

USE OF SCERA MEMBER ADDRESSES

I. INTENT

The intent of this policy is to provide the members of SCERA with information that is helpful and relevant to the members and the mission of SCERA. This policy is not intended to assist in the dissemination of information that advocates a particular point of view. The Board and SCERA shall cooperate with and assist a recognized retiree organization in distributing communications regarding membership in the organization and retiree benefit programs available through the organization to all or a portion of the retired members of the system (Gov. Code § 31592.6). The addresses of SCERA members are confidential and will not be disclosed to any party unless disclosure is authorized by the member in writing or is necessary for the administration of SCERA, as in the implementation of this policy. (Gov. Code § 31532)

II. POLICY

The Board delegates to the Chief Executive Officer of SCERA the authority to enter into an agreement with a recognized retiree organization for use of a SCERA mailing address list. This authority includes, but is not limited to, authorizing SCERA to mail the organization's approved communications, as defined below in subdivision F, to retired SCERA members under the following conditions:

- A. All labor, material, and postage costs associated with such mailing shall be borne solely by the requesting organization.
- B. The mailing service shall be performed by SCERA, or by a SCERA approved mailing service vendor.
- C. When using a mailing service vendor, the organization wishing to use the SCERA mailing list shall contract directly with the vendor or County department that has entered into a confidentiality agreement with SCERA. Confidentiality agreements will be entered at the sole discretion of SCERA and will contain terms acceptable to SCERA.
- D. The mailing service project timeline and vendors shall be at the discretion of SCERA.
- E. Distribution for a recognized retiree organization may consist of a combined mailing with SCERA materials at the discretion of the SCERA Chief Executive Officer. In the event of combined mailing, SCERA and the recognized retiree organization shall share proportional costs associated with printing, collating, and mailing. For combined mailings, SCERA may contract with a printing and mailing service or County department that has entered into a confidentiality agreement with

SCERA.

- F. All materials mailed to SCERA members are subject to SCERA review and approval. The content of the communications shall be wholly the responsibility of the organization or recognized retiree organization sending the materials and shall be related to programs or benefits offered to employees or retirees of Sonoma County or districts that participate in SCERA, or membership in or benefits offered by a recognized retiree organization. Neither SCERA nor the Board shall have any liability for the content of those communications.

III. POLICY REVIEW

This policy shall be reviewed at least every three years to ensure that it remains relevant and appropriate and shall reflect such reviews in the History, below.

HISTORY

The Board adopted this policy on 1/17/2008.

Reviewed and revised on 2/21/2013, 12/14/2017, 2/17/2022 and 1/23/2025.