

**ASSESSMENT OF PERFORMANCE
OF THE STANDING COMMITTEE
ON PROFESSIONAL RESPONSIBILITY AND CONDUCT
OF THE STATE BAR OF CALIFORNIA**

2011 Year End

Chair: Wendy L. Patrick
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Summary of Accomplishments

The Committee on Professional Responsibility and Conduct ("COPRAC" or "the Committee") is assigned to develop advisory ethics opinions, to conduct educational programs, and to assist the Board of Trustees in matters pertaining to attorney professional responsibility. This report presents an assessment of the Committee's 2010 activities and accomplishments.

1. Conducted 5 one-day and 2 two-day meetings.
2. Published 6 proposed opinions for public comment, one of which was an additional public comment circulation of a previously published opinion.
3. Published 3 formal opinions approved by the Board of Trustees for inclusion in the 2011 update to the *California Compendium on Professional Responsibility*, and posting online at the State Bar's website.
4. Administered the 15th Annual Statewide Ethics Symposium at UC Irvine, School of Law.
5. New in 2011, videotaped and offered the 15th Annual Statewide Ethics Symposium panels as a live webcast and, after the live event, also made them available at the Bar's website for online participatory credit in legal ethics.
6. Presented 4 ethics programs at the State Bar Annual Meeting, all of which were selected for videotaping for use as a self-study program offering ethics credit.
7. Participated in 26 CLE outreach programs including requests from local and specialty bar associations.

Performance Indicators and Actual Performance

1. **[Performance Indicator] Meetings** - To carry out its charge, 9-10 day-long meetings will be held in FY 2011. Most of these meetings will be held in-person at the State Bar facilities in San Francisco or Los Angeles, or at an airport hotel location. Meetings scheduled later in the fiscal year will be planned as video-conference meetings. However, the Committee hopes to realize budget savings and use these savings to convert these video-conference meetings into in-person meetings. Given the nature of the Committee's work, in-person member participation is the most productive meeting format.

[Actual Performance] In FY 2011, COPRAC met for a total of 9 meeting days, 5 one-day meetings and 2 two-day meetings. The 2011 meeting schedule is attached. (Attachment A)

2. **[Performance Indicator] Ethics Opinions** - COPRAC plans to issue 3 – 5 formal ethics opinions. The Committee shall assist members of the State Bar in their desire to appreciate and adhere to ethical and professional standards of conduct, which assistance shall include, but is not limited to:

1. Issuing to members of the bar advisory opinions on the ethical propriety of hypothetical attorney conduct at the request of members of the State Bar or on its own initiative;
2. Responding to such inquiries from members of the bar; and
3. Publishing its opinions.

[Actual Performance] In FY 2011, the Committee issued 6 opinions for public comment distribution (Interim Op. Nos. 06-0004, 08-0001, 08-0003, 09-0001A, 10-0002 and 10-0003). Three of the proposed opinions subsequently were submitted to RAD for final publication and were officially published as State Bar Formal Opinion Nos. 2011-180, 2011-181 and 2011-182. The new formal opinions were included in the 2011 update to the *California Compendium on Professional Responsibility* and posted online at the Ethics Opinions page of the Bar's website. One opinion (06-0004 re Confidential Information and Unsolicited E-Mail Correspondence) was issued for a second public comment period. This opinion is now being redrafted as an article scheduled for publication in 2012. The public comment circulations for two opinions (Interim Op. Nos. 09-0001A and 10-0003) were circulated late in 2011, with public comment deadlines falling in early 2012 (January 31, 2012 and March 23, 2012, respectively). The Committee will consider the public comment received on these opinions in early 2012. A summary of the published opinions and the opinions distributed for public comment is attached. (Attachment B)

A complete archive of the Committee's formal opinions published by the State Bar since its inception in 1965 is maintained at the Bar's website. In 2011, the Ethic Opinions homepage and its subpages were visited over 41,500 times. In addition, a new Ethics and Technology webpage was created in 2011 and, since its creation in September there were over 800 visits to the ethics opinions subpage of this new area, which primarily features COPRAC's opinions on the subject of ethics and technology.

