

**Notice of Regular Monthly Meeting of
Marin County Law Library Board of Trustees
Marin County Law Library
20 North San Pedro Road, Suite 2007
Conference Room
San Rafael, CA 94903**

Tuesday, July 9, 2024, at 5:15 P.M.

Agenda

Call to Order*

1. Consent Calendar

1.1 June 2024 Minutes

1.2 June 2024 Special Meeting Minutes

1.2 June 2024 Warrants

2. Open Time for Public Expression

3. Financial Report

4.1 Filing Fee Schedule – June 2024

4.2 Actuals (Income and Expenses) – June 2024

4.3 Journals and Reconciliation –June 2024

4. Librarian's Report

5. Committee Reports

5.1 Civic Engagement

6. Old Business

6.1 Discussion and Action: Discussion and Action re Approval of ADP Retirement Plan

6.2 Discussion and Action: Discussion and Action re Budget Planning for Fiscal Year 2024-2025

7. New Business

7.1 Discussion and Action: Discussion and Action re Election for Board President and Board Vice-President

7.2 Discussion and Action: Discussion and Action re Approval of Library Policy – Time Limits on Computer Usage

7.3 Discussion and Action: Discussion and Action re Lawyers in the Library Usage and Waitlist

7.4 Discussion and Action: Discussion and Action re Approval of Electronic Resources Contract

7.5 Discussion and Action: Discussion and Action re Passport Services in Law Library

7.6 Discussion and Action: Discussion and Action re Human Resources in Law Library

8. Board Members' Suggestions for Next Month's Agenda

9. Adjournment

Upcoming Events FYI:

Lawyers in the Library Virtual Program – 07/11/2024

First Thursdays at the Law Library on Zoom – TBA

Deadline to Submit Reports for Board Meeting on 07/09/2024: 07/02/2024

* This meeting may be recorded as authorized by the Government Code.

If requested, pursuant to Government Code Section 54953.2, this agenda shall be made available in appropriate alternative formats to persons with a disability, as required by Section 202 of the Americans with Disabilities Act of 1990 (42 U.S.C. Section 12132), and the federal rules and regulations adopted in implementation thereof. To make a request for disability-related modification or accommodation, please contact (415) 473-4381 (Voice/TTY) or 711 for the California Relay Service or e-mail disabilityaccess@marincounty.org at least five working days in advance of the meeting.

A complete agenda packet is available at the front desk of the Marin County Law Library, on the Law Library's bulletin board, and on the Law Library website at www.marincountylawlibrary.org. It is also available 24/7 outside the ground floor lobby of the middle archway entrance to the Civic Center (the one allowing access to the Courts floor) at 3501 Civic Center Drive, San Rafael, CA 94903 at least 72 hours prior to the meeting.

Board of Trustees

PRESIDENT
Denise Bashline
Judicially Appointed

VICE PRESIDENT
Alexander Johnson, Esq.
Judicially Appointed

David J. Sutton, Esq.
Judicially Appointed

Abby Frost Lucha, Esq.
Judicially Appointed

Scott McDonald
Board of Supervisors Appointed

Stephen Richards
Law Library Director

20 North San Pedro Road
Suite 2007
San Rafael, CA 94903
415-472-3733 T
415-472-3729 F
www.marincountylawlibrary.org

**Minutes of Special Meeting of
Marin County Law Library Board of Trustees
Marin County Law Library
20 North San Pedro Road, Suite 2007
Conference Room
San Rafael, CA 94903**

Tuesday, June 27, 2024, at 4:30 P.M.

Present: Abby Lucha, Denise Bashline, David Sutton, Stephen Richards

Absent: Scott McDonald, Alexander Johnson

Also Present:

President Bashline called the meeting to order at 4:42 p.m.

1. Discussion and Action: Discussion and Action re Approval of Westlaw Patron Contract

- Discussion regarding the new Westlaw Patron contract occurred between one seat with the current subscription plan or two seats at a lesser plan for one year.
- Trustee Sutton made a motion to approve the Westlaw contract approving the one seat with the current subscription plan for June 2024 to June 2025. President Bashline seconded the motion.

Vote: Motion carried 3-0

AYES: President Bashline, Trustee Lucha, and Trustee Sutton

ABSENT: Vice President Johnson, and Trustee McDonald

2. Adjournment

- President Bashline moved to adjourn the meeting. Trustee Lucha seconded the motion.

Vote: Motion carried 3-0

AYES: President Bashline, Trustee Lucha, and Trustee Sutton

ABSENT: Vice President Johnson, and Trustee McDonald

3. The meeting was adjourned at 5:02 PM.

4. Next Regular Board Meeting: July 9th, 2024

Respectfully submitted,

Denise Bashline
President, Board of Trustees

Stephen Richards
Ex-Officio Secretary

Board of Trustees

PRESIDENT
Denise Bashline
Judicially Appointed

VICE PRESIDENT
Alexander Johnson, Esq.
Judicially Appointed

David J. Sutton, Esq.
Judicially Appointed

Abby Frost Lucha, Esq.
Judicially Appointed

Scott McDonald
Board of Supervisors Appointed

Stephen Richards
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**Minutes of Regular Monthly Meeting of
Marin County Law Library Board of Trustees
Marin County Law Library
20 North San Pedro Road, Suite 2007
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San Rafael, CA 94903**

Tuesday, June 18, 2025, at 5:15 P.M.

Present: Scott McDonald, Alex Johnson, Abby Lucha, Denise Bashline, David Sutton, Stephen Richards

Absent:

Also Present:

President Bashline called the meeting to order at 5:16 p.m.

1. Consent Calendar

a. May 2024 Minutes

- See Attached

- Trustee Sutton made the motion to approve the May 2024 minutes. Trustee Lucha seconded the motion.

Vote: Motion carried 4-0

AYES: President Bashline, Vice President Johnson, Trustee Lucha, and Trustee Sutton

ABSENT: Trustee McDonald

b. June 2024 Warrants

- See Attached
- Trustee Sutton made the motion to approve the May 2024 minutes. Trustee Lucha seconded the motion.

Vote: Motion carried 4-0

AYES: President Bashline, Vice President Johnson, Trustee Sutton, and Trustee Lucha

ABSENT: Trustee McDonald

2. Public Expression

- Public expression was given regarding issues printing out the agenda and its materials.
- In addition, public expression was given about requesting information regarding how states could allow exceptions for law libraries to provide legal advice.

3. Financial Report

a. Filing Fee Schedule – May 2024

- See Attached

b. Actuals (Income and Expenses) – May 2024

- See Attached

c. Journals and Reconciliation – May 2024

- Payroll journals were behind by one pay periods, but soon to be caught up.
- Previous bills were paid off that were missed before.

4. Librarian's Report

- Status update for the library was given by the librarian including librarian's vacation and trip to Chicago for the annual professional association conference and establishing partnership with HICAP (Health Insurance Counseling & Advocacy Program).

5. Committee Reports

a. Civic Engagement

- Discussion occurred regarding the issue relating to how out of date the information on the guide provided by Marin Health and Human Services has caused issues and possibly helping Marin Health and Human Services to keeping the information on the guide up to date.

6. Old Business

- a. Discussion and Action: Discussion and Action re Implementation of Electronic Payment System – FIS Solutions
- Discussion occurred about accepting the terms for the Electronic Payment System contract from FIS Solutions stating that the charge on top of the initial price to the patron would be \$1.50 minimum or 2.35% of the transaction using a credit or debit card.
 - Trustee Sutton made the motion to accept the contract with the stated terms. Vice President Johnson seconded the motion.

Vote: Motion carried 5-0

AYES: President Bashline, Vice President Johnson, Trustee McDonald, Trustee Lucha, and Trustee Sutton

ABSENT:

b. Discussion and Action: Discussion and Action re Approval of Westlaw Patron Contract

- See Attached
- Discussion occurred regarding the approval of the Westlaw Patron Contract where two proposals were presented including (1) keeping the Westlaw Patron Contract with the West physical books or (2) canceling the Westlaw Patron Contract and replacing with a contract with LexisNexis and keeping the West print books.
- President Bashline made the motion to cancel the Westlaw Patron Contract to replace with a contract with LexisNexis and keep the West print material. Trustee Sutton seconded the motion.

Vote: Motion carried 5-0

AYES: President Bashline, Vice President Johnson, Trustee McDonald, Trustee Lucha, and Trustee Sutton

ABSENT:

c. Discussion and Action: Discussion and Action re Budget Planning for Fiscal Year 2024-2025

- See Attached
- Discussion occurred about the upcoming deficit due to not receiving funding that was provided in earlier years and over predicting income sources such as passport services and possible funding from state. Also, discussion occurred about the need to replace computer systems for installation of Windows operating system and raising wages for the employees. The final budget is to be presented at the July meeting.
- Trustee McDonald made the motion to purchase (1) new computer. Trustee Sutton seconded the motion.

Vote: Motion carried 5-0

AYES: President Bashline, Vice President Johnson, Trustee McDonald, Trustee Lucha, and Trustee Sutton

ABSENT:

- Vice President Johnson made the motion to have the CEB print publications purchased biennially. Trustee Lucha seconded the motion.

Vote: Motion carried 5-0

AYES: President Bashline, Vice President Johnson, Trustee McDonald, Trustee Lucha, and Trustee Sutton

- Vice President Johnson made the motion to raise employee wages by five percent (5%). President Bashline seconded the motion.

Vote: Motion carried 5-0

AYES: President Bashline, Vice President Johnson, Trustee McDonald, Trustee Lucha, and Trustee Sutton

7. New Business

a. Discussion and Action: Discussion and Action re Approval of State Fund Insurance Policy

- Discussion occurred about the approval of the State Fund Insurance Policy including the price for the policy.
- Vice President Johnson made the motion to approve the State Fund Insurance Policy. Trustee Lucha seconded the motion.

Vote: Motion carried 5-0

AYES: President Bashline, Vice President Johnson, Trustee McDonald, Trustee Lucha, and Trustee Sutton

ABSENT:

b. Discussion and Action: Discussion and Action re Approval of ADP Retirement Plan

- See Attached
- Discussion occurred about approval of a retirement plan from ADP including the set-up and maintenance cost.
- President Bashline made the motion to table this discussion for more information to be brought on the topic. Trustee Johnson seconded the motion.

Vote: Motion carried 5-0

AYES: President Bashline, Vice President Johnson, Trustee McDonald, Trustee Lucha, and Trustee Sutton

ABSENT:

c. Discussion and Action: Discussion and Action re Approval of 20-minute Paid Break

- Discussion occurred about extending the paid break period from ten (10) paid minutes to twenty (20) paid minutes for employees who work up to six (6) hours.
- Trustee Sutton made the motion to extend the paid break period from ten (10) paid minutes to fifteen (15) paid minutes for employees who work up to six (6) hours. Trustee McDonald seconded the motion,

Vote: Motion carried 5-0

AYES: President Bashline, Vice President Johnson, Trustee McDonald, Trustee Lucha, and Trustee Sutton

ABSENT:

8. Board Members' Suggestions for Next Month's Agenda

- a. Board gave suggestions for next month's agenda.
- b. Trustee Lucha made the motion to move the July meeting to July 9th. Trustee McDonald seconded the motion.

Vote: Motion carried 5-0

AYES: President Bashline, Vice President Johnson, Trustee McDonald, Trustee Lucha, and Trustee Sutton

9. Adjournment

- Trustee Sutton moved to adjourn the meeting. Trustee Lucha seconded the motion.

