



**Linking People,
Learning & Performance**
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www.astd.org

Dear Prospective Member:

Thank you for your interest in the ASTD Benchmarking Forum. I am pleased to forward copies of our informational brochure, a list of current Benchmarking Forum members, and an application packet for your review.

The Benchmarking Forum's current initiatives include qualitative and quantitative benchmarking, recognition and dissemination of best practices, analyzing trends that affect organizational learning and performance improvement, and comparative data analysis. Forum members meet at least twice each year to learn about their own best practices, engage in discussions with invited experts, and share information in group discussions regarding their own organizations' challenges and solutions. Some meetings are held outside the US, as we have several international members, and most of our companies are global.

Membership in the Benchmarking Forum entails annual dues. The dues for each of the first two years are \$8,500 and \$6,000 for each year beyond. The Benchmarking Forum's Advisory Group, made up of six representatives from member companies and ASTD's Benchmarking Forum Manager, reviews all applications for membership.

What is the value of membership in the Benchmarking Forum? In an evaluation of the 2001 Benchmarking Forum, members estimated that their participation in the Benchmarking Forum resulted in an average performance improvement in their training or learning departments of approximately 7 percent, and 13.45 percent improvement in their own performance. One member believes she saved her company \$48,000 by attending just one meeting where she networked with peers and found a suitable competency framework that she would have otherwise have had to research, design and develop.

Should you have any questions, please feel free to call me at your convenience. I can be reached at 703.683.8126. I would be happy to talk with you further about the privileges and responsibilities of membership.

Sincerely,

Mike Czarnowsky
Benchmarking Forum Director
ASTD

Membership Application Procedures

Application Packet

Membership in the ASTD Benchmarking Forum is by application only. The application consists of the following:

- I. **Letter of Intent**
- II. **Ethics Agreement**
- III. **Applicant Profile**
- IV. **Statement of Shared Learning**
- V. **Areas of Expertise**
- VI. **Guidelines for Continuing Membership**

Membership Criteria

The Advisory Group will take into consideration the following when reviewing applications:

- overall quality of applicant organizations
- maintaining balance in the size and growth of the Benchmarking Forum
- representation among a range of industries
- representation within the Benchmarking Forum of emerging and critical skills, processes, and areas of expertise (i.e., learning technologies, outsourcing, knowledge management, international training models, etc.)
- seniority and positions of representatives within applicant organization

Successful applicants:

- are committed to being leaders in world class training, learning, and performance improvement activities within and throughout their organization
- share information related to their world-class training, learning, and performance improvement activities
- have at least one example of “excellence-in-practice”
- commit to being an active participant in the Benchmarking Forum, with appropriate senior-level representation

Application Review

ASTD's Benchmarking Forum staff will review all application materials prior to consideration by the Benchmarking Forum's Advisory Group. Applications will not be forwarded to the Advisory Group for membership consideration until all items are completed and approved by ASTD's Benchmarking Forum staff.

Please direct all questions regarding the application to:

Mike Czarnowsky
Benchmarking Forum Director
ASTD
703.683.8126
mczarnowsky@astd.org

Email final application packet to:
benchmarkingforum@astd.org

Mail hard copy with signatures to:

Tony Bingham
President and CEO
ASTD
1640 King Street
Alexandria, VA 22313, USA

I Membership Application Letter of Intent



[ON YOUR COMPANY or AGENCY'S LETTERHEAD]

[Date]

Tony Bingham
President and CEO
ASTD
1640 King Street
Alexandria, VA 22313

Dear Mr. Bingham:

[Your company/agency] is pleased to apply for membership in the American Society for Training & Development's Benchmarking Forum.

I understand that membership in the Benchmarking Forum entails a pledge of \$8,500 per year for each of the first two years of membership and \$6,000 per year thereafter. The initial pledge of \$8,500, payable to the American Society for Training and Development, is required for membership and will be paid upon admittance to the Benchmarking Forum.

In addition to this financial commitment, [your company/agency] agrees to abide by the Benchmarking Forum Ethics Agreement for the open and equal sharing of training information. We also understand the importance of providing appropriate senior staff leadership to attend meetings and speak on behalf of [your company/agency], and of providing sufficient staff time to collect and validate benchmarking information.

