

# Membership Application

ISA was founded in 1978 and is the only association devoted exclusively to helping executives in the training, learning and performance consulting industry grow their businesses.

- Membership in ISA is open to any organization whose business is dedicated to the transfer of learning and knowledge for work related performance.
- A minimum of \$500,000 in annual revenues is required of membership applicants.
- All information on this form will be treated confidentially by ISA.
- All questions must be answered completely for this application to be accepted.
- Payment must be received with the application to activate membership.
- The application will be reviewed by ISA. If there are any questions about the information provided, you will be contacted.
- By signing the application your firm is agreeing to follow the anti-trust policy and the fundamentals of ISA.

## ISA Membership Application - CHECKLIST

To expedite access to ISA membership for you and members of your company, please review this checklist to insure all necessary information requested in the membership application is completed.

If you have any questions please contact the ISA Office at 202-568-1418.

- \_\_\_ Company description of 150 words or less is attached.
- \_\_\_ "Tweet" of company description equaling 144 total characters or less is included.
- \_\_\_ Contact information for firm's designate & senior level staff members is included.
- \_\_\_ Payment for membership is provided by check or credit card.
- \_\_\_ ISA ByLaws and AntiTrust Guidelines were reviewed and will be complied with.

# ISA Value Proposition

*Enabling you, your business, and your customers to improve the world of work.*

## Your Business Will be Better

- Timely industry knowledge and practices
- Road-tested wisdom from thought leaders
- Crowdsourced, research-backed and peer best practices that increase your organization's impact and reach
- Challenging conversations that provoke positive business change
- Proprietary benchmarking and research
- A unique and safe space to share, learn from and benefit from your competitors and partners
- Practices that will help your organization grow more profitably and sustainably

## YOU Will be Better

- A like-minded community of kindred spirits
- Trusted mentorship that moves you forward
- Intellectual stimulation
- Professional development designed specifically for business leaders, partners and owners
- An opportunity to step outside your everyday "bubble" and widen your view
- Meaningful and enduring friendships
- The confidence and support that comes with knowing you don't have to go it alone!

## Your Customers and the World of Work Will be Better

As ISA members and their businesses grow and improve, the impact we have on our customers and society becomes more substantial. Ultimately, ISA members are helping to create workplaces that are more humane, just, diverse, productive and joyful!



*Bold Thinking. Smart Growth.*

## Part I - Information About Your Organization

- A.** Name of organization \_\_\_\_\_  
Address \_\_\_\_\_  
\_\_\_\_\_  
Phone \_\_\_\_\_ FAX \_\_\_\_\_  
Website address: \_\_\_\_\_  
Email: \_\_\_\_\_
- B.** Name of individual completing this application: \_\_\_\_\_  
Title \_\_\_\_\_  
Phone \_\_\_\_\_ FAX \_\_\_\_\_  
What is your role at the firm?  
\_\_\_\_ Owner \_\_\_\_ Founder \_\_\_\_ Sr. Executive \_\_\_\_ Other: \_\_\_\_\_
- C.** Please list two clients who have used your program(s) or service(s):
- |               |               |
|---------------|---------------|
| Name _____    | Name _____    |
| Title _____   | Title _____   |
| Company _____ | Company _____ |
| Phone _____   | Phone _____   |
- We will not contact clients without contacting you first.*
- D.** Date (month/year) firm was established: \_\_\_\_\_
- E.** Number of employees: \_\_\_\_\_
- F.** Annual Revenue: \_\_\_\_\_
- G.** Please attach a mission statement for your organization.

**H. ISA’s greatest resource is networking and shared experience. By completing this section of the application ISA can help connect you with other firms that are similarly focused.**

Select **the top five** subjects about which your firm primarily builds its services and/or products. Please **rank** them from 1 (highest percentage) to 5 (lowest percentage).

- |  |   |  |
|--|---|--|
| <input type="checkbox"/> Career Development                          | <input type="checkbox"/> Employee Recruitment<br>Selection/Staffing | <input type="checkbox"/> Presentation Skills             |
| <input type="checkbox"/> Executive Development                       | <input type="checkbox"/> Problem Solving                            | <input type="checkbox"/> Process Mapping                 |
| <input type="checkbox"/> Change Management                           | <input type="checkbox"/> Facilitation Skills                        | <input type="checkbox"/> Project Management              |
| <input type="checkbox"/> Coaching                                    | <input type="checkbox"/> Instructional Systems Design               | <input type="checkbox"/> Sales Training                  |
| <input type="checkbox"/> Communication Skills                        | <input type="checkbox"/> Leadership                                 | <input type="checkbox"/> Supervisory Training            |
| <input type="checkbox"/> Computer Literacy/<br>Basic Computer Skills | <input type="checkbox"/> Management Skills/<br>Development          | <input type="checkbox"/> Teams/Team Building             |
| <input type="checkbox"/> Conflict Management                         | <input type="checkbox"/> Negotiation Skills                         | <input type="checkbox"/> Technical Skills Training       |
| <input type="checkbox"/> Creativity                                  | <input type="checkbox"/> New Methods/Procedures                     | <input type="checkbox"/> Time Management                 |
| <input type="checkbox"/> Customer Service/Client<br>Relations        | <input type="checkbox"/> Organizational Change                      | <input type="checkbox"/> Total Quality Management        |
| <input type="checkbox"/> Diversity                                   | <input type="checkbox"/> Personal Development/Growth                | <input type="checkbox"/> E-learning/Technology Platforms |

\_\_\_\_\_  
(Other)

**I. ISA offers programs and services specifically for the senior level staff within an ISA firm. To insure that your staff receive appropriate announcements, please list members of your firm according to the titles below. If your firm does not have a position listed below or the title is different please indicate that on this form.**

Title	Name	Phone	E-mail	Fax
CEO				
VP/Marketing				
VP/Sales				
VP/Business Development				
VP/Products & Services				
CFO				
VP/Operations				
VP/Research				
VP/Technology				
OTHER				

**J.** *In order for ISA to comply with Federal Guidelines, by completing and signing this form you are permitting ISA to contact the firm and all individuals indicated within the firm about upcoming programs and communications via e-mail, fax, text and phone.*

\_\_\_\_\_ Yes, I agree that ISA can communicate via e-mail, fax, text and phone to the firm's staff regarding ISA membership benefits and programs.