Vote: Motion carried 5-0

AYES: President Bashline, Vice President Johnson, Trustee McDonald, Trustee Lucha, and Trustee Sutton

ABSENT:

10. The meeting was adjourned at 6:48 PM.

11. Next Regular Board Meeting: July 9, 2024

Respectfully submitted,

Denise Bashline
President, Board of Trustees

Stephen Richards
Ex-Officio Secretary

Marin County Law Library July 2024 WARRANTS

Item No.	Vendor	Current Amount Due	Suggested Payment
1	U.S. Bank (Sonic.net, USPS, Quill, Jotform, United)	\$ 1,120.18	\$ 1,120.18
2	Thomson Reuters (Westlaw Patron)	\$ 2,104.25	\$ 2,104.25
3	Thomson Reuters (West Print)	\$ 1,257.00	\$ 1,257.00
4	Matthew Bender & Co, Inc.	\$ 1,411.54	\$ 1,411.54
5	LexisNexis	\$ 501.00	\$ 501.00
6	CEB Print	\$ 408.33	\$ 408.33
7	SPTJ Consulting, Inc. (May 2024)	\$ 1,225.00	\$ 1,225.00
8	Kyocera Copier	\$ 415.87	\$ 415.87
9	ADP Payroll	\$ 152.35	\$ 152.35
10	CEB Online	\$369.50	\$ 369.50
11	Comcast Business	\$280.00	\$ 280.00
12	NCLC	\$ 2,528.00	\$ 2,528.00
13			\$ -
14		\$ -	\$ -
15		\$ -	\$ -
16		\$ -	\$ -
	Totals:	\$ 11,773.02	\$ 11,773.02

Salary Expenses: \$8,261.27

Total Expenses: \$20,034.29

Total Revenue Available:	\$ 215,905.00
Total Expenditures (proposed):	\$ 20,034.29
Remaining Cash Balance:	\$ 195,870.71

MCLL COURT FILING FEE REVENUE

FISCAL YEAR	2011/2012	2012/2013	2013/2014	2014/2015	2015/2016	2016/2017	2017/2018	2018/2019	2019/2020	2020-2021	2021/2022	2022/2023	2023/2024
MONTH													
JULY	20,540.55	18,553.72	17,112.03	15,325.97	13,394.41	14,436.61	15,423.76	15,732.59	15,504.68	382.26	9,382.59	14,900.57	13,861.08
AUGUST	21,718.70	18,993.11	15,217.06	16,919.18	15,889.49	15,213.24	16,073.88	14,722.11	14,041.18	16,001.89	22,888.81	12,847.78	17,627.93
SEPT.	18,661.46	17,773.96	15,432.17	16,074.18	14,699.61	12,609.37	14,326.47	14,633.61	17,124.24	10,247.04	13,414.73	13,630.59	14,287.00
OCTOBER	19,906.84	19,163.96	15,217.59	14,560.64	13,726.42	14,303.82	17,267.94	14,745.05	13,045.80	13,344.67	18,388.13	12,059.80	15,257.27
NOVEMBER	18,609.36	14,605.25	13,983.15	14,926.06	13,529.51	14,026.49	14,651.51	11,844.36	14,564.37	9,890.70	15,930.29	14,023.74	13,489.86
DECEMBER	19,736.75	17,096.40	16,688.32	13,698.16	14,161.61	14,087.85	13,988.55	13,697.15	14,025.18	9,502.63	14,865.21	14,003.50	13,575.19
JANUARY	18,939.59	16,072.57	14,588.83	12,812.89	12,802.25	12,149.23	13,808.54	13,949.41	14,580.66	9,573.31	14,193.66	11,628.35	13,217.12
FEBRUARY	20,767.28	15,160.56	14,836.86	13,448.58	12,273.72	13,625.45	12,072.28	12,332.59	14,227.45	15,886.80	10,942.59	11,673.64	12,816.28
MARCH	25,481.90	17,544.43	15,218.51	12,840.74	13,942.25	12,325.32	14,378.55	15,424.33	14,612.20	9,205.48	10,184.15	12,713.48	13,437.83
APRIL	10,562.85	15,398.28	14,144.44	13,292.85	13,097.15	14,099.42	13,045.95	13,634.85	14,828.26	11,416.60	10,927.55	11,817.58	13,719.30
MAY	17,793.36	17,385.67	15,321.18	14,594.61	15,925.91	14,977.96	13,800.05	13,546.55	8,031.24	16,402.85	15,609.32	12,599.17	15,561.77
JUNE	17,892.17	16,637.38	14,850.97	16,095.27	16,237.00	12,928.62	14,252.53	15,796.62	11.62	11,634.46	12,125.83	12,018.35	12,234.41
ANNUAL TOTALS	230,610.81	204,385.29	182,611.11	174,589.13	169,679.33	164,783.38	173,090.01	170,059.22	154,596.88	133,488.69	168,852.86	153,916.55	169,085.04

Each current month's filing fee revenue represents income generated from the Court filings of two months ago. January revenue comes from November filings, etc.

MARIN COUNTY LAW LIBRARY
CURRENT PERFORMANCE AND NEXT YEAR FISCAL BUDGET
Prepared as of 7/5/2024

Munis Fund No: 3400																				
Program: 7960																				
Subprogram: 7961																				
	Jul 2023 <u>Act</u>	Aug 2023 <u>Act</u>	Sep 2023 <u>Act</u>	Oct 2023 <u>Act</u>	Nov 2023 <u>Act</u>	Dec 2023 <u>Act</u>	Jan 2024 <u>Act</u>	Feb 2024 <u>Act</u>	Mar 2024 <u>Act</u>	Apr 2024 <u>Act</u>	May 2024 <u>Act</u>	Jun 2024 <u>Act</u>	Full Year 2023-2024 <u>Act/Fcst</u>	Full Year 2023-2024 <u>BUDGET</u>	Full Year 2023-2024 <u>Variance</u>	<u>Key Performance Notes</u>	Full Year 2024 - 2025 <u>Projected</u>	Net Chg. From Prior Yr	<u>Increase/Decrease Key Notes</u>	
REVENUE																				
Fillings	13,861	17,628	14,287	15,257	13,490	13,575	13,217	12,816	13,438	13,719	15,562	12,234	169,085	145,000	24,085	Started program Feb '23	-	(169,085)		
Passports	1,070	210	1,270	490	945	945	1,085	1,645	1,155	805	1,085	1,015	11,720	20,000	(8,280)		-	(11,720)	Started charging Feb '23	
All Other	69	10,405	3,502	134	4,062	334	349	498	628	111	619	143	20,853	87,568	(66,715)		-	(20,853)	Assumes State Funding of \$62K	
TOTAL REVENUE	15,000	28,243	19,059	15,881	18,497	14,854	14,651	14,959	15,220	14,636	17,266	13,392	201,658	252,568	(50,910)		-	(201,658)		
EXPENSES																				
Direct Staffing Expense	8,427	8,460	9,825	7,884	10,392	6,471	9,399	9,103	14,212	7,762	8,689	8,261	108,886	130,768	21,882		-	(108,886)		
Insurance	-	1,589	-	-	-	1,145	1,414	-	-	-	-	-	4,148	5,600	1,452		-	(4,148)		
Membership/Prof Dev	-	-	-	-	-	-	-	845	-	-	1,033	1,723	3,601	5,648	2,047		-	(3,601)		
Office Expense	303	400	69	442	416	94	351	267	-	89	365	88	2,884	3,000	116		-	(2,884)		
Postage	153	97	52	105	106	152	136	356	-	88	176	88	1,508	-	(1,508)		-	(1,508)		
Projects	-	-	150	328	-	-	-	500	-	170	-	348	1,496	2,500	1,004		-	(1,496)		
Professional Svc/ (ADP)	148	155	233	155	294	248	248	248	233	155	233	233	2,580	-	(2,580)		1,852	(728)		
Copy Machines	-	400	-	-	491	416	416	416	416	416	416	416	3,802	2,332	(1,470)		-	(3,802)		
Telephone/Internet	792	98	784	414	16,540	2,180	1,258	661	546	2,814	1,318	298	27,703	13,000	(14,702)		-	(27,703)	Non-recurring network Upgrade Expense	
Publications	9,038	4,606	5,587	4,967	5,172	6,062	6,292	6,259	6,258	5,013	6,265	8,580	74,098	66,000	(8,098)		-	(74,098)		
Bookings	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-		-	-		
TOTAL EXPENSE	18,862	15,804	16,698	14,295	33,411	16,767	19,513	18,656	21,664	16,506	18,494	20,034	230,705	228,848	(1,857)		1,852	(228,853)		
NET GAIN/(LOSS)	(3,862)	12,439	2,361	1,586	(14,915)	(1,913)	(4,863)	(3,696)	(6,443)	(1,871)	(1,228)	(6,642)	(29,047)	23,720	52,766		(1,852)	27,195		
FUND BALANCE																				
Unrestricted Fund Balance	235,170	231,308	243,747	246,108	247,694	232,779	230,867	226,004	222,307	215,864	213,993	212,765	235,170				206,124			
Income/Loss (from above)	(3,862)	12,439	2,361	1,586	(14,915)	(1,913)	(4,863)	(3,696)	(6,443)	(1,871)	(1,228)	(6,642)	(29,047)				(1,852)			
Total Unrestricted Fund Bal	231,308	243,747	246,108	247,694	232,779	230,867	226,004	222,307	215,864	213,993	212,765	206,124	206,124				204,272			

CURRENT YEAR - Key Messages

> Expected expense of \$233K, which assumes addt'l State funding of \$62K. If not recieved a deficit will occur of \$62K

> Yr-over-Yr remains flat, however there is a shift between of spend between Network

NEXT YEAR - Key Messages

FY 2023-2024 Profit & Loss Statement

July 2024 Board Meeting

-----Input Actual and Forecasts in this section-----
manually move the Blue Bar to align at intersection of Act/Fcst