Please find enclosed:

- a signed Ethics Agreement
- a completed Applicant Profile
- a completed Statement of Shared Learning
- a completed Areas of Expertise document
- a signed Guidelines for Continuing Membership document

This letter constitutes our intent to participate as a full and wholehearted member of the ASTD Benchmarking Forum, and to provide the staff and financial commitment outlined above.

Sincerely,

[Signature and title of representative for your company/agency]

Enclosures

II Membership Application Ethics Agreement



[ON YOUR COMPANY or AGENCY'S LETTERHEAD]

American Society for Training & Development
Benchmarking Forum
Ethics Agreement

The Benchmarking Forum provides a venue for organizations to benchmark their training, learning, and performance improvement processes, practices, and services against each other. The Benchmarking Forum is comprised of companies and public sector organizations based in many countries. Using the tools and techniques of benchmarking, members share information and seek best practices to improve the effectiveness of their organizations.

The guiding principle of the ASTD Benchmarking Forum is the open and equal exchange of information regarding the training organizations of members. To ensure the professionalism and effectiveness of the Benchmarking Forum **[Company/Agency Name]** agrees to abide by the following ethical principles for participation.

Purpose of the Benchmarking Forum

- The ASTD Benchmarking Forum is a venue for cooperative benchmarking, shared learning, and strategic networking. At no time will the Benchmarking Forum, including its data, meetings, membership directories, or other resources, be used for the purpose of marketing products or services of one member organization to other members of the Forum.

Information Exchange and Commitment

- All Benchmarking Forum members must be willing to share the same type and level of information. The ASTD Benchmarking Forum reserves the right to regulate individual organization access to Forum-wide data based on the member's willingness, effort and ability to contribute data.
- ASTD Benchmarking Forum members will provide appropriate senior staff leadership to attend meetings and speak on behalf of their organizations, allocate sufficient staff time to collect benchmarking information, and apply the necessary expertise to ensure the validity of information provided to the Benchmarking Forum.
- Requests for additional benchmarking information among ASTD Benchmarking Forum members made independently of ASTD are separate from the activities of the Benchmarking Forum. Fulfillment of such requests is at the discretion of the individual organizations involved.

Confidentiality

- All information **specific to member organizations** collected by the ASTD Benchmarking Forum is considered strictly confidential, and may not be communicated outside the Benchmarking Forum without the prior consent of the member that provided the information.
 - ◊ ASTD Benchmarking Forum member-specific data is strictly for use to benefit Benchmarking Forum members. Member-specific data may be freely shared with all internal training departments and staff, but may not be communicated to clients, customers, business partners, or any other consortia of individuals or organizations.
 - ◊ It is the responsibility of the representatives to the Benchmarking Forum to control access to the member-specific information and ensure that individuals using the information within their organizations understand and abide by the Benchmarking Forum's principle of confidentiality. All requests for information received by ASTD from employees of member organizations other than the designated Forum representatives will be directed to those representatives.
- Select **summary statistics** of ASTD Benchmarking Forum information may be made available to non-Forum organizations. This type of information includes averages, ranges, aggregates, and other secondary data that is not member-specific and does not permit identification of a particular member organization.
- While the names of the Benchmarking Forum's member organizations are public information, the names and contact information of representatives are strictly confidential. Names, titles, addresses, and telephone numbers of representatives cannot be shared with anyone without the prior consent of the individual.
- In the event that an organization terminates its membership in the ASTD Benchmarking Forum, they will agree to protect the confidentiality of member-specific data and all other Benchmarking Forum information.

Uses of Benchmarking Information

- All information collected by the ASTD Benchmarking Forum will be used only for the improvement of training practices and procedures. Data collected by the Forum will not be used for pricing, or as a means to market or sell products and services.

As representatives to the ASTD Benchmarking Forum, **[Company/Agency Name]** agrees to share benchmarking information in accordance with these guidelines. We understand that failures to comply with these ethical principles will be individually addressed by the ASTD Benchmarking Forum and may result in the termination of membership.

Name

Name

Title

Title

Signature

Signature

Date

Date

III Membership Application

Applicant Profile



Please respond in sufficient detail to each item below. ASTD will request additional information, if necessary, before forwarding an application for consideration by the Benchmarking Forum's Advisory Group.