**K.** Describe your firm as you would to a potential client. The text you provide will be used in preparing your firm's description/entry in the membership directory. ***Please limit your description to no more than 150 words.*** (You may want to include industry or audience segments you focus on, as well as areas that differentiate you within the industry.)

**L.** Have you attached or e-mailed files of your designate's photo for the member directory?  
\_\_\_\_\_ Yes          \_\_\_\_\_ No

## Part II - Responsibilities of ISA Member Firms

### A. ISA Membership Criteria.

#### ISA Members:

- intend to develop and improve their businesses and are committed to growth;
- have owners/founders/CEOs (or their equivalent) who commit to active involvement in the association;
- create and distribute proprietary products and/or services as a critical strategic factor;
- have a minimum sales income level of \$500,000 in the calendar year prior to the year they apply for ISA membership;
- provide the majority of their products & services to clients external to their organizations;
- use learning/training/development technologies as a primary intervention.
- participate in ISA to learn, contribute and add value but not to actively sell to or buy from other ISA members.

Have you read the membership criteria and believe your firm meets these criteria?

Yes     No     I would like to discuss the criteria with someone.

Please review the ISA Bylaws at your earliest convenience. You can access the document by **clicking here**.

### B. Anti-Trust Guidelines

Antitrust laws are intended to preserve competition by, among other things, prohibiting agreements, combinations and conspiracies in restraint of trade. As groups of competitors working together, trade associations are subject to particular antitrust scrutiny. ISA has a policy of strict compliance with federal and state antitrust laws. ISA members should avoid discussing certain subjects when they are together – both at formal ISA meetings and in informal contacts with other industry members – and should otherwise adhere strictly to the guidelines that follow.

ISA members should always avoid conduct which would violate the antitrust laws in the ordinary course of business, such as:

- ◆ *Price-Fixing, Bid-Rigging and Resale Price Maintenance*, which are *per se* illegal;
- ◆ *Group Boycotts*, which also are generally *per se* illegal;
- ◆ *Tying and Reciprocity*, or the sale of one service or commodity on the condition that the customer also must buy some other service or commodity from the seller, which may be illegal under certain circumstances;
- ◆ *Exclusive Dealing Agreements*, which provide that a buyer will purchase its full requirements from a single seller or that a seller will commit its output to a single buyer, also may be illegal under certain circumstances;
- ◆ *Price Discrimination*, which is often illegal under the Robinson-Patman Act;
- ◆ *Monopolization and Attempts to Monopolize*; and
- ◆ *Unfair Methods of Competition*.

Annual membership dues are as follows (mark applicable):      \$8995 per member firm (annual revenue \$2M+ annually);      \$5995 for annual revenue of less than \$2M annually). Membership dues may be paid in quarterly installments. Credit card payments will be charged against your credit card on the first day of each quarter. **A quarterly processing fee of \$20 will be charged for the convenience of quarterly dues payments.** Please insert billing address below if different than shown on page 3:

Amount of check attached or credit card payment                   \$ \_\_\_\_\_

     American Express        MasterCard                VISA

Credit card # \_\_\_\_\_ Exp \_\_\_\_\_

Signature \_\_\_\_\_

Would you prefer quarterly dues installments?        YES                        No  
Please sign here to authorize quarterly credit card charges to the card on file.

\_\_\_\_\_

- D. Annual Financial Survey** - ISA values sharing among member firms. ISA's Financial Survey is a core business sharing aspect of ISA membership. All information is handled anonymously and confidentially by a third party research firm. This is the only survey of its kind in the industry.

As a member, will you make every effort to participate in the annual ISA Financial Survey?  
     Yes                No

- E. Annual Business Retreat** - ISA holds its Annual Business Retreat in the spring each year. ISA's Annual Business Retreat gives senior leaders a chance to focus on the business rather than working in it! Over the course of three days, educational sessions are offered on such issues as financial performance, product development, customer loyalty, employee hiring and retention, copyright issues and more. Facilitated networking sessions allow small groups of owners and senior executives to work together, sharing perspectives and solving problems unique to the industry. Attendance by your firm's designate and CEO is important.

Who will be attending the Annual Business Retreat from your firm? \_\_\_\_\_

- F. C-Level Forums** - ISA members convene to "dig deep" on self-selected issues at ISA C-Level Forums. Led by experienced CEO group facilitators, small groups explore insights and potential solutions/options about their individual issues.

Who will be attending C-Level Forums? \_\_\_\_\_

- G.** By signing this application you agree to support and uphold the Vision, Mission, Imperatives and Values as stated on page three of this application.

\_\_\_\_\_  
Designate's Signature

\_\_\_\_\_  
Title

\_\_\_\_\_  
Date

**Please email to [bguthrie@isaconnection.org](mailto:bguthrie@isaconnection.org) OR print / mail your completed form and check or credit card payment to:**

**ISA-The Association of Learning Providers  
5868 Mapledale Plaza #135, Dale City, VA 22193 - Ph. 202.568.1418**