		Prev FY	FISCAL YEAR 7/01/2023 through 06/30/20							
		Jul - Jun '22-'23	July 2023	Aug 2023	Sep 2023	Oct 2023	Nov 2023	Dec 2023	Jan 2024	Feb 2024
		Act	Act	Act	Act	Act	Act	Act	Act	Act
REVENUE:										
451970	Filings	\$ 153,730	\$ 13,861	\$ 17,628	\$ 14,287	\$ 15,257	\$ 13,490	\$ 13,575	\$ 13,217	\$ 12,816
441115	Interest	\$ -	\$ -	\$ -	\$ 2,121	\$ -	\$ 2,924	\$ -	\$ -	\$ -
462650	Photocopies	\$ 1,619	\$ 60	\$ 8	\$ 415	\$ 83	\$ -	\$ 281	\$ 291	\$ 125
470410	Book Sales	\$ 118	\$ 9	\$ -	\$ 454	\$ -	\$ 390	\$ 16	\$ 45	\$ 315
470330	Donations	\$ 35	\$ -	\$ -	\$ 24	\$ 51	\$ -	\$ -	\$ -	\$ -
470110	Fax/Paper Sales	\$ 49	\$ -	\$ -	\$ 18	\$ -	\$ -	\$ 32	\$ -	\$ -
441215	Conference Room	\$ 215	\$ -	\$ -	\$ 470	\$ -	\$ -	\$ -	\$ -	\$ -
462610	Proctoring	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
461810	Miscellaneous Receipts	\$ 72,417	\$ -	\$ 10,397	\$ -	\$ -	\$ 748	\$ 5	\$ 13	\$ 58
461710	Classes/Workshops/MCLE	\$ 83	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
462610	Passport Services	\$ 5,745	\$ 1,070	\$ 210	\$ 1,270	\$ 490	\$ 945	\$ 945	\$ 1,085	\$ 1,645
480210	Transfers In	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Revenue Total:		\$ 234,011	\$ 15,000	\$ 28,243	\$ 19,059	\$ 15,881	\$ 18,497	\$ 14,854	\$ 14,651	\$ 14,959
EXPENSE:										
Staff										
511110	Librarian	\$ 55,560	\$ 4,461	\$ 4,468	\$ 6,455	\$ 4,656	\$ 4,835	\$ 4,656	\$ 4,923	\$ 4,673
511220	Extra Hire	\$ 35,159	\$ 2,920	\$ 3,354	\$ 2,591	\$ 2,625	\$ 3,341	\$ 1,284	\$ 3,642	\$ 2,241
515110	Social Security	\$ 5,627	\$ 423	\$ 485	\$ 623	\$ 489	\$ 507	\$ 430	\$ 531	\$ 429
515115	Medicare	\$ 1,317	\$ 99	\$ 113	\$ 146	\$ 114	\$ 119	\$ 101	\$ 124	\$ 100
513215	Health Benefits	\$ 11,102	\$ -	\$ -	\$ -	\$ -	\$ 1,570	\$ -	\$ -	\$ 1,570
514110	Workers Compensation	\$ 530	\$ 493	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
515120	Unemployment Insur.	\$ 584	\$ 31	\$ 40	\$ 10	\$ -	\$ 21	\$ -	\$ 180	\$ 91
Staff Subtotal:		\$ 109,879	\$ 8,427	\$ 8,460	\$ 9,825	\$ 7,884	\$ 10,392	\$ 6,471	\$ 9,399	\$ 9,103
ADMINISTRATIVE EXPENSE										
Insurance										
	USLI	\$ 1,328	28% \$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 1,414	\$ -
	Complete Equity Markets	\$ 1,589	33% \$ -	\$ 1,589	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
	Hartford	\$ 1,910	40% \$ -	\$ -	\$ -	\$ -	\$ -	\$ 1,145	\$ -	\$ -
521610	Insurance Subtotal:	\$ 4,827	\$ -	\$ 1,589	\$ -	\$ -	\$ -	\$ 1,145	\$ 1,414	\$ -
522210	Memberships/Prof Develop.									
	Placeholder	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
	CCCLL	\$ 840	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 50
	MCBA	\$ 100	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
	MLCPA	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
	NOCALL	\$ 150	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
	AALL	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 795
MBRP/Prof Dev Subtotal:		\$ 1,090	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 845
522410	Office Expenses	\$ 1,620	\$ 303	\$ 400	\$ 69	\$ 442	\$ 416	\$ 94	\$ 351	\$ 267
522440	Postage	\$ 968	\$ 153	\$ 97	\$ 52	\$ 105	\$ 106	\$ 152	\$ 136	\$ 356
522310	Projects	\$ 1,779	\$ -	\$ -	\$ 150	\$ 328	\$ -	\$ -	\$ -	\$ 500
522510	Professional Services (ADP Payroll)	\$ 1,846	\$ 148	\$ 155	\$ 233	\$ 155	\$ 294	\$ 248	\$ 248	\$ 248
522930	Copy Machines									
	DeLage Landen	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
	HiTech	\$ 192	\$ -	\$ -	\$ -	\$ -	\$ 491	\$ 416	\$ 416	\$ 416
	Marin Copier	\$ 213	\$ -	\$ 400	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Copy Machines Subtotal:		\$ 405	\$ -	\$ 400	\$ -	\$ -	\$ 491	\$ 416	\$ 416	\$ 416
521310	Tel/Internet									
	Sonic Email	\$ 335	1% \$ 18	\$ 18	\$ 18	\$ 18	\$ 18	\$ 18	\$ 18	\$ 33
	Comcast Internet	\$ 2,732	7% \$ 466	\$ 60	\$ 87	\$ 87	\$ 462	\$ 573	\$ 479	\$ 483
	AT&T Phone	\$ 1,627	4% \$ 133	\$ 19	\$ 154	\$ 134	\$ 136	\$ 281	\$ 148	\$ 145
	SPTJ	\$ 33,869	88% \$ 175	\$ -	\$ 525	\$ 175	\$ 15,925	\$ 1,309	\$ 613	\$ -
Tel/Internet Subtotal:		\$ 38,563	\$ 792	\$ 98	\$ 784	\$ 414	\$ 16,540	\$ 2,180	\$ 1,258	\$ 661
522815	Publications Upkeep									
	Other (CEB OnLaw, etc.)	\$ 342	1% \$ 1,598	\$ 851	\$ 907	\$ 871	\$ 871	\$ 880	\$ 871	\$ 1,111
	CEB	\$ 15,987	28% \$ 3,349	\$ -	\$ 1,240	\$ 620	\$ 423	\$ 325	\$ 564	\$ 1,708
	Lexis Nexis	\$ 6,004	11% \$ 730	\$ 351	\$ 36	\$ 72	\$ 475	\$ 1,452	\$ 1,452	\$ 36
	WestLaw	\$ 19,824	35% \$ 2,130	\$ 2,172	\$ 2,172	\$ 2,172	\$ 2,172	\$ 2,172	\$ 2,172	\$ 2,172
	West Publishing	\$ 14,584	26% \$ 1,232	\$ 1,232	\$ 1,232	\$ 1,232	\$ 1,232	\$ 1,232	\$ 1,232	\$ 1,232
Publications Subtotal:		\$ 56,741	\$ 9,038	\$ 4,606	\$ 5,587	\$ 4,967	\$ 5,172	\$ 6,062	\$ 6,292	\$ 6,259
522410	Book Binding	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Expense Total:		\$ 217,717	\$ 18,862	\$ 15,804	\$ 16,698	\$ 14,295	\$ 33,411	\$ 16,767	\$ 19,513	\$ 18,656
Net Gain/(Loss)		\$ 16,294	\$ (3,862)	\$ 12,439	\$ 2,361	\$ 1,586	\$ (14,915)	\$ (1,913)	\$ (4,863)	\$ (3,696)
Unrestricted Fund Balance										
		\$ 218,877	\$ 235,170	\$ 231,308	\$ 243,747	\$ 246,108	\$ 247,694	\$ 232,779	\$ 230,867	\$ 226,004

FY 2023-2024 Profit & Loss Statement

July 2024 Board Meeting

-----Input Actual and Forecasts in this section-----
manually move the Blue Bar to align at intersection of Act/Fcst

	Prev FY	FISCAL YEAR 7/01/2023 through 06/30/20							
	Jul - Jun '22-'23	July 2023	Aug 2023	Sep 2023	Oct 2023	Nov 2023	Dec 2023	Jan 2024	Feb 2024
Income/Loss (from above)	\$ 16,294	\$ (3,862)	\$ 12,439	\$ 2,361	\$ 1,586	\$ (14,915)	\$ (1,913)	\$ (4,863)	\$ (3,696)
Total Unrestricted Fund Bal	\$ 235,170	\$ 231,308	\$ 243,747	\$ 246,108	\$ 247,694	\$ 232,779	\$ 230,867	\$ 226,004	\$ 222,307

Footnotes

FY 2023-2024 Profit & Loss St:

July 2024 Board Meeting

		24					FY 2023-2024	
		Mar 2024	Apr 2024	May 2024	Jun 2024	TOTAL FY	Approved Projected Budget	(Over)/Under Plan
		Act	Act	Act	Act	Act/Fcst	Plan	Var
REVENUE:								
451970	Filings	\$ 13,438	\$ 13,719	\$ 15,562	\$ 12,234	\$ 169,085	\$ 145,000	\$ (24,085)
441115	Interest	\$ -	\$ -	\$ -	\$ -	\$ 5,045	\$ 450	\$ (4,595)
462650	Photocopies	\$ 128	\$ 81	\$ 48	\$ 68	\$ 1,587	\$ 1,100	\$ (487)
470410	Book Sales	\$ -	\$ 30	\$ 540	\$ 75	\$ 1,874	\$ 700	\$ (1,174)
470330	Donations	\$ 500	\$ -	\$ -	\$ -	\$ 575	\$ 3,000	\$ 2,425
470110	Fax/Paper Sales	\$ -	\$ -	\$ 2	\$ -	\$ 52	\$ 30	\$ (22)
441215	Conference Room	\$ -	\$ -	\$ 25	\$ -	\$ 495	\$ 100	\$ (395)
462610	Proctoring	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
461810	Miscellaneous Receipts	\$ -	\$ -	\$ 4	\$ -	\$ 11,224	\$ 62,188	\$ 50,964
461710	Classes/Workshops/MCLE	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
462610	Passport Services	\$ 1,155	\$ 805	\$ 1,085	\$ 1,015	\$ 11,720	\$ 20,000	\$ 8,280
480210	Transfers In	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Revenue Total:		\$ 15,220	\$ 14,636	\$ 17,266	\$ 13,392	\$ 201,658	\$ 232,568	\$ 30,910
EXPENSE:								
Staff								
511110	Librarian	\$ 6,747	\$ 3,991	\$ 4,707	\$ 4,673	\$ 59,246	\$ 63,000	\$ 3,754
511220	Extra Hire	\$ 4,974	\$ 3,120	\$ 3,309	\$ 2,962	\$ 36,362	\$ 49,000	\$ 12,638
515110	Social Security	\$ 670	\$ 441	\$ 497	\$ 473	\$ 5,997	\$ 6,944	\$ 947
515115	Medicare	\$ 157	\$ 103	\$ 116	\$ 111	\$ 1,403	\$ 1,624	\$ 221
513215	Health Benefits	\$ 1,570	\$ -	\$ -	\$ -	\$ 4,709	\$ 7,000	\$ 2,291
514110	Workers Compensation	\$ -	\$ 46	\$ -	\$ -	\$ 539	\$ 1,700	\$ 1,161
515120	Unemployment Insur.	\$ 95	\$ 61	\$ 60	\$ 43	\$ 630	\$ 1,500	\$ 870
Staff Subtotal:		\$ 14,212	\$ 7,762	\$ 8,689	\$ 8,261	\$ 108,886	\$ 130,768	\$ 21,882
ADMINISTRATIVE EXPENSE								
Insurance								
	USLI	\$ -	\$ -	\$ -	\$ -	\$ 1,414	\$ 2,572	\$ 1,158
	Complete Equity Markets	\$ -	\$ -	\$ -	\$ -	\$ 1,589	\$ 1,722	\$ 133
	Hartford	\$ -	\$ -	\$ -	\$ -	\$ 1,145	\$ 1,706	\$ 561
521610	Insurance Subtotal:	\$ -	\$ -	\$ -	\$ -	\$ 4,148	\$ 5,600	\$ 1,452
522210	Memberships/Prof Develop.	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
	Placeholder	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 4,500	\$ 4,500
	CCCLL	\$ -	\$ -	\$ -	\$ -	\$ 50	\$ 850	\$ 800
	MCBA	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 105	\$ 105
	MLCPA	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
	NOCALL	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 155	\$ 155
	AALL	\$ -	\$ -	\$ 1,033	\$ 1,723	\$ 3,551	\$ 38	\$ (3,513)
MBRP/Prof Dev Subtotal:		\$ -	\$ -	\$ 1,033	\$ 1,723	\$ 3,601	\$ 5,648	\$ 2,047
522410	Office Expenses	\$ -	\$ 89	\$ 365	\$ 88	\$ 2,884	\$ 3,000	\$ 116
522440	Postage	\$ -	\$ 88	\$ 176	\$ 88	\$ 1,508	\$ -	\$ (1,508)
522310	Projects	\$ -	\$ 170	\$ -	\$ 348	\$ 1,496	\$ 2,500	\$ 1,004
522510	Professional Services (ADP Payr)	\$ 233	\$ 155	\$ 233	\$ 233	\$ 2,580	\$ -	\$ (2,580)
522930	Copy Machines	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
	DeLage Landen	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 777	\$ 777
	HiTech	\$ 416	\$ 416	\$ 416	\$ 416	\$ 3,402	\$ 777	\$ (2,625)
	Marin Copier	\$ -	\$ -	\$ -	\$ -	\$ 400	\$ 777	\$ 377
Copy Machines Subtotal:		\$ 416	\$ 416	\$ 416	\$ 416	\$ 3,802	\$ 2,332	\$ (1,470)
Tel/Internet								
521310	Sonic Email	\$ 18	\$ 18	\$ 18	\$ 18	\$ 231	\$ 325	\$ 94
	Comcast Internet	\$ -	\$ 75	\$ 75	\$ 280	\$ 3,125	\$ 2,500	\$ (626)
	AT&T Phone	\$ 145	\$ 290	\$ -	\$ -	\$ 1,586	\$ 1,464	\$ (122)
	SPTJ	\$ 382	\$ 2,432	\$ 1,225	\$ -	\$ 22,761	\$ (1)	\$ (14,049)
Tel/Internet Subtotal:		\$ 546	\$ 2,814	\$ 1,318	\$ 298	\$ 27,703	\$ 13,000	\$ (14,702)
522815	Publications Upkeep	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
	Other (CEB OnLaw, etc.)	\$ 1,041	\$ 871	\$ 982	\$ 3,399	\$ 14,249	\$ 9,503	\$ (4,746)
	CEB	\$ 1,752	\$ 677	\$ 1,678	\$ 408	\$ 12,744	\$ 10,451	\$ (2,293)
	Lexis Nexis	\$ 36	\$ 36	\$ 177	\$ 1,412	\$ 6,263	\$ 6,562	\$ 299
	WestLaw	\$ 2,172	\$ 2,172	\$ 2,172	\$ 2,104	\$ 25,956	\$ 25,362	\$ (594)
	West Publishing	\$ 1,257	\$ 1,257	\$ 1,257	\$ 1,257	\$ 14,887	\$ 14,122	\$ (765)
Publications Subtotal:		\$ 6,258	\$ 5,013	\$ 6,265	\$ 8,580	\$ 74,098	\$ 66,000	\$ (8,098)
522410	Book Binding	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Expense Total:		\$ 21,664	\$ 16,506	\$ 18,494	\$ 20,034	\$ 230,705	\$ 228,848	\$ (1,857)
Net Gain/(Loss)		\$ (6,443)	\$ (1,871)	\$ (1,228)	\$ (6,642)	\$ (29,047)		
Unrestricted Fund Balance		\$ 222,307	\$ 215,864	\$ 213,993	\$ 212,765			