3. **[Planned Activity] Legislation** - As assigned by the Board, COPRAC will review and analyze bills that relate to attorney professional responsibility, serve as a technical resource to the State Bar's Office of Government Affairs. On an as needed basis, COPRAC may comment in its own name with a disclaimer indicating its comment does not reflect the view of the State Bar or the Board of Trustees

[Activity Report] There was no legislation referred to the Committee by the Board in FY 2011 or any legislation that COPRAC followed which resulted in any comments from the Committee.

4. **[Planned Activity] Judicial Council - As assigned by the Board, COPRAC will review and analyze Rules of Court and other proposals or studies that relate to attorney professional responsibility, including proposed ethical rules for judges and arbitrators. On an as needed basis, COPRAC may comment in its own name with a disclaimer indicating its comment does not reflect the view of the State Bar or the Board of Trustees.**

[Activity Report] There were no Judicial Counsel referrals from the Board in FY 2011 or any Judicial Council matters followed by COPRAC.

5. **[Planned Activity] Conference of Delegates of California Bar Associations - As assigned by the Board, the Committee will review and analyze Conference resolutions that relate to attorney professional responsibility.**

[Activity Report] There were no resolutions referred to the Committee for consideration during FY 2011.

6. **[Planned Activity] American Bar Association House of Delegates - As assigned by the Board, the Committee will review and analyze ABA studies and proposals that relate to attorney professional responsibility (e.g., the ABA's study and revision of the Model Rules of Professional Conduct and the ABA's Report on Multidisciplinary Practice).**

[Activity Report] There were no referrals to the Committee by the Board in FY 2011.

7. **[Planned Activity] Annual Statewide Ethics Symposium - The Committee will plan and present a day-long statewide educational program offering a high level interactive discussion of key professional responsibility issues.**

[Activity Report] COPRAC's 15th Annual Statewide Ethics Symposium was held on April 9, 2011 at the University of California, Irvine School of Law. The theme of the Symposium was "*Ethics Across the Profession*." The panels presented included the following: "Ethics on the Outside: Electronic Communication and Professional Responsibility – Can They Co-Exist?," "Ethics on the Inside," "Ethics, Innocence and Prosecutorial Misconduct," and "Ethics in Limbo: Practical Issues for Lawyers as Changes in the Law Regulating Lawyers Continue." COPRAC Chair Shawn Harpen provided welcoming remarks. State Bar President Bill Hebert provided additional opening remarks. The keynote speaker was Erwin Chemerinsky, Founding Dean for the University of California, Irvine School of Law. There were over 139 attendees at the Symposium. The Symposium received high marks in all categories from the attendees. A copy of the Symposium Activity Evaluation Results is attached. (Attachment C)

The 2011 Symposium is the first Symposium that was presented both in-person and via live webcast. In addition, the individual panels were recorded and offered as State Bar provided online CLE programs for participatory credit. In 2011, COPRAC's online offerings of the 2011 Symposium panels were viewed 1,450 times. The panel entitled "Ethics in Limbo: Practical Issues for Lawyers as Changes in the Law Regulating Lawyers Continue" has been continuously offered for free MCLE credit in legal ethics.

8. **[Performance Indicator] State Bar Annual Meeting Programs - COPRAC plans to conduct 3 – 5 CLE programs in connection with the State Bar Annual Meeting (identification and preparation of program topics and materials begin in Spring 2011 for programs presented at the Annual Meeting in the Fall of 2011).**

[Actual Performance] COPRAC conducted 4 programs at the State Bar Annual Meeting held in Long Beach, CA in September 2011. The programs were entitled "Ethical Screens in California – To Be or Not to Be," "Dealing With Difficult Clients While Maintaining Your Professional Responsibilities," "Client Trust Accounting," and "Ethics Update 2011: Significant Developments in the Law of Lawyering." All four programs were selected for videotaping to be made available as part of the State Bar's online CLE resources. All of these programs were well attended and received high marks in all categories from the attendees. A copy of the Activity Evaluation Results is attached. (Attachment D)

In addition, 7 Annual Meeting programs presented by COPRAC, in 2011 and past years, were offered at the State Bar online CLE site for participatory credit in legal ethics. Collectively, these programs were viewed approximately 1,600 times in 2011. One 2011 panel on the topic of client trust accounting was offered for free MCLE credit in legal ethics.

