

ISA-The Association of Learning Providers

THE WHO WE ARE, WHY, HOW AND WHAT

WHO ARE WE?

Founded in 1978, we are the exclusive association supporting executives in growing their businesses in the talent development industry. Our members, the best in their field, include pioneers and innovators driving industry transformation. With a shared passion for learning, new ideas, and business success, we thrive in the industry we love.

WHY DO WE EXIST?

As ISA members and their businesses flourish, our influence on customers and society amplifies.

We contribute to the creation of workplaces that prioritize human well-being, equity, diversity, productivity, and vitality.

ISA serves as an invaluable asset for strategic growth, expertise, innovative ideas, and best practices in the talent development industry. Our members, involved in training, coaching, learning, consulting, and related technologies, rely on ISA for a competitive edge. *Ultimately, our customers and the global work landscape benefit greatly from the positive impact of ISA.*

VALUE PROPOSITION: HOW WE DELIVER IT?

Your Business Will Be Better

- Timely industry knowledge and best practices.
- Insights from thought leaders and seasoned practitioners.
- Crowdsourced and research-backed strategies for greater impact.
- Challenging conversations that drive positive change.
- Proprietary benchmarking and research.
- Collaborative environment to learn from competitors and partners.
- Practices for profitable and sustainable growth.

VALUE PROPOSITION: HOW WE DELIVER IT?

YOU Will be Better:

- Vibrant community of kindred spirits, sharing challenges and experiences.
- Trusted mentorship for personal growth.
- Intellectual stimulation to expand knowledge.
- Tailored professional development for business leaders.
- Broadened perspective beyond your everyday bubble.
- Meaningful and lasting friendships.
- Confidence and support in knowing you're not alone.

OUR VALUES

Build on Success

Keep members ahead on crucial issues affecting business health and growth.

Foster Connected Community

Foster a connected community leveraging ISA's trustworthy network and expertise.

Ignite Innovative Thinking

ISA encourages diverse perspectives to shape multiple dimensions and ignite industry innovation.

Live Inclusion

Foster an association that allows all people to be seen, heard, understood, respected, and feel part of what we do

OUR ARTICLES OF ASSOCIATION

ISA member companies collaborate to grow their businesses and the talent development industry, encompassing training, learning, consulting, and supporting technologies. Our adherence to the following Articles of Association includes:

- Regular participation of company principals in association activities.
- Upholding the good faith of the association by refraining from directly recruiting individuals from member companies.*
- Respecting the copyrights and intellectual property of fellow member firms.
- Avoiding proactive marketing of services to other ISA members.
- Agreeing to comply with Antitrust Guidelines and Articles of Association as a membership requirement.

* This provision restricts formal recruiting by senior or HR employees of an organization from directly reaching out to individuals at other ISA member firms with explicit recruitment intentions. It does not apply to accepting applications or outreach resulting from recruitment advertisements, recommendations from non-senior/non-HR employees, or recommendations from vendors or business associates.



Membership Application

ISA–The Association of Learning Providers 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 \$500K, and no maximum, 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, along with the approved 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
- Payment for membership is provided
- ISA ByLaws and AntiTrust Guidelines were reviewed and will be complied with by all member firm participants
- Contact information for firm designate & all strategic/senior-level team members
- Complete your member listing/profile with your picture/logo on the ISA website for firm designate & all strategic/senior-level team members (ISA will send you login information after your application has been approved)

Part I - Information About Your Organization

A. Formal Name of Organization and any dba Names: _____

Address: _____

Phone: _____ Secondary # : _____

Website Address: _____ Email: _____

B. Name of individual completing this application: _____

Title: _____ Cell: _____ Email: _____

What is your role at the firm? Owner Founder Sr. Executive Other: _____

C. Please list a minimum of two clients who have used your program(s) or service(s):

Client Business	% of business revenue for past year	Contact Name & Title

We will not contact clients without contacting you first.

D. Date (month/year) Firm was established: _____

E. Number of Employees: _____

F. Annual Revenue for past year: \$ _____

(This number is important to determine your membership dues and participation in similar sized company member programming and discussions.)

