



MEMORANDUM

DATE: December 18, 2009
TO: Members of the Board's Regulation & Admissions Oversight Committee
FROM: Randall Difuntorum, Director, Professional Competence Programs
SUBJECT: RAC Meeting on January 7, 2010 – Status of the Professional Competence Unit

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This memorandum provides an update on the activities of the Professional Competence Unit through October 31, 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 October 31, 2009, 13,537 member inquiries were received with a completion rate of 85%. This completion rate includes distribution of 516 copies of published ethics opinions and other written materials requested by inquirers and 5,792 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, 898 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 September 1, 2009 through October 31, 2009, 6 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.)

2. COPRAC

- Since the last Professional Competence status report submitted for the Board Committee's November 12, 2009 meeting, COPRAC met on October 30th in Los Angeles. At the October meeting COPRAC considered and finalized 9 letters of comment on proposed new and amended rules for submission to the Rules Revision Commission.

- The following opinion is currently circulating for a public comment period ending on January 4, 2010:

Formal Opinion Interim No. 08-0002 (comment deadline: January 4, 2010):

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.

- The following opinion was tentatively approved by COPRAC for a 90-day public comment circulation and will be posted at the public comment page of the Bar's website at the time of RAC's January meeting:

Formal Opinion Interim No. 06-0004 (comment deadline: TBD)

ISSUE: If an attorney receives from a non-party a confidential communication between opposing counsel and opposing counsel's client, what should the attorney do if the attorney reasonably believes that the communication may not be privileged because of the crime-fraud exception to the attorney-client privilege?

DIGEST: If an attorney receives a confidential written communication between opposing counsel and opposing counsel's client under circumstances reasonably suggesting that the crime-fraud exception precludes application of the attorney-client privilege, the attorney may ethically read the communication. If the document may be privileged but for the crime-fraud exception, the attorney must notify opposing counsel as soon as possible that the attorney has possession of the communication. The two attorneys should try to resolve the privilege issue or, if that fails, obtain the assistance of a court. Until the issue is resolved, the attorney may not disseminate or otherwise use the communication or its contents.

- As mentioned in RAC's November meeting report, the summaries of the evaluations for the four educational programs conducted by COPRAC at the State Bar Annual Meeting held in San Diego are attached. On average the responses received for each panel gave a rating of 4.6 (on a scale of 1 – 5, 5 being the highest) as to the question of "to what extent did the program contain significant current intellectual or practical content." The individual evaluation forms for these programs are available upon request.
- COPRAC's next meeting is scheduled for January 15, 2010 and will be held in San Francisco. At this meeting the new members will also attend a technical training session on the use of the collaboration software used to streamline committee communications and opinion drafting, and reduce the expense of mailing agenda materials.

3. RULES REVISION COMMISSION

- Since the last Professional Competence status report submitted for the Board Committee's November 12, 2009 meeting, the Commission met once on December 11 & 12 in San Francisco. At this meeting, the Commission considered the public comments received on its Batch 4 proposals and finalized its Batch 6 proposals for submission to the Board Committee in January for public comment authorization. The Commission also considered the four rules presented to the Board Committee in November which were not adopted by the Board. Stakeholders appeared to address the Commission the issue of advance consents to future conflicts of interests. Governor Streeter attended the Commission's meeting and participated in the discussion of the rules, in particular the conflicts rules.
- Next month, the Board Committee will consider: (1) whether to circulate the Commission's Batch 6 proposals for a 60-day public comment period; and (2) whether to adopt the Batch 4 proposals following public comment. The Board and Board Committee also will consider the adoption of the proposed rules submitted in November which were not adopted by the Board.

- The public comment period for the Commission's Batch 5 proposed rules ended on November 13, 2009 and the Commission will consider revisions to those rules in response to the public comments at its January 22 & 23, 2010 meeting.
- A public hearing to receive testimony on the Batch 5 proposals was held on November 10, 2009 at the State Bar's Office in San Francisco. The testimony consumed the entire three hours scheduled for the hearing. Among the speakers who testified was a representative of the California District Attorneys Association.
- The Commission's next meetings are scheduled for January 22 & 23, 2010 in Los Angeles and February 26 & 27, 2010, in Los Angeles..

4. COMPETENCE PUBLICATIONS

- Handbook on Client Trust Accounting for CA Attorneys:
The online version of the handbook has been downloaded 111,384 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 October 31, 2009, 371 copies of the Compendium updates were sold. Sales of the 2009 Compendium update began in late October. The online version of the Compendium index has been downloaded 85,950 times, year-to-date.
- CA Rules of Professional Conduct & State Bar (a.k.a Publication No. 250):
As of October 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 91,026 times, year-to-date.

