



Member-Only Benefits Provider Policy

I. Member Benefits Generally

The CCCBA offers certain member benefits programs to its members through outside entities that provide products and services. These entities, once approved by the CCCBA, have the status of Member Benefits Providers and desire to offer some type of benefit (whether discounted pricing or value added products or services) to members of the CCCBA that would not otherwise be available to non-CCCBA members or the general public.

II. Selection Process for Member-Only Benefits Provider Status

A company or person may apply for Member-Only Benefits Provider (“MBP”) status to the CCCBA by completing the [CCCBA Member-Only Benefits Provider Application](#). In some instances, CCCBA staff may request that the application be vetted by the Membership Committee. Certain vendors are not appropriate as MBPs, such as those that offer goods or services that have questionable legality, or involve potential ethical issues or dilemmas. No more than three MBPs from the same industry (excluding attorneys) may be on our list each year.

III. Memorialization of Agreements with Member-Only Benefits Providers

The CCCBA shall be tasked with memorializing agreements with all MBPs. The agreements may be memorialized in letter format or contract format, and should specify:

- A. The special benefit offered to the members of the CCCBA;
- B. Any advertising or sponsorship commitments by the vendor; and
- C. The process to ensure benefits are provided to only CCCBA members

IV. Categories of Goods or Services Not Appropriate for Member-Only Benefits Provider Status

Certain types/categories of vendors are not appropriate as Member-Only Benefits Providers. They include, but are not necessarily limited to:

- A. Vendors that offer goods or services that have questionable legality, or involve potential ethical issues or dilemmas; or
- B. Wealth managers who only offer individual wealth management services to members, vs. a menu of services that support a member's full practice.

V. Expectations for Existing Member-Only Benefits Providers

MBPs are expected, at their expense, to promote their goods and services, and the agreed-upon special benefit, to CCCBA members for their consideration. The initiative to do such promotion must come from the MBPs themselves. The CCCBA will promote Premium Level MBPs through emails to members and with special recognition in the January issue of the Contra Costa Lawyer.

Both Premium and Regular level MBPs will be listed on the CCCBA website and the January issue of the *Contra Costa Lawyer*.

MBPs are expected to consider promoting their goods and services, and the special benefit they offer to CCCBA members, through advertising in the CCCBA publications (the weekly email broadcast and the *Contra Costa Lawyer* and website ads at www.cccba.org), and through sponsorship of or participation in CCCBA events.

The CCCBA shall review existing MBPs in the year prior to the expiration of each Provider's agreement, and earlier if deemed necessary or prudent, to determine:

- A. Whether the Member-Only Benefits Provider has been promoting its goods or services to the CCCBA membership;
- B. Whether the Member-Only Benefits Provider has taken steps to proactively communicate with the CCCBA staff regarding its promotional campaign, success, ideas, etc.