9. [Planned Activity] Local Bar Outreach Programs - As opportunities arise, the Committee will coordinate with local and specialty bar associations in developing professional responsibility CLE programs tailored to local/specialty interests.

[Activity Report] During FY 2011, members of COPRAC represented the Committee as participants in 26 continuing legal education programs. Generally, at these programs the speaker's role as a member of COPRAC is to publicize the work of the Committee and to encourage members of the bar to submit opinion requests, to comment on proposed opinions and to apply to serve on the Committee. A table listing COPRAC member participation in outreach programs during FY 2011 is attached. (Attachment E)

10. [Planned Activity from 2009 Workplan] Coordination with other State Bar Entities - On matters of mutual interest, COPRAC will coordinate with State Bar entities.

[Activity Report] There were no matters requiring coordination with other State Bar entities during FY 2011.

ATTACHMENT A

COMMITTEE ON PROFESSIONAL RESPONSIBILITY AND CONDUCT

2011 SCHEDULE OF MEETINGS

January 14, 2011

Los Angeles State Bar Office

February 25, 2011

San Francisco State Bar Office

April 8, 2011 (Meeting)

April 9, 2011 (Symposium)

Los Angeles State Bar Office/UC Irvine

June 3, 2011

San Francisco State Bar Office

July 15 & 16, 2011

Los Angeles State Bar Office

September 15, 2011

Long Beach – State Bar Annual Meeting

November 4 & 5, 2011

San Diego – DLA Piper Law Firm

ATTACHMENT B

SUMMARY OF PUBLISHED OPINIONS (2011)

Officially Published Opinions

FORMAL OPINION NO. 2011-180

ISSUE: When does an attorney violate rule 4-400 of the California Rules of Professional Conduct by accepting a gift from a client?

DIGEST: An attorney who demonstrates by words or conduct an intent to cause a client to give the attorney a substantial gift violates rule 4-400. Whether a gift is substantial must be determined by examining issues such as the value of the gift from the perspective of both the client and the attorney both financially and otherwise, as well as general standards of fairness.

FORMAL OPINION NO. 2011-181

ISSUES: May consent under the “no contact” rule of California Rule of Professional Conduct 2-100 be implied, or must it be provided expressly? If consent may be implied, how is implied consent determined?

DIGEST: Consent under the “no contact” rule of California Rule of Professional Conduct 2-100 may be implied. Such consent may be implied by the facts and circumstances surrounding the communication with the represented party. Such facts and circumstances may include the following: whether the communication is within the presence of the other attorney; prior course of conduct; the nature of the matter; how the communication is initiated and by whom; the formality of the communication; the extent to which the communication might interfere with the attorney-client relationship; whether there exists a common interest or joint defense privilege between the parties; whether the other attorney will have a reasonable opportunity to counsel the represented party with regard to the communication contemporaneously or immediately following such communication; and the instructions of the represented party’s attorney.

FORMAL OPINION NO. 2001-182

ISSUES:

1. When at the outset of representation it appears an attorney would need to serve a discovery subpoena for production of documents on another current client of the attorney or the attorney’s law firm, may the attorney accept the representation of the new client and serve the discovery subpoena on the current client?
2. If doing so raises a conflict of interest, may the attorney seek informed written consent in order to accept the representation including possible service of the subpoena?
3. What obligations arise if an attorney seeks informed written consent?

