

<b>HUMAN RESOURCES MEMORANDUM 19-021</b>		DATE ISSUED: 12/20/2019
SUBJECT: <b>BAR ASSOCIATION DUES REIMBURSEMENT</b>		REFERENCE: CalHR 2007
TO: DGS Managers, Supervisors, Employee Resource Liaisons and Attendance Clerks		SUPERCEDES: <i>HR Memo 18-021</i>

**PLEASE ENSURE THAT THIS INFORMATION IS SHARED WITH YOUR EMPLOYEES**

**Purpose**

The purpose of this memorandum is to inform employees of the 2020 State Bar membership dues reimbursement and related provisions.

**Deadline**

The annual membership fee for active members is payable on or before February 3, 2020.

**2020 Reimbursement**

Departments are required to pay **\$497** of the 2020 State Bar membership fee of \$544 for employees in Bargaining Unit 2 and affiliated excluded employees if State Bar membership is required as a condition of employment.

The State does not pay:

- The \$5 contribution for the Lobbying and Related Activities option, line 20 of the State Bar coupon;
- The \$2 contribution for the Elimination of Bias option, line 21 of the State Bar coupon;
- The \$40 contribution for the Legal Services Assistance option, line 22 of the State Bar coupon;
- Optional donations for Access to Justice, California Change Lawyers, or California Supreme Court Historical Society (CSCHS); nor
- Penalties resulting from late payment of dues, unless the state is responsible for the late payment

For employees who work less than full time, or less than one year, the department may prorate the reimbursement.

**Local or Specialty Bar Dues**

The State will pay up to \$100 annually for job-related local or specialty bar dues, if State Bar membership is required as a condition of employment. The employee may be reimbursed for more than one local or specialty bar as long as the total reimbursement does not exceed \$100.

Excluded employees may be reimbursed for job-related local or specialty bar dues at the discretion of the department. In such cases, the department also determines the reimbursable amount. The department may prorate the amount for employees working less than full time.

**Reimbursement when State Bar Membership is not Required**

For rank-and-file employees in Bargaining Unit 2 who are **not** required to be members of the State Bar as a condition of employment, the department may provide one of the following:

- a. Reimbursement of the **\$497** portion of State Bar dues described in Question 1 (the reimbursable amount for an “inactive” membership would be **\$136**); **or**
- b. Two (2) Professional Development Days (PDD), per Unit 2, Memorandum of Understanding, Article XIII, Section 13.7B.

Option “a” is available only for employees who are eligible to be State Bar members. Unit 2 employees who are not attorneys are entitled to only option “b”.

The department may prorate PDD for employees who work less than full time and/or less than a full year.

PDD must be requested and approved in the same manner as vacation or annual leave.

### **Reimbursement for Excluded Employees**

Excluded employees are entitled to reimbursement for up to \$100 annually for membership dues of a professional organization or for a job-related professional license fee that is directly related to the employee’s professional discipline.

### **Reimbursement for California Rules of Court, rule 9.9.5 (Attorney Fingerprinting)**

Departments shall provide reimbursement of the \$49 processing fee for the Department of Justice (DOJ) and Federal Bureau of Investigation (FBI) review, and up to \$35 for vendor fees incurred due to the requirements of California Rules of Court, rule 9.9.5 (Attorney Fingerprinting) for employees in Bargaining Unit 2 and affiliated excluded employees if State Bar membership is required as a condition of employment.

### **Methods of Reimbursement/Payment of Bar Dues**

Direct payment: The department may pay membership fees directly to the State Bar, following the procedures outlined below. However, use the reimbursement method (described in the Reimbursement section below), not direct payment, for employees choosing to pay any optional fees (itemized on lines 10-16 of the membership dues statement).

- a. No later than January 13, 2020 (which is approximately three weeks before the February 3, 2020 payment deadline), employees must provide the original remittance (coupon) portion of their membership dues statement to the person designated by the department to handle payment of bar dues. Lines 10 through 16 must show “0” to indicate that no optional payments are included, Line 20 (“Lobbying and Related Activity”) must show that \$5 has been deducted, Line 21 (“Elimination of Bias”) must show that \$2 has been deducted, and Line 22 (“Legal Services Assistance”) must show that \$40 has been deducted.
- b. Departments will need to create an Administrator's profile by using the login button on the upper right side of the [State Bar of California website](#) home page to create an Administrator's profile. Any questions on this process should be directed to the State Bar at AgencyBilling@calbar.ca.gov or (888) 800-3400.
- c. The administration should upload a spreadsheet with their attorney’s names and Bar Numbers. The system will generate the billing information for each attorney, including any current section memberships. Please make any changes necessary, including deleting any optional deductions not paid by the department as listed above.
- d. Payment may be made online via bank account (ACH) or credit card. If online payment is not an option for your department, print an invoice that can be submitted with a check.

- e. If paying by check, please prepare one check for dues and section fees, payable to “California State Bar.” Send the check, list, and invoice generated in the Agency Billing process in one envelope addressed to:  
State Bar of California  
Attention: Membership Services  
P.O. Box 842142  
Los Angeles, CA 90084-2142
  
- f. If the department receives an employee’s membership dues statement after January 13, 2020, the department still has the option to pay the dues directly, or it may reimburse the employee, as described below.

Reimbursement: The Department may reimburse individual employees. Employees who request reimbursement must include proof of payment, a copy of their annual membership dues statement, and a copy of their membership card.

### **Additional Information**

The information in this memorandum is based in part on Article 13.7 of the Bargaining Unit 2 contract and [Title 2, sections 599.921](#) of the California Code of Regulations.

### **Questions**

If you have further questions, please direct them to your assigned Labor Relations Specialist.

**AMY APLEGATE**, Personnel Officer  
Office of Human Resources

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