



The State Bar *of California*

2024 Legislative Priorities & Legislative Proposals

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Board of Trustees July 18–19, 2024



Agenda

1. Update to Affirmative Legislative Proposal re: Earmark of Legal Services Funding for Fellowships
2. Position on SB 940 (Umberg) – Certification of ADR Firms, Providers, and Practitioners
3. Discussion of Fee Increase Authorized in AB 3279 and State Bar Position



Earmark Funding for Summer Fellowships

- \$45 contribution as part of licensee fees for legal services (opt out)
- \$5 earmarked for past 2 years for summer fellowships at IOLTA funded organizations
- Broad community support to continue that funding for an additional 5 years
- Now also broad support to increase amount dedicated from \$5 to \$10



State Bar Position on Pending Legislation: SB 940 (Umberg)



**Program to
allow ADR firms,
providers, and
practitioners to
seek State Bar
certification**



**Creation of the
program is
mandatory;
participation in
the program is
voluntary**



**Minimum
criteria for
certification
enumerated in
the bill**



**Bar to develop
additional
criteria, incl
levels / tiers
(modeled after
DEI leadership
seal)**



**State Bar to
assess fees to
cover the
reasonable
costs, including
start up costs**



Comparison of Fee Increase Request & AB 3279

Maintaining Public Protection




Lease costs and staffing **levels** underfunded






No annual adjustment

- Lease costs
- Contractual obligations
- Staffing levels

Total

State Bar Need	
\$21	
\$35	
\$39	
\$95	







Current Bill	
\$15	
\$62	
	
\$77	

Comparison of Fee Increase Request & AB 3279

Improving Public Protection

Growing case backlogs in the attorney discipline system.



	State Bar Need	Current Bill
 OCTC Case Processing	\$15.25	
 Diversion Program	\$5.50	\$5.50
 Complaint Review Unit	\$3.50	
 Client Trust Account Protection Program	\$5.75	\$5.50
Total	\$30.00	\$11.00



Essential Requirements for Support Position



Full funding for all maintaining public protection elements?



Funding of all items requested?



Elimination of need to increase vacancy rate?



Authorization to use portion of CSF reserves and future CSF collection revenue for IT investments in modernization to face a future with fewer staff



FYI: Other Issues in Progress

- Amendments to initiate enhanced collections activity
- Modernize LRS certification
- Use of Justice Gap Fund and legal services donations for urgent or emerging issues
- CTAPP (bank reporting and related issues)
- Timing of bar exam evaluation studies
- Technical amendments



Questions