G. Please include 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.

Check up to the top five subjects about which your firm primarily builds its services and/or products.

<input type="checkbox"/> Career Development	<input type="checkbox"/> Employee Recruitment/ 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/ Basic Computer Skills	<input type="checkbox"/> Management Skills/ 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 Relations	<input type="checkbox"/> Organizational Change	<input type="checkbox"/> Total Quality Management
<input type="checkbox"/> DE&I	<input type="checkbox"/> Personal Development/Growth	<input type="checkbox"/> E-learning/Technology Platforms
<input type="checkbox"/> Other _____	<input type="checkbox"/> Other _____	<input type="checkbox"/> 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 all executive strategic leadership team members within your firm. If your firm does not have a position listed below or the title is different, please revise the titles that on this form.

Title	Name	Direct Phone	E-mail	Cell
CEO/President				
Marketing				
Sales				
Business Development				
Products & Services				
CFO				
COO				
Strategy				
CTO/CIO				
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. ATTACH a COMPANY DESCRIPTION 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. (You may want to include industry or audience segments you focus on, as well as areas that differentiate you within the industry.) *Please limit your description to no more than 150 words.*

I agree that our organizational executive strategic team leaders will create ISA website logins and member listings upon membership acceptance.

Part II - Responsibilities of ISA Member Firms

1. Annual Financial Benchmarking Survey - ISA values sharing among member firms. Our 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. It is understood that membership includes study access but that participation is required to access the results and related programming.

We will make every effort to participate in the annual ISA Financial Survey.

Who is the main financial strategic leader from your firm? _____

2. Annual Business Retreat - ISA holds its Annual Business Retreat (ABR) each year. The 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 and intentional networking sessions allow small groups of owners and senior executives to work together, sharing perspectives and solving problems unique to the industry. It is understood that membership includes (one) designate ABR registration. Additional member attendance require registrations and payments.

Attendance by your firm's designate and CEO is important.

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

3. C-Level Forums - ISA members convene to "dig deep" on self-selected business issues at CLevel Forums. Led by experienced CEO group facilitators, small groups of C-suite leaders explore insights and potential solutions/options about their individual issues. Commitment of time and pre-work is required to participate.

Who will be attending C-Level Forums? _____

4. 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

5. Review the ISA Bylaws and Anti-Trust Guidelines

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*.

Have you read the Anti-Trust Guidelines and believe your firm will honor these criteria?

Yes No

7. 2024_MEMBERSHIP FEE OPTIONS:

2024 annual FIRM membership dues are as follows and include your strategic leadership team in various programs. Your past year revenue totals determine your membership due rate. Your annual due also includes (1) designate registration fee to our Annual Business Retreat (proper registration still required; all other attending team members must pay an additional ABR member-only registration fee).

If your firm's annual revenue is \$2M+, then the annual membership due is \$9,450

If your firm's annual revenue is less than \$2M, then the annual membership due is \$6,295

Membership dues are a cash paid price. As a courtesy, merchant service credit card payment options are available at an additional expense. Ask for your invoice to be designed to match your desired payment option(s).

As a courtesy, installment payments are available but does not reduce the required full annual payment. No mid-year refunds and/or cancellations are available. An installment processing fee of \$50 per installment will be added for the convenience of each payment (this is different from merchant service options).

MasterCard Visa American Express Company Check

\$6,295 \$9,450

Our firm chooses to pay the membership dues cash price and will mail in a check with no additional charges.

Our firm chooses to pay via credit card and accepts that merchant service charges will be added to the invoice.

Our firm wishes to pay membership due with the courtesy installment option and accepts that an installment processing fee will be added to the invoice(s).
The entire annual dues amount is required; there are no partial refund or cancellation options within a given year.

By signing below, you authorize all required annual payments based on supplied choices above (including the balance of installment payments requested):

By signing this application, you agree to support and uphold the Vision, Mission, Imperatives, Values and Articles of Association expressed throughout this application.

Designate's Signature _____ Title _____

***Please email this completed application to info@isaconnection.org .
You can mail company check payments, separately, to our corporate address:***

**ISA-The Association of Learning Providers
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