DIGEST: When an attorney discovers at the outset of representation that the attorney must serve a discovery subpoena for production of documents on another current client of the attorney or the attorney’s law firm, serving the discovery subpoena is an adverse action such that a concurrent client conflict of interest arises. To represent a client who seeks to serve such a subpoena, the attorney must seek informed written consent from each client, disclosing the relevant circumstances and the actual and reasonably foreseeable adverse consequences to the client providing consent.

ATTACHMENT B

Opinions Published for Public Comment

FORMAL OPINION INTERIM NO. 06-0004 (additional 60-day public comment period)

- ISSUE:** If an attorney receives from a non-party a confidential written 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. However, 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.

FORMAL OPINION INTERIM NO. 08-0001

(Published as 2011-180. See issue and digest above.)

FORMAL OPINION INTERIM NO. 08-0003

(Published as 2011-182. See issues and digest above.)

FORMAL OPINION INTERIM NO. 09-0001A

- ISSUES:** In settling a dispute with a former client, may an attorney seek: (1) the former client's written representations that no State Bar complaint has been filed; (2) the former client's representation that he or she has no present intention to file a State Bar complaint; (3) the former client's written contractual agreement not to file a State Bar complaint against the attorney based on matters relating to or arising out of the representation; or (4) the former client's oral agreement not to file a State Bar complaint against the attorney based on matters relating to or arising out of the representation?
- DIGEST:** Business and Professions Code section 6090.5 prohibits an attorney from seeking a client's written or oral agreement not to file a State Bar complaint against that attorney. "Seeking" an agreement includes any attorney communication to a client proposing or suggesting a prohibited agreement. "Seeking" also may encompass factual recitations in the settlement agreement that the client has not filed a State Bar complaint, or concerning the client's future intentions regarding filing a State Bar complaint. Section 6090.5 might prohibit these types of recitations because they could produce an impermissible chilling effect on the client's future filing of a State Bar complaint. If a lawyer seeks an oral or written agreement to not file a State Bar complaint, withdrawal of that request does not cure the ethical violation.

FORMAL OPINION INTERIM NO. 10-0002

(Published as 2011-181. See issues and digest above.)

ATTACHMENT B

FORMAL OPINION INTERIM NO. 10-0003

ISSUE: May an attorney maintain a virtual law office practice (“VLO”) and still comply with her ethical obligations, if the communications with the client, and storage of and access to all information about the client’s matter, are all conducted solely through the internet using the secure computer servers of a third-party vendor (i.e., “cloud computing”).

DIGEST: As it pertains to the use of technology, the Business and Professions Code and the Rules of Professional Conduct do not impose greater or different duties upon a VLO practitioner operating in the cloud than they do upon an attorney practicing in a traditional law office. While an attorney may maintain a VLO in the cloud where communications with the client, and storage of and access to all information about the client’s matter, are conducted solely via the internet using a third-party’s secure servers, Attorney may be required to take additional steps to confirm that she is fulfilling her ethical obligations due to unique issues raised by the hypothetical VLO and its operation. Failure of Attorney to comply with all ethical obligations relevant to these issues will preclude the operation of a VLO in the cloud as described herein.

ATTACHMENT C

2011 ETHICS SYMPOSIUM EVALUATIONS

GENERAL EVALUATIONS

To what extent were your personal objectives satisfied?

- Panels 1 to 3 - 4; Panel 4 - 1
- The program was well presented and a source of good information. Thanks.
- Nicely organized event.
- I needed the MCLE credit to maintain my New Jersey license and actually learned a lot. Especially enjoyed Dean Chemerinsky.
- Yes
- Heavy on theory and rules but light on real life experiences.
- More than so.
- **Average Rating on a Scale of 1-5: 4.3**

To what extent did the environment contribute to the learning experience?

