



PUBLIC TRUST LIAISON

The State Bar of California





Formally Launched on January 9, 2023, the Public Trust Liaison...



Responds to questions and concerns brought by members of the public



Helps to ensure that proper procedures are followed in OCTC and Admissions



Proactively educates public on how discipline process works



Makes recommendations, based on findings, for improvements to the attorney discipline system and admissions processes



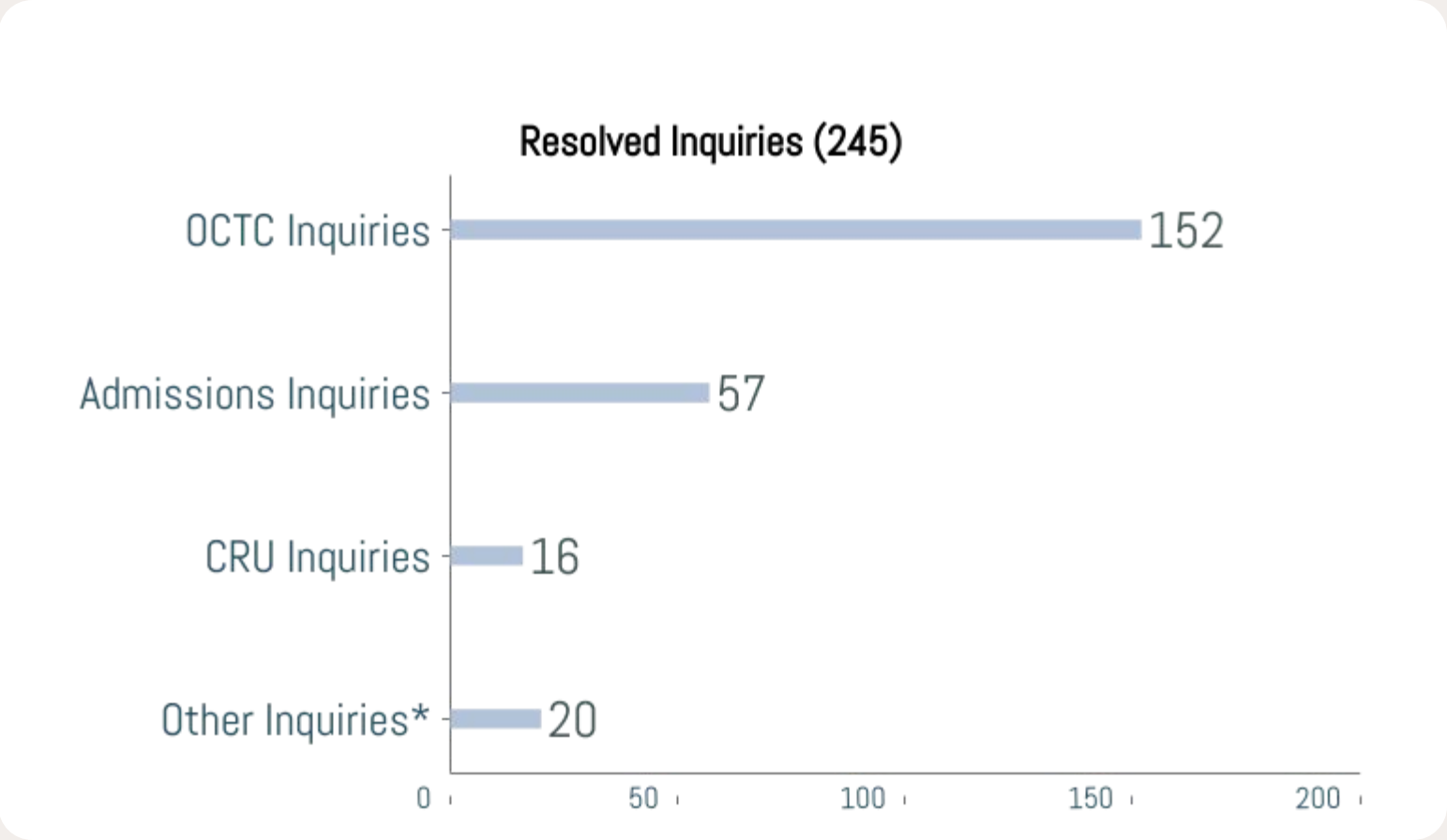
Is independent and impartial from OCTC and Admissions allowing for objective evaluation of complaints from the public and objective annual reports to State Bar leadership

Inquiry Statistics

A six-month overview



446	Total PTL Inquiries
201	Active PTL Inquiries Pending



*Inquiries regarding the State Bar website, the legal profession generally, and miscellaneous questions.



