

Benchmarking Committee Guidelines

The mission of the Benchmarking Committee (BC) is to design, develop, execute and distribute reports of benchmarking surveys and studies on strategically selected topics. Duties include:

1. Maintain the Benchmarking Committee policies and procedures to include the UNICON Antitrust/Competition Policy (Appendix A)
2. Present proposals to the board for future surveys and studies
3. Form actionable surveys and studies based on the board and committee recommendations
4. Manage project budget, progress and quality
5. Design and deliver surveys and studies to the membership or target audience, and manage the data processing
6. Provide an executive overview for all Benchmarking reports
7. Present survey results to the members in a timely and effective manner
8. Working with the Executive Director, provide the UNICON board with a committee report at each Board meeting
9. Co-chair(s) to work effectively with other Benchmarking Committee members to ensure they are actively involved and participative
10. Co-chairs to maintain appropriate membership staffing for their respective committee
11. Oversee the Technology Disruptors Working Group (TDG)

Responsibilities

1. Conduct a minimum of two surveys or studies per year
 1. One survey will be the annual “State of the Industry/Membership Benchmarking Survey” survey which is shared with UNICON members in the November/December conference.
 2. Additional surveys or studies will be selected by benchmarking committee members based on input from member schools.
 3. Additional surveys or studies may be conducted at the request of membership when a significant external shock impacts a majority of schools. Past examples have included a post September 11, 2001 survey and a SARS survey in 2003.
2. Design surveys and studies

1. Survey and study design is responsibility of the committee members. A committee member will be designated for each survey/study design or redesign. This responsibility can be shared by a small committed team of members (2 or 3 maximum).
2. The committee can recommend that an outside service provider be selected for particularly sensitive surveys or study. If this option is selected an RFP tender process will be the responsibility of the Committee.
3. Survey and Study Execution
 1. This will be coordinated with the UNICON web master or approved third party.
 2. Benchmarking Committee will periodically review online survey and study tools used. Committee may recommend upgrading tools to allow for more robust data analysis and/or greater ease of data collection and analysis.
 3. Antitrust/Competition Requirements/Restrictions

Required Conducts

1. Annual survey and study reports will contain only historical data concerning members and not current data, except where, in UNICON's sole discretion, the publication of current data cannot reasonably be expected to give rise to an actual or perceived antitrust violation or where the provision of current data is necessary for the annual survey reports to be useful to Members.
2. Annual survey reports will publish data without any identifying information regarding the Member who provided the data. Data published in the annual survey reports will generally be published in the aggregate and will be as general as possible while still permitting the annual survey reports to be useful to Members.
3. Collection of information from Members for annual survey reports will be conducted and managed by a third-party data collection service provider or by UNICON employees, and no information collected will be disclosed or made available to any Member except through the publication of the annual survey report.
4. Survey questions requesting any price-related or cost-related data, including without limitation prices charged, discounts offered, salaries paid, and benefits offered, will be limited to data that is more than three months old.
5. For any statistic disseminated through the publication of the annual survey report, the statistic will be based upon data from five or more Members, no individual Members' data will represent more than 25 percent on a weighted basis of that statistic, and the data comprising such statistic will be sufficiently aggregated such that it will not allow Members to identify the prices charged or costs incurred by any particular Member.

6. Annual surveys reports are provided by UNICON to Members for informational purposes only in order that Members might increase efficiencies and improve education services offered to customers, and are not intended to influence or require Members to take or avoid any particular course of action, and Members are not bound by any conclusion, opinion, or recommendation contained in any such annual survey report. Members shall independently evaluate all information contained in such annual survey report to determine, what, if any, action to take as a result of such annual survey report.
7. [Optional] UNICON will make annual survey reports available to all Members and may make annual survey reports available to nonmembers, but UNICON may require nonmembers to pay a fee equal to the reasonable cost of preparing and delivering such annual survey reports, and any such fee will be established by UNICON in its sole discretion.

Restricted Conducts

1. Annual survey and study reports will not include any recommendations regarding any action Members should take based on the survey report.
2. Annual survey and study reports will not include conclusions or predictions regarding future price or cost trends.
3. Annual survey will not request information from members concerning future actions that Members may take with respect to pricing or costs, and annual survey reports will not include such data or information if acquired by UNICON.
4. Annual survey and annual survey reports will not study or report on pricing information, except in accordance with the antitrust safe-harbor guidelines provided by the United States Department of Justice and the Federal Trade Commission and substantially reproduced in Sections V.B.1.c through V.B.1.e, above.
5. Members shall not rely exclusively on the data, conclusions, or other information provided as part of the annual survey reports in determining future actions regarding pricing, costs, target customers, target geographic markets, and similar matters.

Committee Members

1. Committee members will serve on a voluntary basis for an annual term.
2. New members will be invited to join at the November/December UNICON Conference. An updated Committee Roster will be shared with the UNICON Board in January.
3. The Committee will have two Co-Chairs who are UNICON Board members. An off-board co-chair may also be added.

The Benchmarking Committee adheres to the [UNICON Antitrust/Competition Policy](#).