

REQUEST FOR SOLICITATION APPROVAL

Updated December 11, 2023

PURPOSE

To establish an orderly, uniform, and equitable procedure by which certified employee unions and registered employee organizations may gain access to County facilities for the purpose of marketing group insurance products not currently offered by the County and other employee benefit products or services (collectively products/services) to County employees as authorized by Section 13.16.020 of the County Code.

SUBMISSION OF REQUEST

Any insurance company seeking to market products/services at a County facility shall provide a written letter from a County Certified or Registered Employee Organization, signed by an authorized representative of that organization, to the Building Manager or designee at the desired location requesting to market said products/services. The request must include a copy of the Hold Harmless Agreement between the County and the employee organization that protects the County in the event the employee is dissatisfied with the product/service. Please note that the Hold Harmless document should include the name of the insurance company employees who are authorized to sell product/services on behalf of the employee organization.

If the facility is not fully occupied by the County, access to the building should not be granted unless the lease agreement for that contains language authorizing persons who are not County employees on the premises.

If the facility houses a County department and authority to admit persons other than County employees is granted, the request should be submitted to either the Department Head or the manager having administrative responsibility for the facility.

The request should provide the following information:

1. Name, address, telephone number and email address of the contact from the Certified/Registered organization.
2. The date, location, and time of the solicitation event. Time includes the start time and an estimated end time.
3. The name, address, telephone number, website address and group insurance number of the insurance company whose products are to be marketed.
4. The names, company affiliation, addresses (including email) and telephone numbers of the individuals who will perform the solicitation. The individual in charge must be designated. Only the named individuals are authorized to perform the event.

- Upon Building Manager or designee receiving written confirmation that the insurance company is sponsored or supported by a County Certified or Registered Employee Organization, the Building Manager or designee will forward the insurance company's request to the Chief Executive Office (CEO), Risk Management for verification of insurance compliance and for completion of a Hold Harmless Agreement. Please note, the Building Manager or designee must initiate this contact via email, with the requestor

on carbon copy. The requestors should not be sent to CEO Risk Management independently. CEO Risk Management will review the insurance information and Hold Harmless Agreement submitted, and will provide written approval of insurance compliance. The insurance company representative shall provide written approval of insurance compliance and the Hold Harmless Agreement to the Building Manager or designee for additional processing.

CEO Risk Management Contact:

Send requests to: Insurancecompliance@ceo.lacounty.gov and
Mary Lou Duran: Mduran@ceo.lacounty.gov

- Upon Building Manager or designee receiving written approval of insurance compliance and the Hold Harmless Agreement, the Building Manager or designee will forward the insurance company request to CEO Employee Relations Division. The insurance company representative shall provide a sample sign that shall be displayed at all times that identifies the sponsoring employee organization. The sign must state that the product/services being offered are neither county endorsed or sponsored. Examples of the type of materials and website links and/or calculators/tools (collectively “materials”) that will be available to County employees must also be provided to CEO Employee Relations before said materials are made available to County Employees. The insurance company is also required to send updated materials to CEO Employee Relations for review and re-approval when already approved materials are updated, replaced or new materials are introduced. CEO Employee Relations must provide written approval to the insurance company representative. The insurance company representative shall provide the CEO Employee Relations written approval to the Building Manager or designee.

CEO Employee Relations Division Contacts:

BenefitSolicitation@ceo.lacounty.gov

- Upon the Building Manager or designee receiving a written letter from a County Certified or Registered Employee Organization signed by an authorized representative of the organization, written approval of insurance compliance, the Hold Harmless Agreement, and CEO Employee Relations written approval, Building Management will notify the insurance company that they have been approved and will coordinate with the insurance company to schedule a date/time to solicit at the designated County facility.

Note: All companies are required to schedule appointments at other County facilities directly with the facilities manager at those facilities.

- Insurance companies are required to adhere to the request and approval process outlined herein with each facility before soliciting County employees. Be advised that the approval process may vary from one facility to the next, at the Building Managers or designee's discretion.

GENERAL REQUIREMENTS

Insurance Companies engaging in solicitation activities on County premises must comply with the following general requirements:

- Insurance Company must be approved by the Building Manager or designee.
- Insurance Company must display a current Hold Harmless Agreement at their table always.
- Insurance Company may not use the County seal on any documents being used or handed out to County employees, including business cards.
- Insurance Company may not offer a raffle of services, products or prizes. No raffles.
- Insurance Company may not sit at or stand in front of tables or banners in which the County seal is marked.
- No solicitations may interfere with County operations or the public's access to County services.
- No employee may be solicited during working hours.
- County email, telephones, or any other electronic media cannot be used for solicitation.
- All solicitation activities must take place in space that is considered public area. The Building Manager shall be the final authority in determining the location of solicitation events.
- Insurance Company must provide and prominently display a sign that identifies the sponsoring employee organization, and which must state that the product/services being offered is neither county endorsed or sponsored. Failure to display signage will result in temporary or permanent suspension of building access.
- Insurance Company representatives are responsible for arranging their own parking.
- Tables and chairs are available but are on a first come first serve basis. Insurance Company may provide their own table and chairs.
- A maximum of two representatives, per insurance company, are allowed on the approved list at one time.
- Insurance Company may schedule up to two solicitation appointments at the designated County facility per month.
- With respect to certified County unions, any posting, flyers, or display of material relating to the solicitation activity or products being sold must conform with the Bulletin Board provisions contained in existing Memoranda of Understanding.
- With respect to the registered employee organization, no such materials may be posted or displayed at any location without the prior approval of the manager in charge of the facility. Materials posted by registered organizations must pertain to the group insurance being offered.
- The participants in each solicitation event must report to and identify themselves to the manager, or his/her designee upon arrival at the site.