FY 2023-2024 Profit & Loss St:

July 2024 Board Meeting

	24					
	Mar 2024	Apr 2024	May 2024	Jun 2024	TOTAL FY	
Income/Loss (from above)	\$ (6,443)	\$ (1,871)	\$ (1,228)	\$ (6,642)		
Total Unrestricted Fund Bal	\$ 215,864	\$ 213,993	\$ 212,765	\$ 206,124		

Footnotes

FY 2023-2024 Approved Projected Budget	(Over)/Under Plan
---	-------------------



Your Money. Your Future.
employer.calsavers.com

What is CalSavers?

CalSavers is California's new retirement savings program for workers in the private sector who do not currently have a way to save at work. It's simple and completely voluntary for employees.

- Funded by employee savings (no employer fees or contributions)
- Employee participation is completely voluntary and they can opt in or out at any time
- Administered by a private-sector financial services firm and overseen by a public board chaired by the State Treasurer

Limited employer role

- Upload employee information to CalSavers
- Submit participating employee contributions to CalSavers via simple payroll deduction
- There are no fees for employers to facilitate the program and employers are not fiduciaries of the program



Meeting the CalSavers mandate

Each spring, CalSavers determines the mandate status for employers based on employee data that employers submitted to the Employment Development Department (EDD)* in the preceding year.

Employers with 5 or more employees

Employers will be required to join CalSavers by December 31 if they employed an average of five or more employees during the preceding calendar year and do not sponsor a retirement plan. Employers will start receiving their official registration information by US mail and email in the spring.

Registration Deadline: December 31 (of the year after reporting an average of five or more employees)

Employers with 1-4 employees

In 2022, California passed legislation (SB 1126) to expand the CalSavers mandate to employers with at least one employee. Employers are subject to the mandate if they employed an average of 1-4 employees and do not sponsor a retirement plan. Employers will receive official registration notifications by US mail and email.

Registration Deadline: December 31, 2025

*Employer eligibility is based on an employer's average number of employees throughout the previous year. This number is calculated by averaging the number of employees employers report to EDD on DE9/DE9C filings from the prior calendar year. Fractions are rounded to the nearest whole number.

For more information

 employer.calsavers.com

 clientservices@calsavers.com

 (855) 650-6916

 Mon - Fri 8:00 a.m. - 8:00 p.m. PT

Follow us

 @CalSavers

 CalSavers

A retirement savings program employees can trust

CalSavers is a simple, low-cost way for employees to save for retirement. Here's how:

- Employees save through payroll contributions
- Employee keeps their account even if they change jobs
- Easy, automated enrollment
- Roth Individual Retirement Account (IRA)



Flexible employee participation and investment choice

- Standard investment options and savings rate of 5%
- Flexibility to choose savings rate¹ and investments
- Choice to opt out or back in at any time.²



Cost to employee

CalSavers charges an administrative fee to pay for program operations and the underlying investments. This fee includes a Fixed Account Fee (\$4.50 assessed quarterly)³ and an Asset-Based Fee ranging from 0.325% to 0.49% of the account balance, depending on investment choice. Fees are automatically deducted from the CalSavers account balance over the course of the year. CalSavers also assesses a quarterly \$1.25 Paper Delivery Fee³ and a \$5 Paper Check Fee—both can be waived by signing up for e-delivery.



Investment menu

CalSavers participants can stick with standard investment options or choose from a simple menu from conservative investment options that seek to protect the principal to aggressive investments seeking higher returns. When employees invest in CalSavers, they get access to high quality mutual funds and other investment options, the value of which will vary with market conditions.

Selections include:

- Money Market Fund⁴
- Target Retirement Date Funds⁴
- Bond Fund
- Global Equity Fund
- Environmentally and Socially Conscious Fund

Employees can access the full list of investment options at saver.calsavers.com.

¹ Contributions may be made up to the the federal contribution limits set for a Roth IRA.

² By opting out, employee can leave any remaining balance in the account, transfer or roll it over to another Roth IRA, or request a distribution. Requesting a distribution may result in taxes and penalties.

³ The first Fixed Account Fee and the Paper Delivery Fee are not assessed until at least 90 days after the saver's initial contribution and will not be assessed for the quarter in which the first contribution is made.

⁴ Initial contributions will be invested in the Money Market Fund for a 30 day period. After this period, earnings in the Money Market Fund and future contributions will be invested in a Target Retirement Fund based on your age.

The CalSavers Retirement Savings Program ("CalSavers" or the "Program") is an automatic enrollment payroll deduction IRA overseen by the CalSavers Retirement Savings Board ("Board"). Ascensus College Savings Recordkeeping Services, LLC ("ACSR") is the program administrator. ACSR and its affiliates are responsible for day-to-day program operations. Participants saving through CalSavers beneficially own and have control over their IRAs, as provided in the Program Disclosure Booklet available at saver.calsavers.com. CalSavers is not sponsored by the employer, and therefore the employer is not responsible for the Program or liable as a Program sponsor. Employers are not permitted to endorse the Program or encourage or advise employees on whether to participate, how much (if any) to contribute or provide investment help.

CalSavers offers investment options selected by the Board. For more information on CalSavers' investment options go to saver.calsavers.com. Account balances in CalSavers will vary with market conditions. Investments in CalSavers are not guaranteed or insured by the Board, the State of California, the Federal Deposit Insurance Corporation, or any other organization.

CalSavers is a completely voluntary retirement program. Savers may opt out at any time or reduce or increase the amount of payroll contributions. If a saver opts out they can later opt back into CalSavers.

Saving through an IRA may not be appropriate for all individuals. Employer facilitation of CalSavers should not be considered an endorsement or recommendation by a participating employer, IRAs, or the investment options offered through CalSavers. IRAs are not exclusive to CalSavers and can be obtained outside of the Program and contributed to outside of payroll deduction. Contributing to a CalSavers IRA through payroll deduction may offer some tax benefits and consequences. However, not everyone is eligible to contribute to a Roth IRA and savers should consult a tax or financial advisor if they have questions related to taxes or investments. Employers do not provide financial advice and employees should not contact an employer for financial advice. Employers should refer all questions about the Program to CalSavers. Employers are not liable for decisions employees make pursuant to Section 100034 of the California Government Code.

Choosing the right retirement plan



The retirement business can be very rewarding — and very challenging. ADP® is committed to helping create retirement plans that can work better. ADP's deep Human Capital Management (HCM) knowledge means we:

- Have the breadth of services to make retirement plan administration easy to manage
- Help you control administration risk
- Put your interests first

Helping you and your employees plan for the future is a big responsibility. ADP can provide the support, tools, and access you need for you to help your employees find their way to retirement plan success.

Deciding Which Plan Is Right

The most popular types of small business retirement plans include SEP IRA, SIMPLE IRA, and 401(k) plans. When deciding which is right for your business, consider business size, self-employment income, and preferences regarding the plan's design and features, such as high contributions or simple administration. Below is a summary of each type of plan's features.

Simplified Employee Pension Individual Retirement Accounts (SEP IRA)

Employers can set up a SEP IRA for themselves and each of their employees. With a SEP, only employers can contribute money to the plan, and it must be an equal percentage for each employee. SEP IRAs are flexible — the employer contribution can change each year, which is a plus if your business has inconsistent cash flow. A SEP IRA allows you to save substantially, and it's easy to set up and administer. But, for businesses with many employees, the employer contributions of a SEP can add up.

SIMPLE IRA Plan

The Savings Incentive Match Plan for Employees — or SIMPLE IRA — is specifically designed for small businesses. While businesses with as many as 100 employees may use a SIMPLE IRA for their retirement plan solution, it is typically used by small businesses with less than 10 employees. It allows both employers and employees to put money in the plan (contributions). Employees can contribute a percentage of their salary to their accounts and choose how the money is invested, and the employer is required to make an annual matching or

non-elective contribution. SIMPLE plans are not subject to federal nondiscrimination testing requirements. These plans are typically low cost, and easy to set up and administer.

Small Business 401(k) Plan

401(k) plans can offer greater choices in plan design. For example, employers can establish eligibility requirements based on an employee's age and service. With a 401(k) plan, employees fund their own retirement accounts, and employer contributions are optional. These plans can offer greater contribution potential, and employees can take loans from their plan savings. Employers can elect to match a percentage of the amount employees contribute to the plan — often called deferral percentage — for the employees participating in the plan. They can also establish a vesting schedule for contributions made by the employer. Two common vesting schedules permitted under the Internal Revenue Code for employer contribution accounts are 100% vesting after three years of service, or a graded vesting schedule — 20% after two years of service, and 20% after each additional year of service until the employer contribution account is fully vested after six years of service.