5. COMPETENCE RESOURCES AT CALBAR.CA.GOV

- The meeting materials for the Rules Revision Commission's November 5 & 6 and December 11 & 12 meetings were posted at the Commission's Meeting Materials page of the website.
- The Rules Revision Commission's Draft Rules page was updated to include a link to the full text of the Batch 1, 2 & 3 rule proposals tentatively adopted by the Board of Governors at its November 14, 2009 meeting.
- 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 98,493 times, year-to-date.

cc: Robert A. Hawley

Professional Competence Staff List

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

Professional Competence Employees as of October 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	488
September	22	1383	1203	180	87%	13%	48	599
October	22	1420	1197	223	84%	16%	65	561
Cumulative Totals	210	13,537	11,545	1,992	85%	15%	516	5,792

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 October 31, 2009)

Daily: Incoming Calls: 64
Completed Calls: 55

Monthly: Incoming Calls: 1,354
Completed Calls: 1,155

Aggregate Outgoing Calls

Current Month: 1,993

Cumulative to Date: 19,854

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

JUNE					
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
JUNE TOTALS	1,988	791	1,197	511	64

Ethics Hotline
2009 Monthly and Cumulative
Individual Paralegal Call Statistics

JULY					
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
7			0		
JULY TOTALS	2,022	840	1,182	503	153

AUG					
Paralegal	Total Calls	Left Msg.	Completed Calls	Return Calls	Call Backs
1	315	115	200	109	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
7					
AUG TOTALS	1,833	727	1,106	441	149

SEPT					
Paralegal	Total Calls	Left Msg.	Completed Calls	Return Calls	Call Backs
1	270	101	169	82	10
2	281	133	148	45	0
3	365	137	228	125	0
4	451	186	265	97	0
5	410	172	238	141	0
6	184	79	105	42	0
7	31	19	12	0	31
SEPT TOTALS	1,992	827	1,165	532	41

OCT					
Paralegal	Total Calls	Left Msg.	Completed Calls	Return Calls	Call Backs
1	240	89	151	88	1
2	436	196	240	67	0
3	367	143	224	116	0
4	501	201	300	106	0
5	432	152	280	143	0
6	17	11	6	0	17
7					
OCT TOTALS	1,993	792	1,201	520	18

Y-T-D					
Paralegal	Total Calls	Left Msg.	Completed Calls	Return Calls	Call Backs
1	2,774	972	1,802	924	86
2	3,697	1,747	1,950	583	115
3	3,610	1,309	2,301	1,136	57
4	5,075	2,198	2,877	1,010	44
5	3,342	1,218	2,124	1,125	30
6	1,325	649	676	121	535
7	31	19	12	0	31
Y-T-D TOTALS	19,854	8,112	11,742	4,899	898

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 October 31, 2009	
Budget (Actual)	\$1,701,227
Budget (Authorized)	\$1,920,398
Savings	\$219,171

Monthly as of October, 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	\$198,578	\$213,606		
Budget (Authorized)	\$177,761	\$177,753	\$177,967	\$251,908		
Savings	\$13,199	\$13,855	-\$20,611	\$38,302	\$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.

#38 - Conflicts for Lawyers: How to get Yourself Disqualified, Sued and Disciplined

(88 attendees - 80 responses)

On a scale of 1 - 5 (5 being the highest; 1 being the lowest)

5 4 3 2 1 Avg.

To what extent were your personal objectives satisfied?	37	27	8	2	0	4.3
To what extent did the environment contribute to the learning experience?	29	26	15	5	0	4.1
To what extent did the materials contribute to the learning experience?	43	23	4	2	0	4.5
To what extent were the objectives stated in the promotional literature or those stated at the beginning of the activity satisfied?	40	23	8	1	0	4.4
To what extent did the program contain significant current intellectual or practical content?	40	26	4	3	0	4.4

<u>Instructor</u>	Overall Teaching Effectiveness						Effectiveness of Teaching Methods						Significant Current Intellectual or Practical Content					
	5	4	3	2	1	Avg.	5	4	3	2	1	Avg.	5	4	3	2	1	Avg.
Brian L. Forbes	28	27	7	2	1	4.2	27	26	6	2	2	4.2	33	22	5	2	0	4.4
Jon L. Rewinski	32	24	8	1	0	4.3	30	23	5	5	0	4.2	32	24	4	2	0	4.4
Neil J. Wertlieb	24	25	9	3	0	4.1	21	26	7	5	0	4.1	23	29	5	2	0	4.2

#51 - Ethics Update 2009: Significant Developments in the Law of Lawyering

(109 attendees - 64 responses)

On a scale of 1 - 5 (5 being the highest; 1 being the lowest)

	5	4	3	2	1	Avg.
To what extent were your personal objectives satisfied?	34	17	10	1	0	4.4
To what extent did the environment contribute to the learning experience?	24	20	10	5	2	4.0
To what extent did the materials contribute to the learning experience?	37	16	7	1	1	4.4
To what extent were the objectives stated in the promotional literature or those stated at the beginning of the activity satisfied?	35	19	6	0	0	4.5
To what extent did the program contain significant current intellectual or practical content?	40	14	6	0	0	4.6