Issues Identified for Action

- No process for identifying complaints against applicants to the State Bar
- Efficient way to handle situation where complainants file new allegation against same attorneys
- Deceased attorneys
 - how to report
 - how to get file back
 - how can other attorneys help to close IOLTA accounts
- CRU
 - more readily accessible information needed
 - ability to provide status updates

THE OFFICE OF PUBLIC TRUST LIAISON
ALSO INCLUDES THE CONTACT CENTER



104,514 Contact Center inbound
calls handled in 2022

- First contact with the public, assist in transcribing complaints for the public with disabilities, and filing out PTL inquiries, answer questions about the State Bar's procedures, offices, and updates on current matters
- Using a Language Line that supports 240 languages

Under the PTL: Expanding their scope of responsibility and training

- Included confidentiality training and live scan fingerprinting
- Public Trust Representatives (PTR) will receive Odyssey training so that they can provide expanded support
- PTRs will eventually help with PTL inquiries

Contact Center Challenges



Hiring Freeze

Hiring delays impacting
staffing levels



Longer Wait Times

Often exceeds 30 minutes
during lunch hour

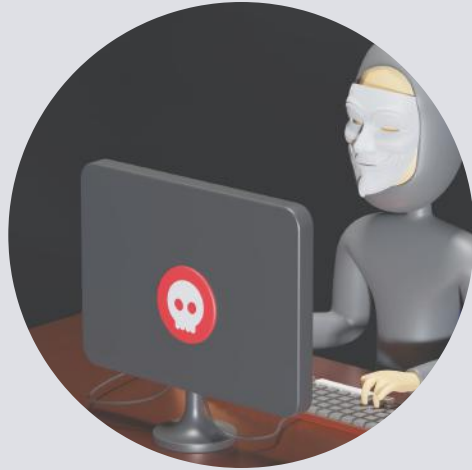


Phone System

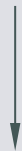
Tracking phone calls and
generating reports is a
challenge with current system



Public Education Campaign



International Fraud Awareness Week



Launched social media videos and made public appearances on Univision and Telemundo to educate the public on how to prevent notario fraud



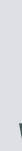
Online Complaint Form



Restructured the complaint form and resolved issued discovered as part of PTL inquiries



Radio and Social Media Campaign



Radio and social media campaign to inform Spanish speakers in CA about the State Bar, services offered, and how to prevent fraud



Public Education Campaign



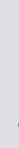
Public Education



Educated the public on how to verify attorneys license status, and how to file complaints



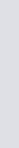
Spanish Social Media Campaign



PTL partnered with communications on their Spanish social media campaign



Television Appearances



Conducted multiple television media appearances educating the public on how to file complaints



Results from Social Media and Radio Campaigns

Campaign ran in San Diego and Central Valley from April 10, 2023—May 21, 2023.

	Intake (OCTC) Spanish and LRS Spanish
4/10/2021–4/30/2021	64 (4 Spanish Public Service Representatives)
4/10/2022–4/30/2022	76 (6 Spanish Public Service Representatives)
4/10/2023–4/30/2023	457 (4 Spanish Public Service Representatives)
	Intake (OCTC) Spanish & LRS Spanish (IVR)
5/1/2021–5/31/2021	47 (3 Spanish Public Service Representatives)
5/1/2022–5/31/2022	74 (6 Spanish Public Service Representatives)
5/1/2023–5/31/2023	394 (2 Spanish Public Trust Representatives)



A Look Ahead...

- Full execution of a Public Education Campaign
 - Continued expansion of PTR duties
 - Establishing a complaint diversion option
 - return of client files
 - failure to communicate
 - First annual report
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