401(k) plans require more plan administration, and may require annual nondiscrimination testing. Many 401(k) plans offer a variety of plan features and services to help simplify these responsibilities through certain plan design. For example, plans that adopt and follow the rules of a Safe Harbor plan automatically pass certain nondiscrimination requirements, because they generally require broad-based, fully vested employer contributions. An employer can choose to provide matching contributions or non-elective contributions to satisfy the Safe Harbor.

For more details visit www.irs.gov for resources and information about SEP IRAs, SIMPLE IRAs, and 401(k) plans.

Let's take a look at how the different plans compare.¹

	SEP IRA	SIMPLE IRA Plan	401(k) Plan
Business Size	Available to any size business	Available up to 100 employees	Any
Contribution Type(s)	Employer only	<ul style="list-style-type: none"> ▪ Employer ▪ Employee (contributions optional) 	<ul style="list-style-type: none"> ▪ Employer (optional) ▪ Employee elective
Compensation Limit ²	\$345,000	\$345,000 applicable to 2% non-elective contribution	\$345,000
Eligibility	Every employee who is 21 or older, is employed by the employer for three of the last five years, and has compensation of at least \$750	Each employee who received compensation of at least \$5,000 in any two preceding years — even if they are not consecutive — and who is expected to receive compensation of at least \$5,000 in the year for which eligibility is being determined. May exclude non-resident aliens and collectively bargained employees.	Employers may choose eligibility requirements and may exclude classes of employees, but may not exclude employees in an included class who have attained age 21 and are employed by the employer for at least one year.
Annual Employer Contribution Limit	The lesser of 25% of total compensation, up to a maximum compensation limit, or \$69,000	Either match employee contributions dollar for dollar up to 3% of compensation (can be reduced to as low as 1% in any 2 out of 5 years) OR contribute 2% of each eligible employee's compensation (up to \$345,000)	Employee contributions plus employer-matching and/or profit-sharing contributions cannot exceed lesser of 100% of compensation limit or \$69,000
Annual Employee Deferral Limit	Not applicable	\$16,000	\$23,000
Age 50+ Catch Up Contributions ³	Not applicable	\$3,500	\$7,500
Loans and Withdrawals	<ul style="list-style-type: none"> ▪ Loans: Not permitted ▪ Withdrawals: Permitted⁴ 	<ul style="list-style-type: none"> ▪ Loans: Not permitted ▪ Withdrawals: Permitted⁵ 	<ul style="list-style-type: none"> ▪ Loans: Permitted ▪ Withdrawals: Not permitted⁶
Required Plan Testing	No	No	Yes

Helping you and your employees save for the future.

A retirement plan is a smart benefit for your employees, and your business. If you would like more information about ADP's retirement plan offerings, please contact a licensed ADP Retirement Services District Manager. This information is provided courtesy of:

¹ All limits in this chart are for 2024.

² This is the maximum amount of compensation on which benefits may be calculated.

³ Eligible employees who have reached age 50 or older in a year may make additional contributions to the plan.

⁴ May be subject to 10% penalty if under age 59½.

⁵ May be subject to 25% penalty during the first two years of the SIMPLE IRA account and 10% penalty thereafter if under age 59½.

⁶ Except that the plan may permit the participant to withdraw certain money types under certain circumstances, such as attaining age 59 1/2 and incurring certain financial hardships.

For more information on retirement solutions provided by ADP please visit www.adp.com/401k. Information regarding retirement plans is general and not intended as advice. Retirement plans are complex, and the federal and state laws or regulations on which they are based vary for each type of plan and are subject to change. In addition, some products, investment vehicles, and services may not be available or appropriate in all workplace savings plans. Investment options are available through the applicable entity(ies) for each retirement product. Investment options in the "ADP Direct Products" are available through either ADP Broker-Dealer, Inc. (ADPBD), Member FINRA, an affiliate of ADP, Inc., One ADP Blvd, Roseland, NJ or (in the case of certain investments) ADP, Inc. Only licensed representatives of ADP BD or, in the case of certain products, of a broker-dealer firm that has executed a marketing agreement with ADP, Inc. may offer and sell ADP retirement products and services or speak to retirement plan features and/or investment options available in any ADP retirement product.

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DRAFT PROPOSED MARIN COUNTY LAW LIBRARY ANNUAL BUDGET

2024-2025 PROJECTED FISCAL YEAR

(From 7/1/2024 to 6/30/2025)

MUNIS Fund No. : 3400

Program: 7960

Subprogram: 7961

SUMMARY	2023-2024	2024-2025
Projected Receipts:	\$ 232,568	\$ 176,050
Actual Receipts:	<u>\$ 201,605</u>	
Balance Receipts:	- \$ 30,963	
Projected Expenses:	\$ 232,568	\$ 232,702
Actual Expenses:	<u>\$ 229,311</u>	
Balance Expenses:	\$ 3,257	
Actual Budget Balance*:	+ \$ (27,706)	
Difference:		+ \$ (56,652)

INCOME				
County Code	Description	2023 - 2024 Projected	2023-2024 Actual*	2024-2025 Projected
451970	Filings	\$ 145,000	\$ 169,085	\$ 155,000
441115	Interest	\$ 450	\$ 5,045	\$ 3,000
462650	Photocopies	\$ 1,100	\$ 1,587	\$ 1,100
470410	Book Sales	\$ 700	\$ 1,874	\$ 700
470330	Donations	\$ 3,000	\$ 575	\$ 3,000
470110	Fax/Paper Sales	\$ 30	\$ 52	\$ 50
441215	Conference Room	\$ 100	\$ 495	\$ 200
462610	Proctoring	\$ -	\$ -	\$ -
461810	Misc. Receipts (CLE, etc.)	\$ 62,188	** \$ 11,284	*** \$ 56,652
462610	Passport Services	\$ 20,000	\$ 11,720	\$ 13,000
480210	Transfers In	\$ -	\$ -	\$ -
Total Revenue:		\$ 232,568	\$ 201,717	\$ 232,702

(Deficit, if any, to be paid from Unrestricted Fund Balance.

Current amount in 461810 for projected 2024-2025 is amount required to fill deficit.

DRAFT PROPOSED MARIN COUNTY LAW LIBRARY ANNUAL BUDGET

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2023-2024 PROJECTED FISCAL YEAR

(From 7/1/2023 to 6/30/2024)

EXPENSES

County Code	Debits/ Expenditures	2023 - 2024 Projected	2023 - 2024 Actual*	2024-2025 Projected
	<u>Staff</u>			
511110	Librarian	\$ 63,000	\$ 59,246	\$ 66,150
511220	Extra Hire	\$ 49,000	\$ 36,352	\$ 51,450
511345	Holiday Pay	\$ -	\$ -	\$ -
515110	Social Security	\$ 6,944	\$ 5,997	\$ 7,300
515115	Medicare	\$ 1,624	\$ 1,403	\$ 1,710
513215	Health Benefits	\$ 7,000	\$ 4,709	\$ 6,600
514110	Workers Compensation	\$ 1,700	\$ 539	\$ 900
515120	Unemployment Insur.	\$ 1,500	\$ 630	\$ 1,200
		\$ 130,768	\$ 108,876	\$ 135,310
	<u>Administrative Expenses</u>			
521610	Insurance	\$ 6,000	\$ 4,709	\$ 5,400
522210	Memberships/Prof Develop.	\$ 7,500	\$ 3,551	\$ 5,000
522440	Petty Cash/Postage	\$ 3,800	\$ 1,508	\$ 3,200
522410	Office Expenses	\$ 3,000	\$ 2,884	\$ 3,200
522310	Projects (FUTA Taxes/ADP Payroll	\$ 2,500	\$ 2,580	\$ 3,000
522930	Copy Machines	\$ -	\$ 3,402	\$ 4,992
521310	Phone/Internet	\$ 13,000	\$ 27,703	\$ 20,000
		\$ 35,800	\$ 46,337	\$ 44,792
	<u>Collection</u>			
522815	Publications Upkeep	\$ 66,000	\$ 74,098	\$ 52,600
522410	Book Binding	-	-	\$ -
		\$ 66,000	\$ 74,098	\$ 52,600
Total Expenses:		\$ 232,568	\$ 229,311	\$ 232,702

(Deficit, if any, to be paid from Unrestricted Fund Balance)

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MARIN COUNTY LAW LIBRARY EMPLOYEE HANDBOOK

INTRODUCTION

This handbook is intended to provide employees with a general understanding of the Marin County Law Library policies. It is intended to familiarize employees with the Marin County Law Library as well as information regarding an employee's responsibilities. All employees are required to read, understand, and follow the provisions of the handbook. If you have questions about any of the policies, please feel free to contact the Marin County Law Library Director. This handbook cannot anticipate every situation or answer every question about employment. It is not an employment contract or a legal document. The Marin County Law Library reserves the right to change or revise its policies and benefits described in this handbook without notice whenever the Marin County Law Library determines that such action is warranted. This handbook replaces all earlier versions of the employee handbook. Except for the policy of at-will employment and policies compelled by law, the Marin County Law Library may change the policies described in this handbook at any time. The Marin County Law Library's policy of employment at will can only be modified in a writing signed by the Marin County Law Library Board of Trustees.

EQUAL OPPORTUNITY EMPLOYMENT

Marin County Law Library is an Equal Opportunity Employer. The Marin County Law Library does not discriminate against qualified employees, volunteers, unpaid interns, or applicants, because of race, color, religion, sex, sexual preference, sexual identity, pregnancy, national origin, ancestry, citizenship, age (over 40), marital status, physical disability, mental disability, medical condition, military and veteran status, marital status, religion, or any other characteristic protected by federal or state law or local ordinance. When necessary, the Marin County Law Library will reasonably accommodate employees and applicants with disabilities if the person is otherwise qualified to safely perform all of the essential functions of the position to the extent required by law.

AT-WILL EMPLOYMENT

Your employment with the Marin County Law Library is at will. This means that you are free to terminate your employment at any time, with or without cause. The Marin County Law Library has a right to terminate your employment at any time as well, with or without cause. No one in the Marin County Law Library other than the Marin County Board of Trustees has the authority to alter your at-will status or to enter into any agreement for employment for a specified period of time or to make any agreement contrary to this policy. Only the Marin County Law Library Board of Trustees may do so, and only in a written agreement signed by both the President of the Board of Trustees with approval from the Marin County Law Library Board of Trustees and you.

INTRODUCTORY PERIOD

All new employees serve on an introductory basis for the first ninety (90) days of employment. During this period, employees will have the opportunity to learn about the position. The Marin County Law Library will also use this period to determine whether the employee is

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able to meet its expectations. Introductory periods may be extended for legitimate business reasons or because of approved absences taken by the employee during the introductory period. During the introductory period and during the entire course of your employment, you will be an at-will employee.

OVERTIME

Nonexempt employees may be required to work overtime. Nonexempt employees are paid overtime for all hours worked over eight (8) hours in one (1) day or over forty (40) hours in a workweek. In order to work overtime, you must obtain prior advance approval from the Marin County Law Library Director. Working overtime without permission may result in discipline, up to and including termination of employment.

REST AND MEAL BREAKS

Rest Breaks

Nonexempt employees are entitled to a paid fifteen (15) minute rest break for shifts from three and half to six (3-1/2 to 6) hours in length, a twenty (20) minute rest break for shifts of more than six (6) hours and up to ten (10) hours, and a thirty (30) minute rest break for shifts of more than ten (10) hours and up to fourteen (14) hours. Employees should take their rest breaks in the middle of the work period to the extent that it is practicable.