- Air conditioning not effective; semi-circle audience outstanding
- It was pleasure to be here. Big screens, comfortable chairs, well-litted room.
- Food was good too!
- Great classroom, a little packed and it was too warm.
- Room was too warm
- In general, a great venue -- the room got very warm by the end of the day.
- Great facilities
- Room was uncomfortably stuffy. Recommend not using locations at which you cannot control temperature.
- UCI facilities were comfortable and made it easy to see and hear.
- UCI great setting - Thank You!
- Have a moving microphone for questions from the audience instead of having to reiterate them into the panelists microphone. After 3pm the room became uncomfortably hot.
- For those of us who have never been to Irvine law, let alone Irvine University --> knowing or discovery of where this even took place was beyond difficult. None of the student parking lot attendants knew where this was. Too add more confusion, there was a pre-law event happening which confused them more. In short, signage or directions were really lacking. The classroom was great.
- Great location but it got really hot!!! No A/C!
- Fabulous facility!
- Very good except parking next door (no handicaps left)
- **Average Rating on a Scale of 1-5: 4.4**

ATTACHMENT C

To what extent did the materials contribute to the learning experience?

- "Except for "pitching" pages, Panel 1 exceptional; Panel 2 mediocre; Panel 3 light on pro public protection/prosecutorial; F - on application to OCTC prosecutors; Panel 4 - tip of the iceberg.
- Written materials did not seem to correspond to discussion. No copies of hypos in materials or last presentation.
- I haven't been able to read everything yet, but knowing I didn't have to take exhaustive notes was helpful.
- Can't tell, haven't reviewed yet.
- Too much to cover. Can't wait to review the materials - really!
- Receiving some materials in advance would provide time to read them.
- Excellent.
- Hard to know where speaker was in the materials provided. Only speaker with Powerpoints let us know where he was.
- Too much written materials, most of which was just referred to but not really relevant to panelists' discussions.
- Don't know yet
- Materials were terrible. Did not track presentations for Panel 4, Hypos not included, rules not in order, should have included more case law.
- Good
- **Average Rating on a Scale of 1-5: 4.2**

To what extent were the objectives stated in the promotional literature or those stated at the beginning of the activity satisfied?

- Didn't review promotional material. Unqualified to review except for panel IV.
- Exceeded.
- Yes
- The specific focus on in-house counsel and criminal cases was not applicable to my practice.
- **Average Rating on a Scale of 1-5: 4.3**

To what extent did the program contain significant current intellectual or practical content?

- This writer is OK with "practical" equalling zero and even greater emphasis on "intellectual" since attendees as a class are not "average reasonable lawyers" in need of bread and butter.
- First program on e-discovery was topical.
- Significance varies widely depending upon the listener of the content. Practical content for one practitioner is irrelevance to another. Is it possible, or practical, to split the symposium into smaller discrete modules?
- Debate during Innocence Project w/audience was great. Just couldn't be extended into a real discussion. Too hard to figure out where the provided literature the speakers were referring to.
- Very much -- new cases
- **Average Rating on a Scale of 1-5: 4.4**

ATTACHMENT C

PANEL ONE: ETHICS ON THE OUTSIDE: ELECTRONIC COMMUNICATION AND PROFESSIONAL RESPONSIBILITY - CAN THEY COEXIST?