<u>Instructor</u>	Overall Teaching Effectiveness						Effectiveness of Teaching Methods						Significant Current Intellectual or Practical Content					
	5	4	3	2	1	Avg.	5	4	3	2	1	Avg.	5	4	3	2	1	Avg.
Carole Buckner	33	18	3	1	0	4.5	27	17	4	2	0	4.4	35	13	2	1	0	4.6
Dennis Maio	35	19	1	0	0	4.6	31	16	2	1	0	4.5	34	14	2	0	0	4.6
Suzanne Mellard	30	18	4	3	0	4.4	26	15	6	3	0	4.3	34	11	5	1	0	4.5

#63 Avoiding Involuntary Pro Bono Work: Forming the Attorney-Client Relationship and Collecting Fees

(174 attendees - 51 responses)

On a scale of 1 - 5 (5 being the highest; 1 being the lowest)

	5	4	3	2	1	Avg.
To what extent were your personal objectives satisfied?	21	19	6	1	2	4.1
To what extent did the environment contribute to the learning experience?	18	22	7	1	2	4.1
To what extent did the materials contribute to the learning experience?	25	15	5	4	0	4.2
To what extent were the objectives stated in the promotional literature or those stated at the beginning of the activity satisfied?	26	14	7	1	1	4.3
To what extent did the program contain significant current intellectual or practical content?	30	13	4	0	1	4.5

<u>Instructor</u>	Overall Teaching Effectiveness						Effectiveness of Teaching Methods						Significant Current Intellectual or Practical Content					
	5	4	3	2	1	Avg.	5	4	3	2	1	Avg.	5	4	3	2	1	Avg.
Dan Carroll	21	11	4	0	0	4.5	22	7	3	3	0	4.4	23	11	1	0	0	4.6
Wendy Mazzarella	25	11	1	0	0	4.6	26	6	2	2	0	4.6	25	11	0	0	0	4.7
David Parker	21	14	1	0	0	4.6	23	9	0	2	0	4.6	23	11	0	0	0	4.7
Jeffrey Tidus	21	12	3	0	0	4.5	21	9	3	2	0	4.4	23	11	1	0	0	4.6

#97 People's Money: An Overview of Client Trust Accounting

(68 attendees - 17 responses)

On a scale of 1 - 5 (5 being the highest; 1 being the lowest)

	5	4	3	2	1	Avg.
To what extent were your personal objectives satisfied?	13	3	0	0	0	4.8
To what extent did the environment contribute to the learning experience?	9	3	4	0	0	4.3
To what extent did the materials contribute to the learning experience?	12	4	0	0	0	4.8
To what extent were the objectives stated in the promotional literature or those stated at the beginning of the activity satisfied?	13	2	0	0	0	4.9
To what extent did the program contain significant current intellectual or practical content?	14	2	0	0	0	4.9

<u>Instructor</u>	Overall Teaching Effectiveness						Effectiveness of Teaching Methods						Significant Current Intellectual or Practical Content					
	5	4	3	2	1	Avg.	5	4	3	2	1	Avg.	5	4	3	2	1	Avg.
Shawn Harpen	9	5	0	0	0	4.6	7	5	0	0	0	4.6	9	3	0	0	0	4.8
Edward McIntyre	11	3	0	0	0	4.8	10	2	0	0	0	4.8	10	2	0	0	0	4.8
Jon Rowinski	9	4	0	0	0	4.7	8	3	0	0	0	4.7	9	2	0	0	0	4.8

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

Cit

State

Tennessee

Zip Code

Ethics Hotline Customer Satisfaction Survey

RECEIVED

By leem at 5:17 pm, Oct 22, 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)

Lynn Cobb

Call Date

10/22/2009

Your Name

Street Address

E-mail Address

City

State

California

Zip Code

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

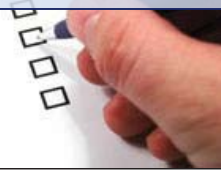
California

Zip Code

Ethics Hotline Customer Satisfaction Survey

RECEIVED

By leem at 2:42 pm, Sep 30, 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:

The receptionist was rude and more than slightly condescending. In fact, he told me that the lines were very busy because people who called earlier in the week were calling back to find out why they hadn't been called back yet and those callers were clogging up the lines. He went on to say, in a very condescending tone, "you can play that game too if you like."

He was also very condescending while doing something as simple as taking down my name. After I said my last name very clearly, there was a more than few seconds silence until he finally said, "you're gonna help me with that right?" referring to the spelling of my name.

It was more than obvious that the receptionist was not happy doing intakes and he felt it was necessary to convey that to the callers.

Please note that this survey was completed before even speaking to a Paralegal, and ONLY refers to the performance of the receptionist.

Paralegal you spoke with (optional)

Call Date

Your Name

Street Address

E-mail Address

City

State

California

Zip Code

RECEIVED

By leem at 11:10 am, Oct 09, 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:

Paralegal you spoke with (optional)

Call Date

10/06/2009

Your Name

Street Address

E-mail Address

City

State

California

Zip Code

Ethics Hotline Customer Satisfaction Survey

RECEIVED

By leem at 5:15 pm, Oct 21, 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

E-mail Address

City

State

California

Zip Code