Meal Breaks

Nonexempt employees who work five (5) hours or more are entitled to an uninterrupted unpaid thirty (30) minute meal break every five (5) hours. The meal break must be taken no later than the end of the fifth (5th) hour. An employee is entitled to a second meal period only if he or she works more than ten (10) hours per day. The second meal period must be taken no later than the employee's tenth (10th) hour of work.

PAYROLL DEDUCTIONS

In accordance with federal and state laws, the following may be withheld from your wages:

1. Federal income tax;
2. California income tax;
3. Federal Insurance Contributions Act (FICA) payroll tax (for Social Security and Medicare); and
4. Disability insurance contributions (SDI).

If you want to change the number of your exemptions or your marital status for tax withholding purposes, complete the appropriate form available from the Marin County Law Library Director.

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MEDICAL BENEFITS

All full-time employees are eligible to participate in the Marin County Law Library's group medical plan. During your orientation period, Human Resources will provide you with all necessary documents if you elect to participate in the group medical plan. The Marin County Law Library reserves the right to change, amend, or discontinue the benefits it offers to its employees at any time.

VACATION LEAVE

All full-time employees are eligible for up to four (4) weeks of paid vacation. Vacation hours accrue at thirteen and a third (13.33) hours per month, and vacation may only be utilized after vacation hours have accrued. Employees may not accrue more than two hundred forty (240) hours of vacation time. After two hundred forty (240) hours, no more vacation hours will be accrued until an employee's unused accrued vacation time is below two hundred forty (240) hours.

SICK LEAVE

As of July 1, 2015, California law provides for mandatory sick leave under [AB 1522](#), the Healthy Workplaces, Healthy Families Act.

Eligible employees can earn sick leave at the rate of 1 hour of paid sick time for every thirty (30) hours worked. You will need to meet the ninety (90) day employment requirement before taking any paid sick leave. If you are an exempt employee, you are presumed to work forty (40) hours per workweek for purposes of sick time accrual. However, if your normal workweek is less than forty (40) hours, your accrual will be based on your normal workweek. The Marin County Law Library does not pay employees for unused paid sick leave. If you are rehired within 1 year of separation from employment, you may be eligible for reinstatement of previously accrued paid sick time.

You may earn a maximum of six (6) days or forty-eight (48) hours of paid sick time. After you have reached this maximum amount, no further additional paid sick time will be earned until some, or all of the accrued paid sick time is used.

The maximum amount of paid sick time you can use in each year of employment is three (3) days or twenty-four (24) hours, regardless of how much paid sick time you have earned.

Qualifying Reasons for Paid Sick Leave

You may use paid sick time for any of the following reasons:

- **Diagnosis, care, or treatment of an existing health condition for yourself or a covered family member;**
- **Preventive care for yourself or a covered family member;**

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- **For certain, specified purposes when you are a victim of domestic violence, sexual assault, or stalking.**

For purposes of this policy, a covered family member includes the following:

- **A child, defined as a biological, foster, or adopted child; a stepchild; or a legal ward, regardless of the age or dependency status of the child. A child may also be someone for whom you have accepted the duties and responsibilities of raising, even if he or she is not your legal child.**
- **A parent, defined as a biological, foster, or adoptive parent; a stepparent; or a legal guardian of yourself, your spouse, or your registered domestic partner. A parent may also be someone who accepted the duties and responsibilities of raising you when you were a minor child, even if he or she is not your legal parent.**
- **A spouse.**
- **A registered domestic partner.**
- **A grandparent.**
- **A grandchild.**
- **A sibling.**
- **A designated person (*i.e.*, a person identified by you at the time you request paid sick time). Note that you are limited to one designated person per twelve (12) month period.**

Use of Paid Sick Leave

If the need for paid sick leave is foreseeable, you are to provide advance notice to the Marin County Law Library Director.

If the need is not foreseeable, you are to provide notice to the Marin County Law Library Director as soon as practicable.

Your use of paid sick time may run concurrently with other leaves under federal, state, or local law.

FAMILY CARE AND MEDICAL LEAVE

The Marin County Law Library will provide family and medical care leave for eligible employees, as required by state and federal law, including leaves under the federal [Family and Medical Leave Act of 1993 \(FMLA\)](#), the [California Family Rights Act \(CFRA\)](#), and the [Paid Family Care Leave Act \(PFCLA\)](#). An individual who is entitled to leave under the [FMLA](#) and

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the [CFRA](#) must take Family Temporary Disability Insurance (FTDI) leave concurrently with leave taken under the [FMLA](#) and the [CFRA](#).

DEFINITIONS

In implementing this policy, the following definitions will apply.

“12-Month Period” means a rolling twelve (12) month period measured backward from the date leave is taken and continuous with each additional leave day taken.

“Child” means a child under eighteen (18) years of age, or eighteen (18) years of age or older who is incapable of self-care because of a mental or physical disability. An employee’s child is one for whom the employee has actual day-to-day responsibility for care and includes a biological, adopted, or foster child, a stepchild, a legal ward, a son or daughter of a domestic partner, or a son or daughter to whom the employee stands in loco parentis (in place of a parent).

“Parent” means the biological parent, foster parent, adoptive parent, stepparent, or parent-in-law of an employee or an individual who stands or stood in loco parentis (in place of a parent) to an employee when the employee was a child.

“Spouse” means a husband or wife as defined or recognized under California state law for purposes of marriage.

“Domestic Partner” means a partner as defined in [Section 297 of the Family Code](#). “Designated Person” means any individual related by blood or whose association with the employee is the equivalent of a family relationship. (Note that the Marin County Law Library limits an employee to one designated person per 12-month period.)

“Family Member” means a Child, Parent, Parent-in-Law, Grandparent, Grandchild, Sibling, Spouse, Domestic Partner, or Designated Person.

“Serious Health Condition” means an illness, injury impairment, or physical or mental condition that involves:

(1) Inpatient care (*i.e.*, an overnight stay) in a hospital, hospice, or residential medical care facility, including any period of incapacity (*i.e.*, inability to work or perform other regular daily activities because of the serious health condition, treatment involved, or recovery therefrom); or

(2) Continuing treatment by a health care provider (*i.e.*, a serious health condition involving continuing treatment by a Health Care Provider as defined under federal or state law).

“Health Care Provider” has the same meaning as defined under the [FMLA](#) and [CFRA](#).

REASONS FOR LEAVE

Leave is only permitted for the following reasons:

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- (1) The birth of a child or to care for a newborn of an employee or the employee's domestic partner within one (1) year of birth;
- (2) The placement of a child with an employee in connection with the adoption or foster care of the child by the employee or the employee's domestic partner within one (1) year of placement;
- (3) To care for a Family Member who has a serious health condition; or
- (4) Because of the employee's serious health condition that makes the employee unable to perform the essential functions of his or her position.

EMPLOYEES ELIGIBLE FOR LEAVE

An employee is eligible for leave if the employee:

- (1) Has been employed for at least twelve (12) months; and
- (2) Has been employed for at least one thousand two hundred fifty (1250) hours during the twelve (12) month period immediately preceding the commencement of the leave.

The Marin County Law Library counts FMLA-CFRA leave using a "looking back" method, meaning that if an employee requests FMLA-CFRA leave, the Marin County Law Library looks back over the preceding twelve (12) months to determine if the employee has taken FMLA-CFRA leave during that time period. If the employee did take FMLA-CFRA leave, then that time would be deducted from the amount of leave for which the employee is now eligible. If the employee has not taken any FMLA-CFRA leave, then the employee would be eligible for all twelve (12) weeks of FMLA-CFRA leave.

AMOUNT OF LEAVE

Eligible employees are entitled to a total of twelve (12) workweeks of leave during any twelve (12) month period.

MINIMUM DURATION OF LEAVE

If leave is requested for the birth, adoption, or foster care placement of a child of the employee or domestic partner, leave must be concluded within one (1) year of the birth or placement of the child. In addition, the basic minimum duration of such leave is two (2) weeks. However, an employee is entitled to leave for one of these purposes (*e.g.*, bonding with a newborn) for at least one (1) day, but less than two (2) weeks' duration on any two (2) occasions.

If leave is requested to care for a Family Member or for the employee himself or herself with a serious health condition, there is no minimum amount of leave that must be taken. However, the notice and medical certification provisions of this policy must be complied with.

SPOUSES BOTH EMPLOYED BY MARIN COUNTY LAW LIBRARY

In any case in which domestic partners or a husband and wife are both employed by the Marin County Law Library and both are entitled to leave, the aggregate number of workweeks of leave to which both may be entitled may be limited to twelve (12) workweeks during any twelve

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(12) month period if leave is taken for the birth or placement for adoption or foster care of the employees' child (*i.e.*, bonding leave). This limitation does not apply to any other type of leave under this policy.

EMPLOYEE BENEFITS WHILE ON LEAVE

Leave under this policy is unpaid. However, an employee may be able to use accrued paid leave. While on leave, the employee will continue to be covered by the Marin County Law Library's group health insurance to the same extent that coverage is provided while the employee is on the job.

The employee may be entitled to other, non-Marin County Law Library-provided benefits under any other federal or state programs such as state disability insurance benefits. The Marin County Law Library is not responsible for administering any such benefits.

Employees may make the appropriate contributions for continued coverage under the preceding non-health benefit plans by payroll deductions or direct payments made to these plans. Depending on the particular plan, the Marin County Law Library will inform the employee whether the premiums should be paid to the carrier or to the Marin County Law Library. The coverage on a particular plan may be dropped if the employee is more than thirty (30) days late in making a premium payment. However, the employee will receive a notice at least fifteen (15) days before coverage is to cease, advising him or her that he or she will be dropped if the premium payment is not paid by a certain date. Employee contribution rates are subject to any change in rates that occurs while the employee is on leave.

If the employee fails to return to work after his or her leave entitlement has been exhausted or expires, the Marin County Law Library shall have the right to recover its share of health plan premiums for the entire leave period, unless the employee does not return because of the continuation, recurrence, or onset of a serious health condition of the employee or his or her family member that would entitle the employee to leave or because of circumstances beyond the employee's control. The Marin County Law Library shall have the right to recover premiums (or other sums due the Marin County Law Library) from an employee against his or her wages, paid time off, vacation, or holiday pay.

SUBSTITUTION OF PAID ACCRUED LEAVES

While on leave under this policy, an employee may elect to concurrently use paid accrued leaves. Similarly, the Marin County Law Library may require an employee to concurrently use paid accrued leaves after requesting FMLA-CFRA leave and Paid Family Care Leave and may also require an employee to use family and medical care leave concurrently with a non-FMLA-CFRA leave that is FMLA-CFRA-qualifying.

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EMPLOYER'S RIGHT TO REQUIRE EMPLOYEE TO USE PAID ACCRUED LEAVES CONCURRENTLY WITH FAMILY LEAVE

When an employee has earned or accrued paid vacation or administrative leave, that paid leave must be substituted for all or part of any (otherwise) unpaid leave under this policy.

An employee is entitled to and may use sick leave concurrently with leave under this policy if:

- (1) The leave is for the employee's own serious health condition; or
- (2) The leave is needed to care for a Family Member with a serious health condition and would be permitted as sick leave under the Marin County Law Library's sick leave policy.

An employee may use vacation or sick time concurrently with leave under this policy.