Panelists: E. McIntyre, T. Forsheit, B. Marean, W. Patrick

Overall Teaching Effectiveness

- Average Rating on a Scale of 1-5: 4.5

Effectiveness of Teaching Methods

- Average Rating on a Scale of 1-5: 4.5

Significant Current Intellectual or Practical Content

- Average Rating on a Scale of 1-5: 4.6
-

PANEL TWO: ETHICS ON THE INSIDE

Panelists: N. Wertlieb, B. Danner, J. Weintraub, A. Weisner

Overall Teaching Effectiveness

- Average Rating on a Scale of 1-5: 4.0

Effectiveness of Teaching Methods

- Average Rating on a Scale of 1-5: 3.8

Significant Current Intellectual or Practical Content

- Average Rating on a Scale of 1-5: 4.1
-

PANEL THREE: INNOCENCE AND PROSECUTORIAL MISCONDUCT

Panelists: C. Buckner, J. Fox, M. Possley, C. Batchelor

Overall Teaching Effectiveness

- Average Rating on a Scale of 1-5: 4.1

Effectiveness of Teaching Methods

- Average Rating on a Scale of 1-5: 4.2

Significant Current Intellectual or Practical Content

- Average Rating on a Scale of 1-5: 4.3
-

PANEL FOUR: ETHICS IN LIMBO: PRACTICAL ISSUES FOR LAWYERS AS CHANGES IN THE LAW REGULATING LAWYERS CONTINUE

Panelists: D. Carroll, E. Peck, M. Tuft

Overall Teaching Effectiveness

- Average Rating on a Scale of 1-5: 4.4

Effectiveness of Teaching Methods

- Average Rating on a Scale of 1-5: 4.1

Significant Current Intellectual or Practical Content

- Average Rating on a Scale of 1-5: 4.5

ATTACHMENT D

#66 ETHICS UPDATE 2011: SIGNIFICANT DEVELOPMENTS IN THE LAW OF LAWYERING

To what extent were your personal objectives satisfied?

- "Very good, quick 1 1/2 hours. Thanks"
- "Excellent"
- "Terrific program!"
- "All presenters are excellent, interesting, entertaining; excellent content of written materials and presentations"
- "Some materials are in other ethics seminar"
- "Good and informative session. Wendy could do it alone."
- **Average Rating on a Scale of 1-5: 4.5**

To what extent did the environment contribute to the learning experience?

- "Room temp was comfortable"
- "Cold"
- **Average Rating on a Scale of 1-5: 4.3**

To what extent did the materials contribute to the learning experience?

- "Liked Powerpoint"
- "Very comprehensive"
- "Colors/contrast of powerpoint was difficult to read"
- **Average Rating on a Scale of 1-5: 4.4**

To what extent were the objectives stated in the promotional literature or those stated at the beginning of the activity satisfied?

- "Except it was so dry in presentation that it was hard to stay engaged"
- **Average Rating on a Scale of 1-5: 4.4**

To what extent did the program contain significant current intellectual or practical content?

- "Good informative program. Appreciate in-depth materials."
- "Don't care for presentation where presenter just reads from Powerpoint."
- "Social networking"
- "Thanks for including social networking info."
- **Average Rating on a Scale of 1-5: 4.6**

Instructor: Carole Buckner

- **Average Rating on a Scale of 1-5: 4.4**

Instructor: Shawn Harpen

- **Average Rating on a Scale of 1-5: 4.4**

Instructor: Wendy Patrick

- **Average Rating on a Scale of 1-5: 4.8**

Instructor: William Woods

- **Average Rating on a Scale of 1-5: 4.7**

#79 ETHICAL SCREENS IN CALIFORNIA: TO BE OR NOT TO BE?

To what extent were your personal objectives satisfied?

- “1 case discussed - expected more, although course description clear”
- “Terrific! Sophisticated!”
- “Was not a good use of program centered only on one case. Limited learning experience for solo practioner.”
- “As a superior court research attorney, this program gave me a useful analytical structure I will use when presented with motions for disqualification.”
- **Average Rating on a Scale of 1-5: 4.2**

To what extent did the environment contribute to the learning experience?

- “Significant distracting noise from next door.”
- **Average Rating on a Scale of 1-5: 4.2**

To what extent did the materials contribute to the learning experience?

- “Thanks for handout ~ needed for notes!!”
- “Liked the panel”
- **Average Rating on a Scale of 1-5: 4.2**

To what extent were the objectives stated in the promotional literature or those stated at the beginning of the activity satisfied?

- “Conversation style.”
- **Average Rating on a Scale of 1-5: 4.1**

To what extent did the program contain significant current intellectual or practical content?

- “Very informative.”
- **Average Rating on a Scale of 1-5: 4.6**

Instructor: Dan Carroll

- **Average Rating on a Scale of 1-5: 4.3**

Instructor: James Friedhofer

- **Average Rating on a Scale of 1-5: 4.3**

Instructor: Scott Garner

- **Average Rating on a Scale of 1-5: 4.4**

Instructor: Barbara McAuliffe

- **Average Rating on a Scale of 1-5: 4.3**

**#105 DEALING WITH DIFFICULT CLIENTS WHILE MAINTAINING
YOUR PROFESSIONAL RESPONSIBILITIES**

To what extent were your personal objectives satisfied?

