

BUSINESS AND NONINSTRUCTIONAL OPERATIONSSolicitation for Tax Sheltered Annuities, Deferred Comp, Insurance and Other Employee Benefit Programs

The Governing Board recognizes the need to protect employees from unrequested solicitations and to assure non-interference with regular school district business. Brokers, or their representative, shall not contact any employee except at the specific request of that employee. The Board recognizes the right of employees to request appointments to discuss information. Conferences held between an employee and a representative may be held at the place of employment on the following basis:

1. Only after receiving a request for information from an employee for an appointment.
2. Providing there is no interference with the service of employees, a representative shall be permitted to discuss such information with an individual employee or a group of employees during the following times:
 - a. Preceding the employee's daily period of service.
 - b. Following the close of the daily period of service.
 - c. During the employee's own lunch period.

The broker, or broker's representative, may make presentations to employee groups when invited or requested by an employee organization or school official in accordance with the provisions of this policy. The use of school district telephone facilities to arrange appointments is prohibited.

The Board of Trustees or the administration of the Central Unified School District shall not assume any responsibility for the personal selection of any employee benefit plan by district employees.

The Board and the administration shall be responsible only for the payroll deductions and transmittal of funds authorized by employees.

Only those brokers, or their representatives, who shall abide by these regulations will be recognized by the Central Unified School District for the necessary contracts and payroll deductions. The company must be listed on the Fresno County Schools payroll deductions listing.

All brokers, or their designees doing business in the district, are to first contact the Manager of Budget and Finance. Employees are asked to report any unrequested personal or telephone solicitations or any other violations of these guidelines to the Manager of Budget and Finance.

Policy adopted: 7/24/84

Policy revised: 4/09/02