As a condition of an employee's initial receipt of family temporary disability insurance benefits during any twelve (12) month period in which an employee is eligible for these benefits, the Marin County Law Library may require an employee to take up to two (2) weeks of earned but unused vacation or sick leave (or both) before the employee's initial receipt of these benefits. If the Marin County Law Library requires the employee to take vacation or sick leave, that portion of the leave that does not exceed one (1) week shall be applied to any applicable waiting period for receipt of family temporary disability insurance benefits.

MEDICAL CERTIFICATION

Employees who request leave for their own serious health condition or to care for a Family Member who has a serious health condition must provide written certification from the health care provider of the individual requiring care if requested by the Marin County Law Library.

Time to Provide Medical Certification

When an employee's leave is foreseeable and at least thirty (30) days' notice has been provided, if a medical certification is requested, the employee must provide it before the leave begins. When this is not possible, the employee must provide the requested certification to the Marin County Law Library within the time frame requested by the Marin County Law Library (which must allow at least fifteen (15) calendar days after the employer's request), unless it is not practicable under the particular circumstances to do so despite the employee's diligent good faith efforts.

Consequences of Failure to Provide Adequate or Timely Certification

The Marin County Law Library will advise the employee in writing what additional information is necessary to make the certification complete and sufficient. The employee will have seven (7) calendar days, unless not practicable under the circumstances despite the

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employee's diligent good faith efforts, to cure any deficiency. If the deficiency is not cured, the Marin County Law Library may deny the taking of FMLA-CFRA leave.

Recertification

If the Marin County Law Library doubts the validity of a certification, the Marin County Law Library may require a medical opinion of a second health care provider chosen and paid for by the Marin County Law Library. If the second opinion is different from the first, the Marin County Law Library may require the opinion of a third provider jointly approved by the Marin County Law Library and the employee but paid for by the Marin County Law Library. The opinion of the third provider will be binding. An employee may request a copy of the health care provider's opinions when there is a recertification.

INTERMITTENT LEAVE OR REDUCED SCHEDULE LEAVE

If an employee requests leave intermittently (*e.g.*, a few days or hours at a time) or on a reduced leave schedule to care for a Family Member with a serious health condition, the employee must provide medical certification that such leave is medically necessary. "Medically necessary" means there must be a medical need for the leave and that the leave can best be accomplished through an intermittent or reduced leave schedule.

EMPLOYEE NOTICE OF LEAVE

Although the Marin County Law Library recognizes that emergencies arise that may require employees to request immediate leave, employees are required to give as much notice as possible of their need for leave. If leave is foreseeable, at least thirty (30) days' notice is required. In addition, if an employee knows that he or she will need leave in the future but does not know the exact date(s) (*e.g.*, for the birth of a child or to take care of a newborn), the employee shall inform his or her supervisor as soon as possible that such leave will be needed. Absent unusual circumstances, such notice may be given in accordance with the Marin County Law Library's usual and customary call-in procedures for reporting an absence. The employee must provide notice sufficient to make the Marin County Law Library aware that the employee needs FMLA-CFRA-qualifying leave and of the anticipated timing and duration of the leave. If the Marin County Law Library determines that an employee's notice is inadequate, the Marin County Law Library may delay the granting of FMLA-CFRA leave.

REINSTATEMENT ON RETURN FROM LEAVE

Right to Reinstatement

On expiration of leave, an employee is entitled to be reinstated to the position of employment held when the leave commenced, or to an equivalent position with equivalent employment benefits, pay, and other terms and conditions of employment. Employees have no greater rights to reinstatement, benefits, and other conditions of employment than if the employee had been continuously employed during the FMLA-CFRA-Paid Family Care Leave period.

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If a definite date of reinstatement has been agreed on at the beginning of the leave, the employee will be reinstated on the date agreed on. If the reinstatement date differs from the original agreement date between the employee and the Marin County Law Library, the employee will be reinstated within two (2) business days, when feasible, after the employee notifies the Marin County Law Library of his or her readiness to return.

Employee's Obligation to Periodically Report on His or Her Condition

An employee may be required to periodically report on his or her status and intent to return to work. This will avoid any delays to reinstatement when the employee is ready to return.

Fitness-for-Duty Certification

As a condition of reinstatement of an employee whose leave was based on the employee's own serious health condition that made the employee unable to perform his or her job, the employee must obtain and present a fitness-for-duty certification from the health care provider stating that the employee is able to perform the essential functions of the employee's job. When reasonable job safety concerns exist, the Marin County Law Library may require a fitness-for-duty certification before an employee may return to work when the employee takes intermittent or reduced leave. Failure to provide such certification will result in denial of reinstatement.

MILITARY CAREGIVER LEAVE

Under the FMLA, an eligible employee who is a spouse, child, parent, or next of kin of a covered servicemember with a serious injury or illness may take up to a total of twenty-six (26) workweeks of unpaid leave during a single twelve (12) month period to care for the servicemember. A covered servicemember is a current member of the Armed Forces, including a member of the National Guard or Reserves, who is undergoing medical treatment, recuperation, or therapy, is otherwise on outpatient status, or is otherwise on the temporary disability retired list, in each case for a serious injury or illness. A serious injury or illness is one that was incurred by a servicemember in the line of duty on active duty that may render the servicemember medically unfit to perform the duties of his or her office, grade, rank, or rating. The single twelve (12) month period for leave to care for a covered servicemember with a serious injury or illness begins on the first day the employee takes leave for this reason and ends 12 months later, regardless of a twelve (12) month period established by the employer for other types of FMLA leave. An eligible employee is limited to a combined total of 26 workweeks of leave for any FMLA-qualifying reason during the single twelve (12) month period. Only twelve (12) of the twenty-six (26) weeks total may be for an FMLA-qualifying reason other than to care for a covered servicemember.

QUALIFYING EXIGENCY LEAVE

Under the FMLA and CFRA, an eligible employee may take up to a total of twelve (12) workweeks of unpaid leave during the normal twelve (12) month period established by the employer for FMLA-CFRA leave for qualifying exigencies arising out of the fact that the

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employee's spouse, domestic partner, child, or parent is on active duty, or has been notified of an impending call or order to active duty, in support of a contingency operation.

Qualifying exigencies include:

(1) Issues arising from a covered military member's short-term deployment (*i.e.*, deployment on seven (7) or fewer days of notice) for a period of 7 days from the date of notification;

(2) Military events and related activities such as official ceremonies, programs, or events sponsored by the military or family support or assistance programs and informational briefings sponsored or promoted by the military, military service organizations, or the American Red Cross that are related to the active duty or call to active-duty status of a covered military member;

(3) Certain child care and related activities arising from the active duty or call to active duty status of a covered military member, such as arranging for alternative child care, providing child care on a non-routine, urgent, immediate-need basis, enrolling or transferring a child in or to a new school or day care facility, or attending certain meetings at a school or day care facility, in each case if necessary because of circumstances arising from the active duty or call to active duty of a covered military member;

(4) Certain activities arising from the military member's covered active duty related to the care of the military member's parent who is incapable of self-care, such as arranging for alternative care, providing for care on a non-routine, urgent, immediate-need basis, admitting or transferring a parent to a new care facility, and attending certain meetings with staff at a care facility, such as hospice or social service providers;

(5) Making or updating financial and legal arrangements to address a covered military member's absence;

(6) Attending counseling provided by someone other than a health care provider for oneself, the covered military member, or a child of the covered military member, the need for which arises from the active duty or call to active-duty status of a covered military member;

(7) Taking up to five (5) days of leave to spend time with a covered military member who is on short-term temporary rest and recuperation leave during deployment.

(8) Attending to certain post-deployment activities, including attending arrival ceremonies, reintegration briefings and events, and other official ceremonies or programs sponsored by the military, for a period of ninety (90) days following the termination of the covered military member's active duty status;

(9) Addressing issues arising from the death of a covered military member; and

(10) Any other event that the employee and employer agree is a qualifying exigency.

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LEAVE TO CARE FOR COVERED SERVICEMEMBER WITH SERIOUS ILLNESS OR INJURY INCURRED IN THE LINE OF DUTY ON ACTIVE DUTY

Under the FMLA, eligible employees who have family members who are covered servicemembers may take up to twenty-six (26) workweeks of leave in a single twelve (12) month period to care for a covered servicemember with a serious illness or injury incurred in the line of duty on active duty. The leave may be taken intermittently whenever medically necessary to care for a covered servicemember with a serious injury or illness. Leave may also be taken intermittently for a qualifying exigency arising out of the active-duty status or call to active duty of a covered military member. When leave is needed for planned medical treatment, the employee must make a reasonable effort to schedule the treatments so as not to unduly disrupt the Marin County Law Library's operation.

Spouses employed by the same employer are limited to a combined total of twenty-six (26) workweeks of leave in a single twelve (12) month period if the leave is to care for a covered servicemember with a serious injury or illness; for the birth and care of a newborn child; for placement of a child for adoption or foster care; or for care of a parent who has a serious health condition.

EMPLOYEE NOTICE

Employees seeking to use Military Caregiver Leave must provide thirty (30) days' advance notice of a need to take FMLA leave for planned medical treatment for a serious injury or illness of a covered servicemember. If leave is foreseeable but thirty (30) days' advance notice is not practicable, the employee must provide notice as soon as practicable—generally, either the same or next business day. The employee must provide notice of the need for foreseeable leave based on a qualifying exigency as soon as practicable. When the need for military family leave is not foreseeable, the employee must provide notice to the employer as soon as practicable under the facts and circumstances of the particular case. Generally, it should be practicable to provide notice for unforeseeable leave within the time prescribed by the Marin County Law Library's usual and customary notice requirements.

The employee must provide sufficient information to make the Marin County Law Library aware of the need for FMLA leave for these reasons and the anticipated timing and duration of the leave. Such information may include, as applicable, information to the effect that:

(1) The requested leave is for a particular qualifying exigency related to the active-duty status or call to active duty of a covered military member, along with the anticipated duration of the leave; and

(2) The leave is for a qualifying family member who is a covered servicemember with a serious injury or illness, along with the anticipated duration of the leave.

EMPLOYER NOTICE

When the employee requests FMLA leave under this policy, the Marin County Law Library will notify the employee of his or her eligibility to take leave, including a reason for non-

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eligibility if the employee is determined not to be eligible. Such eligibility notice may be oral or written and should generally be given within five (5) business days of the employee's request for leave. Subsequent eligibility notice in the same twelve (12) month leave period may be required when an employee's eligibility status changes. The Marin County Law Library will inform employees of their rights and responsibilities under this leave, including giving specific written information on what is required of the employee.

When the Marin County Law Library has enough information to determine that the leave is being taken for an FMLA-qualifying reason, the Marin County Law Library will notify the employee that the leave is designated and will be counted as FMLA leave. The Marin County Law Library will designate leave that qualifies as both leave to care for a covered servicemember with a serious injury or illness and leave to care for a qualifying family member with a serious health condition as leave to care for a covered servicemember in the first instance. This designation notice will be in writing and generally will be given within five (5) business days of the determination. The Marin County Law Library will notify the employee of the number of hours, days, or weeks that will be counted against the employee's FMLA entitlement.

CERTIFICATION REQUIREMENTS

The Marin County Law Library will require the employee who requests military family leave to produce a certification and may require the employee certification to be supported by:

(1) For leave for a qualifying exigency, a copy of the covered military member's active-duty orders and certification providing the appropriate facts related to the particular qualifying exigency for which leave is sought, including contact information if the leave involves meeting with a third party; and

(2) For leave to care for a covered servicemember with a serious injury or illness, certification completed by an authorized health care provider or a copy of an Invitational Travel Order (ITO) or Invitational Travel Authorization (ITA) issued to any member of a covered servicemember's family.