- “This was an excellent presentation.”
- “All instructors did a great job - worked together well and kept me engaged the whole time.”
- **Average Rating on a Scale of 1-5: 4.6**

To what extent did the environment contribute to the learning experience?

- “Finally someone printed the materials!”
- “Room was cold.”
- “Hard to hear at times.”
- **Average Rating on a Scale of 1-5: 4.5**

To what extent did the materials contribute to the learning experience?

- “Clear, concise and in a great format to take back to my firm and share”
- “Very helpful.”
- “Presentation printout was useful.”
- “Thanks for making paper handouts.”
- **Average Rating on a Scale of 1-5: 4.8**

To what extent were the objectives stated in the promotional literature or those stated at the beginning of the activity satisfied?

- **Average Rating on a Scale of 1-5: 4.6**

To what extent did the program contain significant current intellectual or practical content?

- “I like the stories and examples.”
- **Average Rating on a Scale of 1-5: 4.7**

Instructor: Wendy Chang

- **Average Rating on a Scale of 1-5: 4.6**

Instructor: Risa Morris

- **Average Rating on a Scale of 1-5: 4.7**

Instructor: Toby Rothschild

- **Average Rating on a Scale of 1-5: 4.6**

Instructor: Neil Wertlieb

- **Average Rating on a Scale of 1-5: 4.7**

**#113 SOCIAL NETWORKING AND PROFESSIONAL RESPONSIBILITY:
CAN THEY CO-EXIST**

To what extent were your personal objectives satisfied?

- “Yes, good program!!”
- “I was looking for more info about marketing firms and organizations via social networks. But they are very good on their chosen subject matter.”
- **Average Rating on a Scale of 1-5: 4.5**

To what extent did the environment contribute to the learning experience?

- “Too much noise from staff movement of carts through inner hallway”
- “I found a seat with good view of screen. Room was too cold for me even with sweater on.”
- “Big trash cans at front of room were unsightly. Room was cold.”
- “Noise and cold.”
- “So cold in this room!”
- “Too cold in room.”
- **Average Rating on a Scale of 1-5: 4.1**

To what extent did the materials contribute to the learning experience?

- “Have not yet printed out from USB drive.”
- “Reading to us took up time. Let us read hypo and just discuss questions/analysis.”
- “Very relevant and helpful.”
- “Good format for organizing the info.”
- **Average Rating on a Scale of 1-5: 4.2**

To what extent were the objectives stated in the promotional literature or those stated at the beginning of the activity satisfied?

- **Average Rating on a Scale of 1-5: 4.6**

To what extent did the program contain significant current intellectual or practical content?

- “Good structure with hypotheticals. Great mix on panel-progessor, in-house, civil and criminal counsels. Good diversity on panel both gender and ethnic.”
- “Very practical. Really appreciated insight/considerations on cloud.”
- “Really interesting but some material was definitely intended for a non-tech audience.”
- **Average Rating on a Scale of 1-5: 4.6**

Instructor: Judith Gilbert

- **Average Rating on a Scale of 1-5: 4.3**

Instructor: Shawn Harpen

- **Average Rating on a Scale of 1-5: 4.6**

Instructor: Wesley Hsu

- **Average Rating on a Scale of 1-5: 4.6**

Instructor: Antone Johnson

- **Average Rating on a Scale of 1-5: 4.6**

Instructor: Kevin Mohr

- **Average Rating on a Scale of 1-5: 4.8**

#118 CLIENT TRUST ACCOUNTING

To what extent were your personal objectives satisfied?

- “Childish panel members/poor speaking skills”
- **Average Rating on a Scale of 1-5: 4.3**

To what extent did the environment contribute to the learning experience?

