

HUMAN RESOURCES MEMORANDUM 13-034		DATE ISSUED: December 27, 2013
SUBJECT: Bar Association Dues Reimbursement		REFERENCE: PML 2013-045
TO: Managers, Supervisors, Personnel Liaisons and Attendance Clerks		SUPERSEDES: <i>HR Memo 12-009</i>

PLEASE ENSURE THAT THIS INFORMATION IS SHARED WITH YOUR EMPLOYEES

Purpose The purpose of this memorandum is to inform employees of the 2014 State Bar membership dues reimbursement and related provisions.

Deadline **The State Bar's deadline for payment of 2014 membership dues is February 3, 2014.**

Reimbursement Departments are required to pay **\$380** of the 2014 State Bar membership fee of \$420 for Bargaining Unit 2 employees and affiliated excluded employees if State Bar membership is required as a condition of employment.

The State does not pay:

- The **\$10** portion that funds the State Bar's **Legislative Activity (\$5)** and **Bar Relations and Elimination of Bias (\$5)** with voluntary bar associations, lines 21 and 22 of the State Bar coupon;
- The **\$30** contribution for the **Legal Services Assistance** option, line 23 of the State Bar coupon;
- Optional donations to the Conference of Delegates of California Bar Associations, Foundation of the State Bar, or the California Supreme Court Historical Society; 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, your 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 your department. In such cases, your 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, your department may provide one of the following:

- a. Reimbursement of the **\$380** portion of State Bar dues described on the previous page (the reimbursable amount for an “inactive” membership would be **\$145**); **or**
- b. Two (2) Professional Development Days (PDD), per Unit 2, Memorandum of Understanding, Article XIII, Section 13.7., B.

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”.

Your 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.

Methods of Reimbursement

Direct payment: Your 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 19-23 of the membership dues statement).

- a. No later than January 10, 2014 (which is approximately three weeks before the February 3, 2014 payment deadline), employees must provide the original remittance (coupon) portion of their membership dues statement to the person designated by your department to handle payment of bar dues. Lines 19 and 20 must show “0” to indicate that no optional payments are included, and line 21 (“Legislative Activity”) and line 22 (“Bar Relations and Elimination of Bias”) must show that \$5 has been deducted for each of these items. Line 23 (“Legal Services Assistance”) must show that \$30 has been deducted.
- b. Prepare a list of employees for whom the department is paying State Bar dues, batch the coupons, and prepare one check for dues and section fees, payable to “California State Bar.” Send the check, list, and batched coupons together in one envelope addressed to:

State Bar of California
Attention: Membership Services
180 Howard Street
San Francisco, CA 94105-1639

Methods of Reimbursement Continued

- c. If your department receives an employee's membership dues statement after January 10, 2014, the department still has the option to pay the dues directly, or it may reimburse the employee, as described below.

Reimbursement: Your 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.

Affiliated Excluded Employee Reimbursements

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.

Questions

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.

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

ANGIE BOLDRINI, Personnel Officer
Office of Human Resources

AB:tbw