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Date: January 19, 2016  
To: Board of Retirement  
From: James Wilbanks, Retirement Administrator  
Subject: Retired Member Mailing Service Policy

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Attached you will find a DRAFT Retired Member Mailing Service Policy for your consideration.

This policy is modeled on similar policies from other 1937 Act County Plans. The policy is presented for your consideration in response to some uncertainty regarding what client information may be shared with outside organizations without a release from a member. The County Employees Retirement Law ("CERL") provides for a county retirement system to assist a recognized retiree organization in Section 31592.6. The attached proposed policy clarifies the position of the MCERA Board in relation to this section.

I recommend the Board approve the attached policy.

# MENDOCINO COUNTY EMPLOYEES RETIREMENT ASSOCIATION RETIRED MEMBER MAILING SERVICE

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## **I. PURPOSE AND BACKGROUND**

The purpose of this policy is to provide the members of MCERA with information necessary to conduct the business of the system, not information that advocates a particular point of view, and to cooperate with and assist a recognized retiree organization in distributing communications regarding membership in and retiree benefit programs available through the retiree organization to all or a portion of the retired members of the system. The addresses of MCERA retirees are confidential.

## **II. POLICY GUIDELINES**

The MCERA Retirement Administrator may enter into an agreement with an organization, including a recognized retiree organization, authorizing MCERA to distribute, or cause to be distributed, written communication from such organization to the retired members of MCERA under the following conditions:

- A. All communication information materials are subject to MCERA review and/or approval. The content of the communications shall be wholly the responsibility of the organization or recognized retiree organization, and the Board shall not have any liability for the content of those communications.
- B. At the discretion of the Retirement Administrator, the mailing service shall be performed by either MCERA staff or a MCERA approved mailing service vendor.
- C. The mailing service project timeline and vendors shall be at the discretion of the Retirement Administrator.
- D. All incremental labor, material and postage costs associated with such mailing shall be borne solely by the requesting organization.

## **III. POLICY REVIEW**

This Policy is subject to change in the exercise of the Board's judgment. The Board will review this policy at least every five years to ensure that it remains relevant and appropriate and consistent with state and federal laws and regulations. In the event of legislative changes to the pertinent sections addressed in this policy, the Board will review the policy as appropriate.

## **IV. POLICY HISTORY**

The Board adopted this policy on January 19, 2016