Your Name

Street Address

E-mail Address

City

State

California

Zip Code

We regard feedback as the key to understanding the needs and expectations of our customers. To ensure excellent service and customer satisfaction, feedback received will be reviewed by management and maintained as public record. Surveys may be submitted anonymously.

Fax completed surveys to: (415) 538-2171.

Ethics Hotline Customer Satisfaction Survey

RECEIVED

By leem at 5:06 pm, Aug 18, 2009



We thank you for calling the Ethics Hotline and welcome any comments or suggestions that you may have. Submit completed surveys by clicking **SUBMIT** at the end of the 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

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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:

Very knowledgeable and helpful. Had a call back within a couple of hours of my initial call.

Paralegal you spoke with (optional)

Lynn Cobb

Call Date

08/18/2009

Your Name

Street Address

E-mail Address

City

State

California

Zip Code

RECEIVED

By leem at 12:34 pm, Jun 04, 2009



Ethics Hotline Customer Satisfaction Survey

We thank you for calling the Ethics Hotline and welcome any comments or suggestions that you may have. Submit completed surveys by clicking **SUBMIT** at the end of the 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

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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:

I also do public interest work at the Law Library, so I am familiar with the type of service you provide. I found the hotline to be extremely helpful and intend to use it again. Ricardo was extremely knowledgeable and knew exactly how to help me. Thanks!!

Paralegal you spoke with (optional)

Ricardo Patino

Call Date

06/04/2009

Your Name

Street Address

E-mail Address

City

State

California

Zip Code

We regard feedback as the key to understanding the needs and expectations of our customers. To ensure excellent service and customer satisfaction, feedback received will be reviewed by management and maintained as public record. Surveys may be submitted anonymously.

Fax completed surveys to: (415) 538-2171.

Ethics Hotline Customer Satisfaction Survey

RECEIVED

By leem at 3:07 pm, Jul 14, 2009



We thank you for calling the Ethics Hotline and welcome any comments or suggestions that you may have. Submit completed surveys by clicking **SUBMIT** at the end of the 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:

Ricardo, like everyone, did an excellent job. He even discussed the issue with other Hotline responders to give me a better answer.

Since I, like many attorney, live abroad, you might want to add "out of usa" as an option on "state."

Paralegal you spoke with (optional)

Ricardo Patino

Call Date

07/14/2009

Your Name

Street Address

E-mail Address

City

State

California

Zip Code

Ethics Hotline Customer Satisfaction Survey

RECEIVED

By leem at 4:26 pm, Aug 19, 2009



We thank you for calling the Ethics Hotline and welcome any comments or suggestions that you may have. Submit completed surveys by clicking **SUBMIT** at the end of the form.

Please choose the best answer for each question.

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

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How satisfied are you with the information our staff provided? Very Dissatisfied Dissatisfied Neutral Satisfied Very Satisfied

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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:

My only recommendation is that staff is added so that calls can be returned the same day. This is the service of the California State Bar I use most along with the attorney directory. I think the Ethics Hotline is one of the most important service provided. Even if I do not use it every month, I know it is a resource I can call and that is a source of comfort. Ricardo assisted me today, August 19, 2009; he seemed to be very familiar with the rules and cases and opinions.

Paralegal you spoke with (optional)

Ricardo Patino

Call Date



Your Name

Street Address

E-mail Address

City

State

California

Zip Code

Ethics Hotline Customer Satisfaction Survey

RECEIVED

By leem at 10:43 am, Aug 06, 2009



We thank you for calling the Ethics Hotline and welcome any comments or suggestions that you may have. Submit completed surveys by clicking **SUBMIT** at the end of the 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:

Ethics issues that typically arise in the course of practice usually require a quick determination. The lag time of several days makes this service virtually useless.

Paralegal you spoke with (optional)

Call Date

08/06/2009



Your Name

Street Address

E-mail Address

City

State

California

Zip Code

Ethics Hotline Customer Satisfaction Survey

RECEIVED

By leem at 4:31 pm, Aug 20, 2009



We thank you for calling the Ethics Hotline and welcome any comments or suggestions that you may have. Submit completed surveys by clicking **SUBMIT** at the end of the 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:

Very prompt and helpful information from the staff.

Paralegal you spoke with (optional)

Call Date

Your Name

Street Address

E-mail Address

City

State

California

Zip Code

We regard feedback as the key to understanding the needs and expectations of our customers. To ensure excellent service and customer satisfaction, feedback received will be reviewed by management and maintained as public record. Surveys may be submitted anonymously.

Fax completed surveys to: (415) 538-2171.

[Contact Support](#)

Ethics Hotline Customer Satisfaction Survey

RECEIVED

By leem at 11:02 am, Sep 15, 2009



We thank you for calling the Ethics Hotline and welcome any comments or suggestions that you may have. Submit completed surveys by clicking **SUBMIT** at the end of the 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:

Paralegal you spoke with (optional)

Call Date

Your Name

Street Address

Email Address

City

State

California

Zip Code

Ethics Hotline Customer Satisfaction Survey

RECEIVED

By leem at 11:03 am, Aug 31, 2009



We thank you for calling the Ethics Hotline and welcome any comments or suggestions that you may have. Submit completed surveys by clicking **SUBMIT** at the end of the 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:

Paralegal you spoke with (optional)

Susan Der

Call Date

08/31/2009

Your Name

Street Address

Email Address

City

State

Zip Code

RECEIVED

By leem at 11:14 am, Jun 17, 2009

Ethics Hotline Customer Satisfaction Survey



We thank you for calling the Ethics Hotline and welcome any comments or suggestions that you may have. Submit completed surveys by clicking **SUBMIT** at the end of the 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:

I had several conversations with ethics hot line employee Mark Taxy who went above and beyond to help me find the answers to my questions. He did extensive legal research to inform me of the relevant law and followed up several times to make sure that I was fully advised of all applicable law. I am very satisfied and will call again if necessary. I will also tell my colleagues to call if they have any ethical issues or questions.

Thank you!

Paralegal you spoke with (optional)

Other

Call Date

06/17/2009

Your Name

Street Address

E-mail Address

City

State

California

Zip Code

We regard feedback as the key to understanding the needs and expectations of our customers. To ensure excellent service and customer satisfaction, feedback received will be reviewed by management and maintained as public record. Surveys may be submitted anonymously.

Fax completed surveys to: (415) 538-2171.

[Contact Supp](#)

8/11/09

Susan:

Thank you again for
your help last week.
I appreciate the time
you spent on the phone
with me, the reference information
you gave me, as well as
the kindness in your
voice. You helped put my
mind at ease.

Sincerely,

8/11/09

Susan:

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I appreciate the time
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you gave me, as well as
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mind at ease.

Sincerely,