A. Company/Agency Information

1. Company/Agency name
2. Brief history (*year founded, significant milestones*)
3. Primary business activities
4. Number of employees
5. International presence

B. Contact information for each of the two senior-level representatives to the Benchmarking Forum.

1. Name and Title
2. Full Mailing Address
3. Phone and Fax numbers
4. Email address

If the above-listed senior level representatives would like to designate someone else to participate in the day-to-day contact and communication ongoing in the Benchmarking Forum, please list that person

1. *Name and Title*
2. *Full Mailing Address*
3. *Phone and Fax numbers*
4. *Email address*

C. Please provide an organizational chart of the company's/agency's training, learning, or performance improvement services. Please indicate where on the organizational chart the two named representatives are found.

D. Training, Learning, or Performance Organization Information

(At a minimum, this information should be provided for each training, learning, or performance improvement organization from which the representatives come)

1. Business unit(s) served (*if different from above*)
2. Number of employees served
3. Philosophy of the training organization
4. Budget
5. Size of the training organization's staff
6. Types of training / services provided
7. Delivery systems used (*classroom, computer-based, EPSS, etc.*)
8. Awards won

V Membership Application

Areas of Expertise



This form is for tracking the professional expertise of individuals within your organization. It is not intended for individuals with “interest” in a topic, but rather for professionals with extensive knowledge and experience to answer questions and to provide insight on a particular topic. Please indicate if this is an expertise of the first representative, the second representative or found within your organization.

Organization: _____

1st Representative's Name: _____

2nd Representative's Name: _____

Areas of Expertise	1st Re p	2nd Re p	Org	Areas of Expertise	1st Re p	2nd Re p	Org
1. 360-degree feedback	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	21. measurement and evaluation	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
2. building training alliances	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	22. organizational culture/climate	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
3. career development	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	23. organizational development	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
4. change management	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	24. organizational learning	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
5. coaching/mentoring	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	25. outsourcing	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
6. competency modeling	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	26. performance consulting	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
7. corporate universities	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	27. performance improvement	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
8. cross-cultural training	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	28. quality	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
9. delivery strategies (general)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	29. rapid design/development	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
10. design and development	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	30. return on investment (ROI)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
11. developing strategy and training policy	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	31. scenario planning	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
12. diversity training	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	32. succession planning	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
13. employee attitude issues	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	33. systems thinking	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
14. knowledge management	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	34. tacit learning	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
15. leadership development	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	35. team development	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
16. learning environment	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	36. technical training	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
17. learning organizations	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	37. training needs assessment	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
18. learning technologies	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	38. virtual organizations	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
19. managing downsizing issues	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	39. other: _____	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
20. management of training function	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	40. other: _____	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

VI Membership Application Guidelines for Continuing Membership



Membership responsibilities continue throughout an organization's tenure in the Benchmarking Forum. The following guidelines explain how members may maintain their membership in the Benchmarking Forum.

GUIDELINES FOR CONTINUING MEMBERSHIP	
Shared Learning	Demonstrate commitment to actively sharing experiences and information by: <ul style="list-style-type: none"> • attending Benchmarking Forum meetings • facilitating discussions at a Benchmarking Forum meeting • participating in one-days meetings or working groups • submitting or reviewing Excellence in Practice nominations • submitting questions for and responding to member-to-member Quick Bench surveys
Representation	<ul style="list-style-type: none"> • Provide two senior level learning/performance professionals from within the organizations as representatives to complete surveys, attend meetings, etc. • Attend at least one meeting per year.
Data Sharing	Provide at least one set of data to the Benchmarking Forum each year. This information must be returned in a complete, accurate, and timely manner.
Hosting Meetings	Be prepared to host a meeting.
Invoices	Pay all invoices within 30 days.
Expertise	Continue to represent and share an area of expertise of benefit to the Benchmarking Forum.

Members will be reviewed during their active status in the Benchmarking Forum approximately once every two years. The Advisory Group may choose to place a member on probation for a one-year period prior to revoking their membership if membership criteria are not met. ASTD's Benchmarking Forum staff will review advisory group members.

The undersigned representatives understand and agree to meet the responsibilities of continuing membership in the ASTD Benchmarking Forum.

Name
Title
Organization
Signature
Date

Name
Title
Organization
Signature
Date