PREGNANCY DISABILITY LEAVE (PDL)

An employee may take pregnancy disability leave (PDL) if she is disabled because of pregnancy, childbirth, or a related medical condition, including prenatal care and severe morning sickness. The length of leave will be up to seventeen and a third (17-1/3) weeks or the equivalent number of days the employee would normally work within the seventeen and a third (17-1/3) week period. Intermittent leave or a reduced work schedule may be taken.

To better accommodate this type of leave, the Marin County Law Library reserves the right to temporarily transfer the employee to an available alternative position with equivalent pay and benefits. The Marin County Law Library will also consider a temporary transfer if medically advisable. The Marin County Law Library is not required to create a position; to discharge another employee or transfer another employee with more seniority; or to promote or transfer an employee if she is not qualified for the position. PDL will run concurrently with other applicable leaves, such as FMLA leave. The twelve (12) month look-back period will apply to all leaves

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granted concurrently. PDL may be unpaid, provided that an employee may exhaust accrued benefits such as accrued sick or vacation leave.

PAY AND BENEFITS DURING LEAVE OF ABSENCE

Employees will be expected to exhaust their vacation or sick leave (if applicable) before going into an unpaid status. This requirement will be applied consistent with state and federal law.

Employees will continue to receive the same level of benefit coverage they were eligible to receive before their leave, in accordance with applicable state and federal law. If the Marin County Law Library approves a request made by an employee for a continuation of a leave that extends beyond the leave period provided by applicable federal or state law, the employee will be eligible to continue his or her benefits through the Consolidated Omnibus Budget Reconciliation Act of 1985 (COBRA).

WORKERS' COMPENSATION

Notify the Marin County Law Library Director immediately if you are involved in an on-the-job injury. The supervisor will assist you in seeking medical care and filling out a workers' compensation claim. The Marin County Law Library is legally obligated to report work-related injuries to its workers' compensation carrier within certain time frames, even if medical care is not needed. It is mandatory for all employees to report work-related injuries.

If you are injured, the Marin County Law Library may send you to a physician for medical treatment unless you notify the Marin County Law Library in writing that you wish to see your own physician.

MEDICAL EXAMINATIONS

Employees may be required to take medical examinations as a condition of employment or for continued employment in certain circumstances. A medical exam may be required after a conditional offer of employment has been made to an applicant in certain job positions. In addition, the Marin County Law Library may require a medical examination to determine whether or not the employee is able to perform the essential functions of a job or in certain situations to assess the employee's fitness for duty in accordance with federal and state laws.

PERSONNEL RECORDS

The Marin County Law Library keeps a personnel file on each employee. The contents of your file are confidential to the extent permitted by law. You or your representative may inspect your personnel file and obtain a copy of all documents in your file. Please inform Human Resources of any changes in your personal information such as your address, phone number, marital status, or number of dependents in order to keep your file up to date.

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CONFIDENTIAL INFORMATION

As part of your employment, you may have access to trade secrets or confidential information that belongs to the Marin County Law Library. Such information may include financial information, customer lists, preferences, sales data, business plans, vendor information, and other proprietary information. All employees with access to confidential or trade secret information must keep all such information confidential. The requirement to keep all such information confidential continues even after the employee is no longer working for the Marin County Law Library. Violation of this policy may subject the employee to discipline, up to and including termination.

OUTSIDE EMPLOYMENT

Employees may engage in outside employment to the degree that it does not conflict with the interests of the Marin County Law Library. No employee is permitted to accept employment, whether for pay or otherwise, if the additional outside employment leads to a conflict or potential conflict of interest for the employee, if the nature of the outside employment will reflect negatively on the Marin County Law Library, or if the outside employment conflicts with the duties of the employee.

DRUGS AND ALCOHOL

The Marin County Law Library is a drug-free, alcohol-free environment. Employees may not report to work under the influence of drugs or alcohol, including recreational cannabis. The Marin County Law Library reserves the right to search, without the employee's consent, all areas and property in which the Marin County Law Library maintains control or joint control with the employee for drugs and alcohol. Refusal to allow for search when requested may be grounds for discipline, up to and including termination.

Employees reasonably believed to be under the influence of alcohol or drugs may be required to submit to drug and alcohol testing.

The legal use of controlled substances, such as prescription drugs prescribed by a licensed physician or over-the-counter medications, is not prohibited by this policy.

INSPECTION OF WORKSTATIONS AND PERSONAL BELONGINGS

The Marin County Law Library reserves the right to search any and all Marin County Law Library vehicles, workstations, work areas, desks, file cabinets, lockers, and other personal property of employees and their contents for illegal drugs, alcohol, weapons, and stolen property (collectively referred to as "Contraband"). The Marin County Law Library will conduct searches when there is reasonable cause to believe that you have Contraband in your possession. The Marin County Law Library may confiscate such Contraband and take any other appropriate action. "Reasonable Cause" is defined as those facts that would lead a reasonably prudent person to believe that the employee has Contraband or that Contraband is in the area to be searched. Employees should have no reasonable expectation of privacy in Marin County Law Library-supplied property such as vehicles, workstations, desks, lockers, and cabinets.

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E-MAIL, VOICEMAIL, AND COMPUTER POLICIES

Employees are expected to use e-mail, voicemail, and computer systems for Marin County Law Library business and not for personal use. Employees may access the Internet for personal reasons as long as such access is reasonable and does not interfere with the employee's work duties.

Employees may not use any e-mail, voicemail, or Internet website that may be disruptive or offend others, including but not limited to the transmission, receipt, or viewing of sexually explicit messages, cartoons, images, sounds, ethnic or racial slurs, or anything that may be construed as unlawful harassment or disparagement of others. Any such inappropriate use may result in disciplinary action, up to and including termination.

VIOLENCE PREVENTION

The Marin County Law Library is committed to providing a violence-free and safe work environment. All employees are prohibited from engaging in any violent behavior in the workplace. Such behavior includes but is not limited to brandishing a weapon, knife, or other dangerous object that could potentially harm others; physical violence or threats of violence; fighting; horseplay; verbal threats of violence; and any intimidating behavior.

Employees are required to report all threats of violence as soon as possible to their supervisor or to any other supervisor. Report all suspicious individuals or activities to the Marin County Law Library Director or to any other supervisor as soon as possible. On receiving a report of any suspected violence, the Marin County Law Library will undertake a prompt investigation and take appropriate corrective action.

ANTI-HARASSMENT POLICY

The Marin County Law Library is committed to providing a work environment free of discriminatory harassment. The Marin County Law Library's anti-harassment policy defines discriminatory harassment and sets forth a procedure for the investigation and resolution of complaints of such harassment by or against any employee, volunteer, applicant, or person providing services to the Marin County Law Library under a contract.

Discriminatory harassment violates this policy and will not be tolerated. Discriminatory harassment of an applicant, volunteer, employee, or person providing services to the Marin County Law Library under a contract includes harassment based on actual or perceived race, color, religious creed, religious dress and grooming, sex, national origin, ancestry, disability, medical condition, marital status, age (over 40), sexual orientation, genetic information, gender identity, gender expression, military or veteran status, volunteer status, unpaid intern status, or other category protected by federal or state law. Discriminatory harassment also violates the Marin County Law Library's policy not to retaliate against any individual for making a complaint of discriminatory harassment or for participating in a harassment investigation.

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You will receive a copy of the Marin County Law Library's anti-harassment policy when you join the Marin County Law Library. It is your responsibility to read and understand the policy.

IMPERMISSIBLE CONDUCT

Employees are expected to abide by all work rules and standards and to avoid conduct that is detrimental to the Marin County Law Library, other employees or patrons. Following is a list of examples of conduct that is not permitted in the workplace. The examples set forth below represent the type of conduct that you must avoid, but this is not an exhaustive list of all impermissible conduct in the workplace. Any conduct that adversely affects the Marin County Law Library or the employee's job performance or is otherwise detrimental to the Marin County Law Library, other employees or patrons may also result in disciplinary action including, but not limited to, termination. Impermissible conduct includes, but is not limited to,

- Creating conflict with co-workers, supervisors, patrons, or visitors, except to the extent permitted by law.
- Excessive absenteeism or tardiness.
- Being absent for more than three (3) days without notification or permission, except to the extent permitted by law.
- Failure to follow safety regulations.
- Using Marin County Law Library property, equipment, and resources for unauthorized purposes.
- Failing to report injuries or damage to, or an accident involving Marin County Law Library property and/or equipment.
- Incompetence or inefficiency in performing job duties.
- Horseplay that results in personal injury or property damage.
- Spreading malicious rumors.
- Engaging in vulgar or abusive language or conduct toward others.
- Using communication systems inappropriately.
- Treating supervisors, co-workers, or patrons in a discourteous, inattentive, or unprofessional manner.
- Exhibiting behaviors that would violate the drug and alcohol policy.

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- Dishonesty, including but not limited to deception, fraud, lying, cheating, embezzlement, or theft.
- Insubordination.
- Violating conflict-of-interest rules.
- Disclosing or using confidential proprietary information or trade secrets without authorization.
- Violation of the anti-harassment policy.
- Gambling on Marin County Law Library premises or while conducting Marin County Law Library business.
- Violation of safety or health rules or engaging in conduct that creates a safety or health hazard.
- Violating the anti-violence policy.
- Falsifying Marin County Law Library records.
- Conviction of a criminal offense involving moral turpitude.
- Any conduct on or off duty that negatively impacts the reputation of the Marin County Law Library.
- Violating any Marin County Law Library policy, including but not limited to any of the policies described in this Handbook.

DISCIPLINARY PROCEDURES

The Marin County Law Library may, in its sole discretion, impose different forms of discipline depending on the nature and severity of the misconduct. The discipline may take the form of oral and written warnings, reprimands, suspensions, or termination.

PERFORMANCE EVALUATIONS

The Marin County Law Library recognizes the value of performance feedback between you and the Marin County Law Library Director. The Marin County Law Library Director may review your job performance at least once a year. The performance evaluation will evaluate the strengths and weaknesses of your performance and determine what areas of improvement, if any, are needed. This is also a time in which the employee may set future performance goals with the supervisor. A good performance evaluation does not guarantee a pay raise, nor is it a promise of continued employment.

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SEPARATION PROCEDURES

On separation of employment, you must return all supplies, keys, and other Marin County Law Library property immediately. You may also be requested to participate in an exit interview, although the interview is completely voluntary. At termination, the Marin County Law Library will provide you with your final paycheck, including all accrued and unused vacation time if applicable. You and your dependents may also have a right to continue your group medical benefits temporarily under COBRA at your expense.

ACKNOWLEDGMENT OF RECEIPT OF EMPLOYEE HANDBOOK

I acknowledge that I have received a copy of the Marin County Law Library's employee handbook, have read it, and understand its provisions. I further understand that if I have a question, I am obligated to ask my supervisor for any clarification of any provisions in the employee handbook.

I further understand that the statements contained in the handbook do not create any contractual or other legal obligations of employment. I also understand that the Marin County Law Library may at any time modify, rescind, or revise any policy, benefit, or practice described in the handbook, except for its policy of at-will employment.

I understand and agree that my employment with the Marin County Law Library is at will and can be terminated by either me or the Marin County Law Library without cause or notice and that nothing in the handbook should be interpreted to the contrary. This is the entire agreement between me and the Marin County Law Library on this subject; it supersedes any prior inconsistent representations or agreements and may only be modified in a writing signed by me and the Marin County Law Library President.

I acknowledge that it is my responsibility to read and become familiar with the contents of the handbook.

Date: _____

Signed

Printed Name