- “Worst program presentation -- ever!!!”
- “Some noise that was very distracting. Overheads did not work properly”
- “Powerpoint snafu detracted but presenters dealt with it”
- “Projector not working -- no slides”
- “Powerpoint presentation had technical difficulties”
- “Presentation didn’t work”
- “Powerpoint didn’t work”
- **Average Rating on a Scale of 1-5: 4.0**

To what extent did the materials contribute to the learning experience?

- “Excellent outline! Would have been even better if PPTs were online but outline is thorough and great”
- “Distraction never ended”
- “Completely different from what we saw from the presentation”
- **Average Rating on a Scale of 1-5: 3.8**

To what extent were the objectives stated in the promotional literature or those stated at the beginning of the activity satisfied?

- **Average Rating on a Scale of 1-5: 4.3**

To what extent did the program contain significant current intellectual or practical content?

- **Average Rating on a Scale of 1-5: 4.4**

Instructor: Natalie Bocanegra

- **Average Rating on a Scale of 1-5: 4.4**

Instructor: Fred Kipperman

- **Average Rating on a Scale of 1-5: 4.3**

Instructor: Risa Morris

- **Average Rating on a Scale of 1-5: 4.5**

ATTACHMENT E

2011 COPRAC Member Outreach Programs

	Date	Name	Sponsor	Location
1.	01-2011	Wendy Chang	Asian Pacific American Bar Association	Los Angeles, CA
2.	01-12-2011	Wendy L. Patrick	Consumer Attorneys of San Diego	San Diego, CA
3.	01-20-2011	Wendy L. Patrick	San Diego County Bar Association	San Diego, CA
4.	01-20-2011	Ed. J. McIntyre	San Diego County Bar Association	San Diego, CA
5.	01-20-2011	Shawn Harpen	Jones Day	Irvine, CA
6.	01-28-2011	Wendy L. Patrick	California Association of Realtors'	San Diego, CA
7.	02-25-2011	Carole Buckner	USF School of Law	San Francisco, CA
8.	02-17-2011	Wendy L. Patrick	San Diego County Bar Association	San Diego, CA
9.	03-05-2011	Wendy L. Patrick	Knobbe Martins Olson & Bear	Irvine, CA
10.	04-19-2011	Wendy L. Patrick	Thomas Jefferson School of Law	San Diego, CA
11.	05-13-2011	Neil Wertlieb	The Macerich Company	Santa Monica, CA
12.	06-13-2011	Neil Wertlieb	Paramount Pictures	Hollywood, CA
13.	07-12-2011	Neil Wertlieb	Allergan	Irvine, CA
14.	08-10-2011	Wendy L. Patrick	City Attorney of San Diego	San Diego, CA
15.	09-2011	Carole Buckner	Los Angeles Paralegal Association	Los Angeles, CA
16.	09-07-2011	Wendy L. Patrick	Gordon and Rees	San Diego, CA
17.	09-28-2011	Neil Wertlieb	Roll International	Santa Monica, CA
18.	10-12-2011	Wendy L. Patrick	San Diego County Bar Association	San Diego, CA
19.	10-15-2011	Shawn Harpen	Association of Business Trial Lawyers	Santa Barbara, CA
20.	10-15-2011	Carole Buckner	Association of Business Trial Lawyers	Santa Barbara, CA
21.	10-22-2011	Wendy L. Patrick	USC School of Law and Beverly Hills Bar Association	Los Angeles, CA
22.	11-08-2011	Neil Wertlieb	Business Law Section of the California State Bar	Los Angeles, CA (via webinar)
23.	11-14-2011	Carole Buckner	Abraham Lincoln University	Los Angeles, CA
24.	11-22-2011	Neil Wertlieb	Beach Point Capital	Santa Monica, CA
25.	12-09-2011	Wendy L. Patrick	Littler Mendelson	San Diego, CA
26.	12-15-2011	Shawn Harpen	Nevada Standing Committee on Ethics and Professional Responsibility	Las Vegas, NV